From Education for All
to Lifelong Learning:
A critique of EFA
and an alternative vision

“At this year’s (G8) summit, we need to recommit ourselves to making serious and sustainable progress toward the Millennium Development Goals. We can, and should, celebrate the progress we’ve made, but we also need to be frank about where all of us – developed and developing countries alike – have fallen short. ... We (must) also look at: how we can foster the innovations that can be the game-changers in development.”

- President Barak Obama
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EXECUTIVE SUMMARY

We agree completely with President Obama: if the world truly aspires to achieving common goals, we must be frank about our failures—and the lessons they impart—as well as about our successes.

Even more important is President Obama’s remark that we must find for MDGs “innovations that can be game changers”. Such is the intent of this report on EFA.

A roadmap for the future of Education for All

A comprehensive evaluation of the outcome of Education for All (EFA), even after acknowledgment of partial successes, leaves no one in any doubt that it will fall well short of its lofty aims.

Yet, in facing up frankly to the root causes of disappointments, we may take much from the efforts and experience of the past decade that will serve us well in the future.

The present assessment of the experience of EFA is intended to take us beyond an evaluation of its goals, its problems and its outcomes. By its very nature, an evaluation encompasses these elements. However, what the world now requires is to build on the positives and negatives of the EFA experience. We need to know what steps should now be taken, and by which means, that will enable attainment of educational aspirations that are universally acclaimed and admired as emblematic of human cooperation and international caring.

A global learning architecture

The Policy Action Group on Learning conceives of those aspirations through the image of building a global learning architecture. We need, then, to identify the elements in the EFA experience—the successes, failures and key issues—that require enhancement, improvement, or transformation in order to construct such an architecture.

Architecture implies conscious design of the whole, organising the elements in a way as to integrate and harmonise each component so that the ensemble has a unity that is greater than the sum of its parts. Architecture also implies a conceptual and actual framework. Within a sound and serviceable framework, many diverse functions and possibilities exist. Modern efficacious designs are often modular, adaptable to different contexts, different needs, and various uses. Successful contemporary architectural design expresses a clear overall vision, but also an internal flexibility that allows for many futures.

In reviewing and critiquing the progress of EFA, PAG-L’s analysis and recommendations are infused by the imperative to shift from global prescription to global architecture. In so doing,
our purpose has been to bridge gaps between apparent opposites in order to prepare optimal conditions for future success. We must reconcile the need for global and national educational goals with realities and empowerment locally, on the ground. The very discourse we employ to do so must redound of reconciliation of diverse perspectives and experiences.

**A roadmap for the future of education for all: Ten organising principles**

The goal of any interim evaluation of an ongoing effort is to promote positive change. In the present case, our objective is to present a roadmap for EFA that looks to a future beyond 2015. We accomplish this goal by articulating fundamental organising principles for that future roadmap, principles that flow directly from the experience to date of attempts to develop and implement EFA. We proceed by setting out these ten organising principles; and then move to an in-depth analysis of EFA experience to date, together with an exposition of the impact that application of these ten principles will have on the success of international education efforts into the future.

In this sense, the organising principles espoused by PAG-L in the present assessment of the progress of EFA also constitute its most salient recommendations to the international community.

**PAG-L’s ten organising principles for a successful EFA:**

1) *Move from a cumulative approach to a transformational focus*

EFA has generally assumed that simply adding to numbers in seats through massification and completing studies is the basis for progress.

In a transformational focus, we shift our concept of the nature of learning —and therefore our ambitions. Implicit in this transformation is the move to systems that are: learner-centred, as opposed to merely institutionally or state-centred; that envisage learning as a community focus and responsibility; emphasize quality of the educational experience and its results in the labour market; utilise optimally diverse modes of delivery; and treat adult and early childhood learning as educational goals of high importance.

2) *Shift from prescribed objectives to contextualised policies and goals*

When we pursue local solutions for a global movement, we decline to standardise goals or interventions. Within an acknowledged global framework, and in accordance with agreed expectations, we contextualise objectives and policies. In this combined top-down/bottom-up approach, aims and methods are not prescribed from above.

This dialectical process will create optimal conditions for success.
3) Gender

Education or Learning for All (LFA) equity for girls in the South is no more critical an issue for EFA in its broader sense than is the crisis in male education in many regions of the North.

If EFA is to be attained, we must not allow political correctness in the South to impede girls’ education; or political correctness in the North lead to acceptance of failure of many males to reach their full learning potential.

Although gender issues are different in each hemisphere, North and South are linked by their gender-based weaknesses.

4) Adopt an expectations approach nationally and internationally

In all domains of Education, success becomes more likely when funders adopt an expectations approach, rather than dictating specific goals that must be attained.

The difference is subtle but significant: a top-down modus operandi—whether imposed by national education authorities on regions and institutions or by international funders on national governments—often meets with resistance and resentment. A pure bottom-up approach may lead to chaotic failure to set targets and achieve them.

When the approach is based on a series of expectations to which both parties have agreed (whether internal to a country or between donors and recipients), probabilities of attainment are higher. Under this model, expectations are established dialectically. They are the product of constructive engagement of the two parties.

The clear advantages of this approach are: setting of a transparent and agreed framework for intervention; a culture of participation and responsibility, involving and engaging all interveners; bi-directional accountability taken seriously; and the promotion of leadership locally, regionally and nationally.

Expectations-setting bridges divides.

5) Local solutions for a global movement

Bridging gaps involves the search for local solutions in a global movement.

Globally, we need goals, whether these be those established a decade ago by EFA or an improved set through a more advanced process. But these objectives must be adjusted and contextualised: local solutions are required. In this, the dialectic parallels that of the process of setting expectations through local-regional-national-international engagement.
6) Intersectoral nature of Learning

EFA has had an understandable fixation on formal, basic education. However, we need to apprehend education as an imperative for sustainable development—economic, social, environmental, and individual.

We need to focus also on dimensions other than formal education. We crave a comprehensive approach involving all ministries within Cabinet, not just Education. We must cease working in silos.

There is particular exigency to involve Health (health literacy), finance and industry. In other words, we must give impetus to education for development.

These dimensions link to learning that is: learner-centred, demand-driven, informal/non-formal; as opposed to simply massification of formal basic education.

7) A third group: those not achieving full learning potential

With respect to Lifelong Learning, populations do not fall into a binary situation, divided simply into those fully benefitting from a knowledge and skills advantage, and those who are marginalised.

The third group is in a majority in OECD countries and encompasses many in developing economies, especially emerging economies of Latin America: those who do not reach their full learning potential. The existence of this massive third group constitutes a principal link between the experience of North and South. Therefore, our critique of EFA has global relevance in this respect, not just in the South.

In all countries, in both hemispheres, we must shift from an industrial-era model of Education for All to a contemporary aspiration of Lifelong Learning for All, implying: a participatory model engaging communities and individuals in organisation of learning; an emphasis on learning how to learn; elucidation of personalised learning pathways for individuals.

Education everywhere must be acknowledged to be driven as much by demand as by supply.

In short, learning must be rendered sustainable, so that learners may attain their potential, harbouring aspirations that currently massively outstrip provision of opportunity.
8) **The overall goal of EFA should be the creation of a learning architecture**

Whether at local level, nationally or internationally, the comprehensive purpose of educational efforts is to create a learning architecture—a culture within which all may access means to strive to learn lifelong.

An architecture implies that component parts fit together as seamlessly, efficiently, and economically as possible. It also implies an understanding that we must consciously link all aspects of learning into an integrated whole that permits individuals and communities to benefit from learning opportunities throughout their life cycles.

It is not the case that lifelong learning, described in this way, allows aspirations befitting only the wealthy, or that developing countries can provide only a singular focus on school-age children. Interventions from international, national and local bodies and actors should be to encourage the creation of conditions optimal for lifelong learning (LLL).

9) **Moving from focus on deficits and gaps to identification of assets**

Progress in the learning across the lifecycle that will drive human development cannot be optimally catalysed by a focus on educational deficiencies of countries and regions.

While there must be transparent and accurate reporting of educational attainment in comparison to goals, there must also be identification and capitalisation on the learning assets of those same countries and regions. Demonstrably successful holistic models and means of defining and building on learning achievement in indigenous populations apply equally to developing and emerging economies.

Focus on assets presents the advantage of promoting learner and societal resilience.

10) **We need to learn from a critical analysis of aid effectiveness**
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N.B. Abbreviations and Acronyms can be found after the Conclusion of the Report
INTRODUCTION

This document is the product of the PAG-L’s reflections on education and learning on a global scale. It is meant to constitute a critical contribution to the policies and strategies developed since 1990 to achieve the objectives of Education for All (EFA). PAG-L commissioned this paper to be ready for the G8 summit to be held in June 2010 at Huntsville, Ontario. The spirit in which we are working has been encapsulated by President Obama in an interview with Bono:

“at this year’s (G8) summit, we need to recommit ourselves to making serious and sustainable progress toward the Millennium Development Goals. We can, and should, celebrate the progress we’ve made, but we also need to be frank about where all of us – developed and developing countries alike – have fallen short.”

President Obama went further and pointed out that “we (must) also look at: how we can foster the innovations that can be the game-changers in development.” **PAG-L’s objective here is to explore the need for and physiognomy of the “game-changers” needed in order to achieve education for all within a reasonable time frame.** For this, we envisage a new “architecture”, designed to support achievement of EFA objectives.

The 2010 G8 and G20 summits held in Canada recognised the need for the global community to work towards effective approaches for attaining the MDGs, especially in Africa. Recognition that much has been accomplished, but that more needs to be done, these declarations state that both developed and developing countries must do more, not only when it comes to the provision of resources, but also the manner in which development institutions are structured and work with their developing country partners.

Created in 2002, PAG-L then stated that its principal task “is to critical review issues surrounding education and learning, and the impact of the forces of globalization from a predominantly humanist and holistic perspective.” PAG-L’s target audiences were identified as “not just professional educators or academics but, rather, decision-makers of national bodies charged with educational and training responsibilities, as well as those of the multi-lateral bodies charged with providing both ‘upstream’ and ‘downstream’ assistance. As

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a result, it was decided that PAG-L would “concentrate on the strategic issues that highlight humanistic and holistic perspectives on global learning for a new century.”

In 2010 we are a mere six years from the deadline for reaching the six EFA objectives established at the World Education Forum (Dakar) in April 2000. 2010 is also the last opportunity for excluded children to be able to complete their primary education in 2015. It is already half a decade after the failure of the pledge for gender parity (with its target year of 2005). 2010 is two years away from the end of the United Nations Literacy Decade (2003-2012), with its aim of stimulating the EFA objective of achieving a 50% decline in illiteracy rates. Lastly, 2010 is the year of the UN Global Compact Summit for sustainable development.

The results of the 2010 EFA Global Monitoring Report are, generally speaking, more of a cause for concern than a reason for rejoicing.

There has been progress, and the numbers dispel the myth that poor countries are unable to achieve rapid progress in education, particularly with regard to decreasing the number of children with no schooling and the number of illiterate adults, as well as an improvement in the integration of girls. However, the report underscores that, if the pace remains as is, final results will be well below the established objectives:

- For example, 56 million children of school age will not receive schooling in 2015. This number is currently 70 million.

- There are presently 71 million adolescents who are not being schooled, 54% of them girls. 759 million adults around the world are illiterate, two-thirds of them women. 40% of the children who leave primary school in some African countries are illiterate...

The report "rubs salt into the wound" by observing how reality is often worse than what national statistics show. Studies illustrate, for example, that some school records can exaggerate the number of children with schooling by 30%. Surveys of households attest, moreover, that the number of children with no schooling is higher than figures presented in school censuses.

Wealthy countries are also concerned by the state of EFA. This not only because their commitments have not been respected, which led them to stagnate since 2004, and to drop by a fifth in 2007. In this regard, the 2010 report cites a $16 million USD funding deficit for 46 low-income countries, in spite of the commitment of richer nations to ensure that no country truly embarked in EFA would be thwarted by a lack of resources.

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Problems associated with successful learning by all are not limited to the developing countries. They are also present in the wealthy nations. Instances of dropping out or leaving school early can be seen in most of the countries that have long since achieved Universal Primary Education (UPE). The gaps noted herewith as regards the success or failure of learning are often indicative of social and cultural lines of fracture that are illustrative of deep-set disparities and discrimination. Illiteracy, or insufficient literacy, which can be defined according to various levels and criteria, affects a significant percentage of the population. France's National agency to combat illiteracy reports that 10% to 14% of the country's citizens (aged 18 to 65) are illiterate. In Canada, 4 out of 10 adults are considered to possess literacy skills at a level insufficient for a knowledge economy and society. According to the Right to Read Foundation, 42 million Americans cannot read at all, and 50 million can only read at a primary level (4th or 5th grade). These numbers, moreover, are growing by 2.5 million each year.

While these data must be taken in context, they nonetheless illustrate the equity requirements of EFA. In addition to favouring access to education, EFA also promotes the effectiveness and quality of learning for everyone. This concerns not only statistics, but most importantly, the numerous marginalized who are living in a society where information and knowledge constitute strategic resources for a better professional and personal life.

Such is the reality underlying this document which, first and foremost, promotes a critical reflection of all aspects of Education for All, in particular:

- The changed scope and meaning of education as put forth by EFA;
- The interpretations, visions and perspectives of EFA developed by nations' political leaders;
- The national and international policies implemented;
- The implications in terms of development and results.

This paper is not an abstract review of EFA, but rather, draws lessons to be learned from the experience, in order to identify new paths, paradigms and approaches that could serve as a framework for the building of a new learning society.

In that sense, we wish to draw in leaders and stakeholders committed to EFA policies:

- national governments, local communities and target communities;
- international development agencies;
- civil organizations, including unions and private sector groups;
- various networks focused on education and comprised of researchers, thinkers, experts and media and public moderators.

The ultimate goal is to discover new orientations for strategic thought and infuse some life into local and global action for quality education worldwide.

This report comprises two parts. Part 1 is an assessment of the current state of EFA as seen from several perspectives: the vision and concept of EFA; national EFA policies and practices, which leads to a typology of EFA policies; the policies and practices of international financing and technical partners committed to ensuring the success of the EFA goals; and a brief overview of the results of the EFA movement. Part 2 proposes PAG-L’s vision of a global architecture designed to promote effective EFA. This architecture is composed of ten elements that address issues related to the conceptual basis of EFA:

- the importance of lifelong learning;

- the development of learning societies;

- the delivery of educational services, respect for local/national context and knowledge, equity and gender;

- the importance of focusing on assets rather than on deficits and gaps, and drawing lessons from a critical analysis of aid effectiveness.

These analyses and thoughts are presented with the intention of contributing to a broader conversation aimed at identifying the “game-changers” needed for achieving the goals of EFA.
PART 1: Assessing the state of Education for All

1.1. This section presents an overview of the state of EFA and the responses to the EFA goals and challenges that have come from the developing countries and their international financing and technical partners. The conceptual basis of EFA is reviewed, followed by a classification of country policies aimed at meeting the EFA challenges. Three types of policies are identified: status quo, corrective and transformational. After reviewing the conceptual basis for EFA and associated national policies, we then focus on the policies and practices of the international development partners that are committed to supporting countries in their quest for EFA. Here, we review recent critical analyses on the effectiveness of these partners’ efforts, as well as the nature of the aid relationship. Part 1 concludes with a brief stocktaking of the outcomes and results of the EFA movement, including a critical look at the indicators used to assess EFA.

A broader and more innovative vision of EFA

From Jomtien to Dakar

1.2. At the World Conference on Education for All — held from March 5 to 9, 1990 in Jomtien, Thailand — all of the world’s governments, international development agencies and civil organizations committed themselves to the key objective of meeting the basic educational rights and needs of all persons, regardless of age, gender, place of residence, or cultural, linguistic or socio-economic background. The primary challenges in this regard were identified:4

- More than 100 million children, including at least 60 million girls, have no access to primary schooling;
- More than 960 million adults, two-thirds of whom are women, are illiterate;
- More than one-third of the world's adults have no access to the printed knowledge, new skills and technologies that could improve the quality of their lives and help them shape, and adapt to, social and cultural change;
- More than 100 million children and countless adults fail to complete basic education programmes;
- Millions more satisfy the attendance requirements but do not acquire essential knowledge and skills.

1.3. In order to meet these challenges, the Conference's final declaration (article II) defined the orientations of the broadened and innovative approach to ensuring basic education for everyone:

- Universalizing access and promoting equity;
- Focusing on successful learning;
- Broadening the means and scope of basic education;

• Enhancing the environment for learning;
• Strengthening partnerships.

1.4. Ten years later, from April 26 to 28, 2000, Dakar, Senegal was the site of the World Education Forum, attended by 164 states and partner organizations. This Forum evaluated the progress made by 183 countries since Jomtien, i.e., between 1990 and 1999:

i) Progress milestones:
- Over 82 million additional children enrolled in primary school, 44 million of them girls;
- Increase in the net enrolment rate in developing countries;
- Improvement in the gender equality ratio in sub-Saharan Africa;
- Moderate growth in early childhood protection and education programs;
- Spurt in literacy rates (to 85% for men and 74% for women).

ii) Ongoing challenges:
- 113 million children with no access to schooling;
- 880 million illiterate adults;
- "...a powerful correlation between low enrolment, poor retention and unsatisfactory learning outcomes and the incidence of poverty";
- The most problematic areas are sub-Saharan Africa and Southeast Asia.

1.5. The Dakar Framework for Action validates the EFA vision put forth at Jomtien, by emphasizing the sense of urgency, progress monitoring and measurement indicators, and completion timeframes. On this basis, six objectives were included in the "collective commitments" of governments and their development partners:

i) Expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
ii) Ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality;
iii) Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes;
iv) Achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
v) Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls’ full and equal access to and achievement in basic education of good quality;
v) Improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

1.6. We are now at Dakar +10, and the most recent EFA monitoring report (2010) casts a somewhat gloomy outlook: "...the world is unequivocally off track for the Dakar goals and the battle to achieve universal primary education by 2015 is being lost." (UNESCO 2010:5).
When we consider that the efforts and investments involved specifically targeted this latter goal as well as gender parity, achieving the other EFA objectives becomes even more speculative.

- How should this decidedly lukewarm EFA report be analyzed and evaluated?
- Why have the commitments, policies and practices of the governments and their partners failed to uphold EFA promises and/or the challenges necessary to achieve them?
- What should be learned from the experiences of the various countries and their development partners with regard to identifying new opportunities and creating a new dynamic?

**EFA’s conceptual framework**

1.7. In order to address these questions we need to tackle the broader issue of the scope and meaning of EFA in key areas of education and society. This requires systemic reflections on: overall visions and perceptions of society; the role of law; modes of thinking and action, policies and strategies; orientation and the organization; governance and resources; and learning processes and content—all within the framework of the existing social structure and socio-economic conditions. In considering these factors, we need to enquire about how attaining the EFA objectives brings new factors into play. In any case, the concept of basic education introduced by EFA is a departure from previous “deficit” and cognitivist notions.

1.8. This type of education no longer consists of simply teaching elementary reading, writing and calculation skills. In addition to these learning tools, basic education must meet the "basic learning needs" of all human beings. It focuses on learning with the aim of enabling each individual to acquire the knowledge, abilities, skills, values and attitudes necessary "to be able to survive, to develop their full capacities, to live and work in dignity, to participate fully in development, to improve the quality of their lives, to make informed decisions, and to continue learning."

1.9. It follows, therefore, that education should not be insular: it should be integrated into all aspects of society. Education should also not exist in a vacuum where it fails to take into account the diversity and evolution of the basic rights and needs it is meant to address. These rights and needs correspond to the specific circumstances and times in which children, adolescents and adults, as well as all those concerned, grow and/or work, as well as the ensuing requirements. Learners must therefore not be considered as blank slates devoid of history, know-how and experience, to be filled up with standard knowledge.

1.10. Education is an interactive process that rests on the learner and the learning continuum. Its dialectical links with social, economic, political and cultural processes make it an integral part of democratic growth and development, and this as both a contributing factor and an outcome. All of these factors also explain why education is about more than simply schooling. It supports all social sectors and levels in which it is present, in various forms and
on different terms. Human beings learn in a number of ways, be it through the media or other sources, via information and communications (libraries and museums, etc.), in the workplace, through cultural and leisure activities, within their community and family, while exchanging with peers, through intergenerational contacts, and more. Conversely, education also has an impact on all social sectors and activities.

1.11. In the same vein, basic education cannot consist solely of primary education, for it also involves youth and adults. Basic education cannot be considered complete within the timeframe dedicated to primary education, but, rather, should be the foundation of learning which begins at birth and continues throughout life.

1.12. EFA is not a utopia designed to mobilize, but an essential right and human need which today has the potential for being achieved. Some consider EFA as an ideal, construed for the main purpose of creating a mobilization around established objectives rather than seeking to achieve them. Seen this way, the progress made could be deemed acceptable, if one avoids reaching for the "impossible". Such a point of view is untenable. EFA should be at the heart of people's fundamental right to education, as stated in article 26 of the 1948 Universal Declaration of Human Rights. As such, it should be intimately linked to the recognition of and respect for human dignity. This notion renders it universal. Inseparability and universality, however, lose all of their meaning if rights are not effectively assured. States thus have an ethical, political and legal obligation in this regard. This obligation ensues from their moral responsibility to ensure fundamental human rights as well as the political promises and legal commitments inherent to the international declarations and conventions to which they have adhered. It cannot be complied with through the mere acknowledgement of people’s formal right to education, even if such a right is legislatively or constitutionally acknowledged through a notion of compulsory education with no restriction for the States. Rather, it submits them to a fundamental requirement, to a strict adherence to their political commitments and to the judicial restriction associated to the establishment of concrete conditions for exercising the right to education for everyone "with no distinction based on gender, income, place of residence, language or ethnic origin." To do otherwise would be akin to discrimination. It also bears noting that the education in question is not just of any type. The quality education for everyone required under international conventions constitutes access to other rights, freedoms and responsibilities that each individual must exercise to develop to his full potential while taking an active part in his life and social development.

1.13. The question most often asked thus becomes: As no one is bound to achieve the impossible, is this attainable? Should we not instead be realistic and accept the progress enabled by EFA in its role as a mobilizing utopia?

1.14. We often hear that humanity does not ask questions to which it cannot find an answer. Over the past century, it has and continues to make astounding scientific and technological advances, while experiencing unprecedented economic growth and social progress. Globalization has enabled the development of new economies based on
knowledge and innovation; and the media revolution and new information and communication technologies have shrunk time and space, creating a true "global village". Colossal sources of information have combined with exceptional communication channels to favour the emergence of knowledge-based societies. All of which transforms the 1990 Jomtien Declaration and EFA into a medium appropriate to our era: "These new forces, when combined with the cumulative experience of reform, innovation, research and the remarkable educational progress of many countries, make the goal of basic education for all — for the first time in history — an attainable goal."

These new strengths also enable knowledge and the skills acquired through education to enjoy a hegemonic position in the production and exchange of goods, the growth and distribution of income, the diminution and breakdown of cycles of poverty from one generation to the next. They also promote information and behaviours critical to active citizenship, good health, environmental consciousness, and more. As a result, EFA is today more critical than ever to both individuals and society as a whole.

1.15. How can we, on a global scale and based on a lack of resources or insufficient knowledge or abilities, seriously justify the global impossibility of ensuring that all human beings be entitled to exercise their right to education? The core issue revolves around the will, vision, policies, strategies and practices that must be instilled to mobilize resources and abilities so that they will promote EFA goals and the growth of humanity rather than allow them to be wasted through wars, weapons of destruction and unexplained excesses. While poor countries may not be able to resolve these matters independently, international cooperation surely can. This perspective underlies the international commitment clearly expressed by the richer nations under the Dakar Framework for Action: "no countries seriously committed to education for all will be thwarted in their achievement of this goal by a lack of resources."

1.16. In addition to financial resources, EFA should be based on new ways of thinking and acting in the educational sphere. This was emphasized in article II of the 1990 Jomtien Declaration: "To serve the basic learning needs of all requires more than a recommitment to basic education as it now exists. What is needed is an 'expanded vision' that surpasses present resource levels, institutional structures, curricula, and conventional delivery systems while building on the best in current practices." In seeking out the "totally new possibilities" and "innovativeness" advocated by the Jomtien Declaration, EFA required true paradigm changes in order to transform:

- existing discriminatory and elitist systems into equitable systems accessible to everyone;

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6 This is illustrated by comparing military budgets with the costs of attaining EFA.

• traditional state governance into governance based on partnerships;
• a participative model into one focused on a diverse offer and the integration of various demand-based forms and modes of education;
• a sector approach to education into one based on cooperation and inter-sectoral initiatives;
• basic education within the framework of primary education into an approach founded on lifelong learning;
• education into learning...

1.17. While many schools of thought consider education as a factor promoting social equity and socio-economic mobilization, transforming educational systems is not sufficient in order to remove all of the obstacles to learning and basic education. Some of these obstacles, moreover, can exist in tandem. They include poverty and other marginalization factors such as place of residence, gender, ethnic, linguistic and cultural origin, and realities such as hunger, malnutrition, disease, conflicts... This means that, as advocated by the Jomtien Declaration, EPA's success is contingent on the introduction of support policies to counter poverty, disease and malnutrition, as well as promote social security, employment, linguistic development and an environment steeped in local languages.

1.18. The combination of these new paradigms and approaches has led to the creation of a new conceptual and referential framework for EFA based on a culture of equity and quality education. This framework is based on the premise that everyone is entitled to education as well as being educatable. Education quality is thus not measured according to the strong results of a few learners, but on the basis of everyone's successful learning. This leads to a correlation between quality and equity, which reflects the notion of quality education for everyone. For this to be successful, educational systems and policies must provide everyone with equal — but not identical — opportunities. Everyone hence needs to be assured of the conditions applicable to his respective requirements and special circumstances, with the aim of ensuring successful learning for all. This clearly illustrates that the uniform model, pyramidal architecture and selective and insular operations of traditional educational systems are inappropriate for achieving EFA. Rather, EFA requires approaches that are both integrated and diversified, based on individual or collective rights and needs, democratic, sectoral or inter-sectoral, and designed to promote quality.

Do the national policies and practices adopted by the countries correspond to EFA requirements?

National EFA policies and practices

Collective commitments

1.19. The responses first refer to the twelve collective commitments agreed to in Dakar and in synergy with EFA requirements. "To achieve these goals, we the governments,
organizations, agencies, groups and associations represented at the World Education Forum pledge ourselves to:

(i) mobilize strong national and international political commitment for education for all, develop national action plans and enhance significantly investment in basic education;

(ii) promote EFA policies within a sustainable and well integrated sector framework clearly linked to poverty elimination and development strategies;

(iii) ensure the engagement and participation of civil society in the formulation, implementation and monitoring of strategies for educational development;

(iv) develop responsive, participatory and accountable systems of educational governance and management;

(v) meet the needs of educational systems affected by conflict, natural calamities and instability and conduct educational programmes in ways that promote mutual understanding, peace and tolerance, and that help to prevent violence and conflict;

(vi) implement integrated strategies for gender equality in education which recognize the need for changes in attitudes, values and practices;

(vii) implement as a matter of urgency education programmes and actions to combat the HIV/AIDS pandemic;

(viii) create safe, healthy, inclusive and equitably resourced educational environments conducive to excellence in learning, with clearly defined levels of achievement for all;

(ix) enhance the status, morale and professionalism of teachers;

(x) harness new information and communication technologies to help achieve EFA goals;

(xi) systematically monitor progress towards EFA goals and strategies at the national, regional and international levels; and

(xii) build on existing mechanisms to accelerate progress towards education for all.\(^8\)

**The need for specific policies and strategies**

1.20. Even though the EFA imperative, and its associated reforms, applies to all countries, “the heart of EFA activity lies at the country level.”\(^9\) This statement underscores the critical importance of national ownership as well as the core responsibility of national States for the necessary partnerships. This national ownership also denotes that the

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8 From paragraph 8 of the Dakar Framework for Action.

9 Dakar Framework for Action, para. 16.
development and implementation of EFA policies must take diversity into account and that each country has its own specific circumstances.

1.21. Depending on the extent to which educational systems have evolved, countries may be more or less close to (or far from) the objectives to be reached. Developed countries and some developing countries have achieved Universal Primary Education and enabled their population to enjoy a high literacy rate. Nonetheless, there are a variety of challenges associated with EFA related to equity and the quality of their systems. An increase in dropouts, learning failures, and the illiteracy that often characterizes the most underprivileged emphasize the issues of inequities and social exclusion. For those countries with high illiteracy rates and low levels of schooling, the challenges are major and complex, requiring increasingly extensive efforts to develop inclusive educational systems, particularly in light of the difficulties engendered by poverty and the burden of high population growth.

1.22. In terms of gender parity, the majority of developing countries are still far from achieving the established objectives and will need to continue making significant efforts for the inclusion of girls and women. Other countries, including developing countries, are currently faced with difficulties for the inclusion of boys; this is particularly prevalent in the Caribbean and Latin America (Nicaragua, Venezuela, Brazil) as well as in Asia (Mongolia).

1.23. Policies to counter marginalization must respond to varying challenges, depending on circumstances. Problems regarding inclusion vary tremendously, as do solutions. Imagine, for example, the differences between populations spread out over vast territories, nomadic groups and people living in zones that are not easy to access and populations crowded in shantytowns as a result of the massive migration of rural residents to the city. Unilingual or multilingual environments, with or without a unifying hegemonic language, face different challenges in adopting an appropriate language or languages of schooling to favour successful learning by everyone. The same also holds true for displaced populations or refugees fleeing a war zone, street children, child workers, special needs children, children afflicted with AIDS, orphans…

1.24. Policies to promote quality must also be designed to adapt to changing needs and situations. Priorities with regard to funding and learning improvement strategies will differ depending on the underlying systems (for example, well-established versus nearly destitute). The strategies applicable to pedagogical organization and teaching-learning also vary depending on whether there is a plethora of students or if their numbers are of reasonable, i.e. diminished, size. Depending on circumstances, quality policies can often extend beyond the area of education, coming to bear on the protection and safety of children, health or nutrition programs, and support for parents, etc.

1.25. There is also a need for flexibility as regards the school year and daily/monthly schedules that would be based on the specific characteristics of the environment and related constraints and opportunities.
1.26. These specific features and data can be conveyed through unique combinations of characteristics typical of a particular country or region. Their analysis is important, for they must be taken into account when developing and implementing policies and strategies to effectively meet the challenges specifically addressed by EFA. What is the situation with national EFA policies in this regard?

**Interpretations of EFA’s enhanced and innovative vision**

1.27. Before analyzing the ground-level implementation of EFA, it is important to see how countries have understood and interpreted the enhanced vision of EFA and to what extent their interpretations appropriately reflect its spirit and goals. These interpretations can be reviewed by considering the documentation prepared by countries to translate their commitment to EFA into the orientations and goals of educational policies and action strategies and priorities: primarily EFA action plans, but also sectoral programs to promote education, legislative and/or constitutional provisions on the right to education, poverty reduction strategy papers (PRSP), etc. The elements considered in this instance are commitments and intentions that have been declared, rather than policies already implemented.

1.28. The core commitments underpinning EFA rest on the notions that form the very heart of Education for All:

- Banishing existing inequities in education by promoting inclusive systems that allow for including the excluded and offer equal opportunities to all, regardless of age, gender, place of residence, socio-economic environment, disabilities, and ethnic, linguistic or cultural origin;
- Ensuring quality education for all, in particular by removing obstacles to successful learning associated with poverty, poor health conditions, malnutrition and other sector-dependent limitations and drawbacks.

1.29. In other words, policies firmly converging on equity are a sine qua non of the success of EFA. Based on this basic principle, the analytical framework for country EFA plans examines:

- educational-related goals and objectives for respecting the right to education included in the six Dakar objectives;
- the definition of priorities and strategies in the education sector, along with intersectoral, sectoral and sub-sectoral funding plans and budgeting allocations designed to counter inequity;
- the involvement of all stakeholders in the design and development of policies and, in particular, partnerships with civil society, community involvement and the participation of marginalized groups, assessed by their impact on policies and planning;
- multisectoral and intersectoral support policies and their focus on the elimination of obstacles (poverty, malnutrition, disease and other exclusion factors).
1.30. As agreed to at the time of the Dakar Framework for Action, countries were required in 2002 to produce their EFA programs or enhance existing programs when appropriate. Since then, annual EFA Global Monitoring Reports have analyzed national EFA programs of countries that have, for most of them, translated their visions into plans. Other texts such as education sector development programs and poverty reduction strategy papers (PRSP) also address national EFA policies. Various countries have in turn illustrated their commitment to EFA by producing legislative documents or adopting constitutional amendments.

1.31. We have noted that the EFA approach is based on fundamental human rights, which entail national political obligations to fulfill the commitments made in Jomtien and Dakar in the context of legal obligations ensuing from the ratification of international United Nations conventions and charters. However, few countries have taken legislative and/or constitutional steps to bolster the right to education subsequent to Jomtien and Dakar. While most countries have laws on compulsory education, the commitments to EFA called for going significantly further. Academic instruction addresses only two of the six EFA objectives. Moreover, EFA, does not only concern children. It also targets adolescents and youth and adults who have never attended school or who did not obtain the anticipated benefits. And lastly, the right to a quality education for everyone implied under EFA constitutes a right that enables achieving other human rights or, in other words, the ability to independently exercise all of one's rights, freedoms and responsibilities.

1.32. Since 1990, countries such as Argentina, Cambodia, Guinea, Madagascar, Niger, Nigeria, Uganda, Lao People's Democratic Republic and Thailand have all instituted free compulsory primary education. This indicates progress that is limited by an academic vision. Of particular interest is the 93rd constitutional amendment passed in India in 2001 that not only introduces basic education as a fundamental right, but also provide all persons with the option claiming that right in front of a court of law. In addition to an enhanced vision, this provision goes far beyond the strictly formal nature of the strict legal obligation.

1.33. As regards EFA policies, a review of the national visions reveals that, overall, countries generally fail to define specific goals, objectives and strategies covering the right to basic education under the six Dakar objectives.

1.34. Universal primary education is addressed in all programs, where timeframes are usually fixed. The indicators used by the countries, however, illustrate that universal primary education is generally denoted in terms of access (first-year admission rates or gross enrolment ratios) and less often, in terms of overall primary school enrolments, as required by EFA (net enrolment ratios or primary completion rates). With the exception of parity between boys and girls, the other EFA objectives, when included in programs, are rarely operationalised, with no specification as to targets, progress indicators and achievement timeframes.

1.35. Overall, in spite of the few countries that have struggled to develop a global approach to Education for All, diminished and fragmented visions of EFA generally prevail
when formulating policies. Elsewhere, the review of 48 programs in the EFA monitoring report of 2002 concluded that "...the fact that a number of these education development programs are not compliant with the basic principles espoused in the Dakar Framework for Action is a major cause for concern" (UNESCO 2002).

1.36. The priorities of EFA policies should be guided by a concern for inclusion, incorporated into data gathering and situation analyses, as well as in the areas of planning, budgetary allocations and funding. The majority of the EFA programs examined fail to rely on the rigorous collection and analysis of adequately disaggregated information to enable identifying and more specifically pinpointing those persons who are educationally marginalized and underprivileged. In these instances, the stated priorities remain abstract, and we have little knowledge of target priorities, much less of the specific obstacles to education access and existing exclusion mechanisms. Such information would favour the development and implementation of appropriate corrective strategies. This explains why programs mention these issues, but do not include details on their implementation. At best, programs can incorporate priorities to increase budgets allocated to education and to a portion of education often restricted to primary education. Such budget growth is necessary and represents a stated will to prioritize education and basic education. However, inclusion cannot be promoted unless there is specific support for strategies targeting the excluded, notably through equitable public funding that gives more to those with less. In fact, the absence of strategic plans and strategies in this regard appears to be the most prevalent "rule" in such EFA programs. The only noteworthy exception appears to be attention to the education of girls by certain of these programs. This weakness in terms of equity is further exacerbated by the neglect affecting non-formal education and alternative systems. While the latter may be mentioned in programs, their development and the associated budgets are rarely planned. Overall, this results in all of the funding efforts being oriented towards the traditional system, whose development and operations are expected to require nearly all of the budgeted resources. Clear intersectoral strategies focused on equality in education and poverty reduction are even less present in EFA programs.

1.37. This overview does not completely cover all aspects of every EFA program. A review of 44 national EFA programs illustrates that 7 of them incorporate data for identifying and pinpointing those who are excluded from the system (UNESCO-IIEP 2009). While 7 is a low number, we can nonetheless observe that there are exceptions.

1.38. EFA policies and planning fail to adequately focus on the marginalized because their process is often technical and does not truly integrate all stakeholders as recommended in both Jomtien and Dakar. State and civil partnerships and community involvement in the definition and planning of EFA policies have increasingly occurred at the national level, and this through formal consultations, often to comply with the requirements of funding parties. This formalized approach has been much more frequent than the one based on listening to and taking into account the NGOs, the private sector and target communities, in particular the most disadvantaged. The Forum of NGOs held in Porto Alegre, Brazil in 2002 emphasized that EFA national forums were not solidly entrenched at a
time when the EFA programs of several countries were completed or nearly so. Moreover, a review of the EFA programs illustrates the absence or extreme weakness of options and priorities regarding the poorest segment of society, innovative concepts for learning and literacy, strategies adequately targeting the excluded, diverse modes for the delivery of education, flexibility as regards reformed systems, and open and democratic partnership mechanisms and participatory processes. These aspects are the ones which could be integrated to EFA programs through the input of organizations dedicated to equality, advocates for the poor, and actors experienced in developing and implementing alternative education and training systems. The absence of such a contribution is the clearest indication of the lack of true involvement by all stakeholders and more importantly, by civil society, in the preparing and planning of EFA programs.

1.39. In reality, and contrary to what is happening at the international level, mutual understanding and cooperation within the countries themselves, beyond formalities, distrusts, and conflicts between States and civil societies are major challenges. Many governments feel that the role of NGOs is restricted to buying into and supporting policies that they alone are responsible for developing and planning. Such beliefs lead these governments to react poorly to critiques or alternative streams of thought, often restricting the involvement of civil society to formal consultations and the provision of educational services. This has the effect of limiting the extent to which civil society can actively participate in the elaboration of policies. Certain NGOs, particularly union organizations, hesitate to get fully involved in the elaboration of such policies, preferring to avoid being a "stakeholder" or "concerned" by government policies. This stance enables them to maintain the distance necessary for their independence while continuing to formulate their critical positions.

1.40. In such circumstances, it is no surprise that programs fail to include the educational system reforms necessary to meet everyone's fundamental needs. Or that when mentioned, these are rarely adequately specified or planned. For example, while decentralization is mentioned in most action plans as a means of creating an opportunity for community participation in education, it is rarely given the direction to enable such an approach. In fact, the decentralization processes illustrated are increasingly technical and administrative, rather than policy-oriented. They consist of the dispersal or devolution of powers to central local authorities and at best, to local communities. It occurs, however, with no true measures for accountability and space for initiative for communities and actors at the core of educational systems, particularly regarding governance, decision-making and resource development, as well as the allocation and use by learning and training institutions. In fact, most programs, except for those in Brazil, Chile, Salvador, Guatemala, Paraguay, India, Nepal, and Sri Lanka, do not incorporate elements favouring local decentralization mechanisms to promote the success of education: data collection, maps of neighbourhood schools, planning, management and supervision, evaluation and studies.

1.41. A review of the programs also illustrates that the majority of them fail to include reforms for reducing financial and material obstacles (elimination of school fees, school
nutrition programs, scholarships and bursaries to financially support parents). Other reforms
could serve to bring children “closer” to schools, but are merely alluded to: maps of
neighbourhood schools, classes grouping together multiple grades, mobile schools, school
transportation, residential schools.

1.42. Some programs also include reforms designed to take account of local, cultural or
religious traditions or addressing local languages. Rarer are reforms focused on system
diversification as a means of adapting to various circumstances and targeted requirements.
These, when present, include the mobilization, alignment and integration of existing and
latent State and societal resources, through formal and informal learning methods and
alternative academic upgrading and support mechanisms, in support of over-age children or
those who are failing school, the introduction of a flexible learning pace and school
calendars to allow for greater adaptability to specific environments (agricultural activities, for
example), and others.

1.43. Few of the programs reviewed mention curriculum or education reforms (with the
exception of incorporating local languages) developed with the specific aim of ensuring
quality education for all: increased relevance (meaning, usefulness and use) of learning
according to specific needs, challenges and circumstances; active, participatory and
consciousness-raising learning strategies that can be adapted to diverse educational
environments; mechanisms for the regular follow-up and evaluation of learning attainment
and the diagnosis of factors that sustain inequities; dynamic and equitable policies for early
childhood protection and education; promotion of culture and quality…

1.44. EFA programs are also rarely focused on a sustainable sectoral framework. The
2002 GMR goes even further, claiming that "Government structures continue to militate
against a comprehensive approach." In some instances, notably during the early years of
EFA, a clear distinction was drawn between EFA programs and education sector
development programs. Once EFA programs were integrated to the latter, they appeared to
shrink in scope, to merely focus on basic education, i.e., primary education. Planning
became increasingly focused on process management of the system’s pyramidal structure
and various funding levels, as a means of "protecting primary education" rather than
promoting vertical and horizontal synergies with the potential of strengthening the system's
abilities and democratization as a means of meeting the fundamental requirements of
education for everyone. The logic whereby primary school prepares students to enter
secondary school, which in turn prepares them for enrolment in higher education sessions, is
not questioned. Hence, the drop-outs from one cycle to the next continue to be considered
as system "detritus". When the children in question are aged 11, 12 or 13, have just
completed their primary education, are not yet of legal age to work, and have no opportunity
to continue learning (as is the case in numerous poor countries), we can only wonder about
their fate. For systems caught up in this pyramidal impasse, the only exit mechanisms
provided under existing policies involve an extension of the academic obligation (compulsory
education), including in those countries where UPE is far from reality.
1.45. Many EFA programs also fail to incorporate the intersectoral approach based on cooperation and coordination between ministries. The sectoral silos still rigidly adhered to are representative of the lack of in-depth collaborative reflection and coordinated action from the various governments. This observation is somewhat mitigated by a review of poverty reduction strategy papers, which propose an integrated development approach that includes EFA objectives. But here too, an analysis of these PRSPs sheds light on at least three specific realities. Of the six EFA objectives, only the two promoted by the Millennium Development Goals (MDGs) — primary education and gender parity — are regularly taken into account. The educational objectives and strategies that have often been repeated from education ministry texts and integrated into poverty reduction strategy papers (PRSP) are not clearly aligned with actions to fight poverty. Paradoxically, most PRSPs contain no mention of informal education and when they do, it is not planned with the goal of constituting concrete actions to bring skills and abilities to the poor.

1.46. In concluding this analytical overview of national programs and the EFA policies they seek to implement, the underlying visions appear traditional rather than innovative, and fail to concretely tackle inequity. In other words, the EFA interpretations that carried the day at the country level were those based on tradition rather than revision. This observation, unfortunately, applies to the implementation of policies as well as their development. This is validated by the 2009 Global Monitoring Report: “Progress towards the EFA goals is being undermined by a failure of governments to tackle persistent inequalities based on income, gender, location, ethnicity, language, disability and other markers for disadvantage. Unless governments act to reduce disparities through effective policy reforms, the EFA promise will be broken.” (UNESCO 2009:1)

**Typology of national EFA policies**

1.47. Even though each country has developed its own EFA policy documents, there are sufficient similarities in country policies to be able to classify them into three broad categories or groups. This allows us to construct a typology composed of each group. A caveat is always in order when presenting a typology: each group (or type) in the typology is an abstraction designed to encompass a number of cases which have strong similarities but are not identical. Indeed, the individual types may not be mutually exclusive. The advantage of typologies is that they bring a semblance of order to the phenomena of concern to us. By creating a typology for national EFA policies we are in a better position to view the gamut of national EFA policies on the basis of the criteria used to construct the typology. This, in turn, allows for critical analysis at higher levels of generalization than if all we had was a multitude of individual cases.

1.48. An in-depth analysis of countries' development processes, practices and outcomes reveals the differences that put the characterization of national policies into perspective. In terms of the major EFA requirements, as stated in Jomtien and reiterated in Dakar. Policy options can be categorized on the basis of two general criteria:
The first criterion concerns the requirement of a thorough critical analysis of the existing systems in order advance towards the EFA objectives.

The second criterion involves inventing new approaches, particularly regarding reforms for equity within EFA policy programs.

1.49. Three types of policies have been identified according to these criteria: (i) policies focused on maintaining the status quo, (ii) corrective or adjustment policies, (iii) radical and transformational policies. This classification is based on dominant policy trends and characteristics, for each policy can incorporate elements of other "types" without being fully representative of them.

**Status quo policies**

1.50. Status quo policies to meet the EFA goals exist because governments are not respecting the letter and the spirit of United Nations conventions in favour of equal opportunities in education. This is a sovereign choice. Such is the case for some countries in Latin America and in Africa where higher education is the priority, even while many children will be illiterate. Elsewhere, the entire education sector is not a priority, compared to other sectors that are seen as more important for development. Emergency situations (natural catastrophes, civil wars) may also put off implementation of EFA objectives. Nonetheless, for whatever the reason, the education policies adopted by these governments fail to illustrate any imperative in accepting responsibility or a sense of urgency in their actions in support of EFA. Dedicated EFA policies are often, therefore, considered a mere component of "business as usual".

1.51. In general, status quo policies are not based on a critical analysis of the existing system that address questions such as: Why the educational system has is not attaining EFA; why it is inequitable; why it produces poor learning outcomes; and, where are its dysfunctions. Not only are these questions not addressed, but he decision makers generally take an uncritical stance and claim that there are no alternative models.

1.52. The policies developed and introduced in this regard retain the traditional educational system (as it was) and are immune to the need for reform and innovation. The orientation towards EFA only consists of seeking additional funding to enable an expansion of the existing system, most often through the building of schools, the purchase of equipment, and the recruitment of additional teachers. While such actions are of course necessary under EFA objectives, much more is needed. Such EFA policies — focused on the status quo — are generally comprised of cumulative strategies, and the various stakeholders’ contribution to the development and planning of the policies themselves is generally minimum, if present at all. Its core elements reflect the beliefs of the elite in positions of authority and are oriented (either consciously or unconsciously) towards its own propagation. Policy formulation, planning, implementation and evaluation of these policies remain in the hands of the policy elites. Civil society, communities and other stakeholders who may have ideas, opinions and relevant knowledge are often excluded from the process. When they are consulted, it is usually to provide material support for the existing system.
1.53. Status quo policies are generally insensitive to the demand for basic education. They are not concerned with the nature and diversity of needs and conditions of target populations, especially the most marginalised. They don’t take into account the factors of exclusion in order to provide improved access. Rather, they are supply-based policies where all are expected to adapt to the uniform school model.

1.54. As for the six Dakar objectives, status quo policies focus on formal instruction, allocating very few resources and little consideration to other forms of education and training. Whenever literacy is in question, it appears as a didactic model, within methods solely devised to promote "schooling". The same holds true for early childhood protection and education, which is translated into pre-schooling, mainly for children from the most privileged layers of society. In other words, children should be ready for school even if they are not ready for it. This supply-driven model does not allow for schools that are ready for all the children, especially not for those from the most marginalised strata of society who are also most likely to fail in school.

1.55. Such policies that have the effect of reducing all education to schooling are supplemented by a "decontextualization" of education, namely its detachment from any links to people's political, social and economic environment. Education thus becomes a singular entity made available to "deficient" populations without taking their particular circumstances or needs into account. This results in a supply-based approach and which does not consider socio-economic and other factors of inequity, thereby leading to a focus on the easily accessible. Also, educational systems are usually built around a country's official language, to the exclusion of all other languages spoken by local populations. Such status quo policies conserve the existing system and are based on simplistic strategies.

1.56. This limited model is clearly unable to satisfy the broad variety of rights, needs and circumstances. It will not ensure the successful schooling of the marginalized and underprivileged. This leads us to conclude that EFA cannot be achieved through policies based on the status quo and mere extension of traditional approaches, mindsets and educational systems.

Corrective policies

1.57. Corrective or adjustment policies illustrate a greater degree of urgency or necessity — albeit moderate — for EFA than do status quo policies, but do so from an evolutionary perspective. The analyses on which they are based yield meliorist policies, without any fundamental critique of the system. In order to meet EFA requirements, these policies focus on progressive reforms of existing systems through small corrective actions for each issue.. These policies incorporate features of reductionist strategies which may be mitigated by the introduction of innovative elements designed to favour early childhood protection and development, as well as a few significant initiatives in support of informal education and alternative learning systems for children, adolescents, youth and adults. Corrective policies
are also more sensitive to equity and development strategies, generally targeting girls and other marginalized children. These strategies include the:

- elimination of school fees;
- reduction of physical and cultural distances between schools and isolated children or children belonging to ethnic minority groups;
- development of mobile schools for nomadic children;
- introduction of local languages at the school level, within a bilingual education structure;
- implementation of curriculum or education reforms aimed towards success in disadvantaged environments...

1.58. These reforms are more sensitive to demand than the status quo policies, but they have a limited scope. They are often partial, isolated or locally-focused; they are often experimental in the sense that they don’t call into question the nature of existing systems. From this perspective, EFA corrective policies are also based on cumulative strategies.

1.59. Even if they are less reductionist than status quo policies, corrective policies are centred mainly on basic education, universal primary education and gender equality, as well as on education per se. In practice, this is detrimental to the sectoral approach and to taking into consideration informal elements as well as intersectoral interactions and cooperation critical to fighting poverty and reaching all excluded and marginalized persons. Such policies often revolve around PRSPs.

1.60. An analysis of 18 second-generation PRSPs, with special focus on education, however, underscores:

- poor links to the EFA agenda;
- problems in defining credible quality objectives and strategies;
- a gulf between education and broader governance reforms;
- a lack of attention to factors that work to the disadvantage of the poor in the area of education.

The review concludes that there is little reason to believe that second-generation PRSPs have helped reduce the disparity in planning between education and other ministries (Caillods & Hallak 2004).

1.61. Another characteristic of these corrective policies is that the planning, reforms and innovations adopted are largely externally focused. Compared to status quo policies, the integrated national approach obviously allows more space for the contribution of various stakeholders and civil society in the development of corrective policies. Their impact on these policies is obvious in a few of the reforms mentioned below. Yet, an analysis of these policies allows for observing the greater impact of outside influences, which leads to an inadequate focus on problems specific to various local environments.

1.62. The resulting absence or inadequacy of national ownership is evident in a number of areas:
• A government tendency to strive towards meeting the selection criteria attributed — for reasons right or wrong — to funding parties and thus become eligible for outside funding;
• The recommendations, often nearly mandatory, of these funding agencies as to the priorities and strategies to be promoted by governments, particularly with regard to two education objectives included in the millennium goals (MDG): primary education and gender parity;
• A nearly systematic reference adopted by funding agencies and governments with regard to the Fast Track Initiative (FTI) for adhering to the criteria of a credible EFA program, stated in a standard manner;
• The introduction of global expertise, acquired through the conventional wisdom of international bodies, to replace the contribution of national experts to the development and planning of national education programs, justified by a lack of ability at the local level.

1.63. International capture of national programs has resulted in uniform policies and strategies that appear indifferent to the various factors present in local and national environments. This is illustrated by a study of 45 country education plans that found remarkable policy similarities between them, with limited attention to social and political context or to the constraints faced by marginalized groups (UNESCO-IIEP 2006).

1.64. In spite of the compromises necessitated by the various sources of influence, economic analysis has dominated the development and implementation of these policies, as well as the associated arbitration criteria and methods, which are based in calculations of socio-economic gains. Education is seen increasingly as human capital, hence a factor of economic development, rather than as a fundamental human right. This often precipitates selective policies based on the alternatives deemed the most cost-efficient, regardless of their contribution to equity. The road to EFA is considered as a step-by-step approach, with various actions put forth, all of which mostly neglect those populations that are the most difficult to reach as well as the more complex issues, particularly those pertaining to quality. By failing to fundamentally question the existing inequitable systems through a systemic reform approach and by adopting evolutionary, step-by-step development strategies, corrective policies ensure that achieving EFA objectives will never be possible within the established timeframes.

Transformational policies

1.65. Transformational policies are primarily based on a strong sense of the urgency and imperative nature of EFA. They are supported by national leadership committed to the

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10 Also, Samoff (1999) describes a similar process for educational policy analysis sector studies.

11 See Stein, Tommasi et al. (2005:221-241) for an analysis of the political economy of policies aimed at improving the quality of education in Latin America.
primacy of EFA and are determined to attain it. They generally consider education both as a fundamental human right and a mechanism of social equality and socio-economic mobility. Bolstered by a strong political will for social change, transformational policies are based on dynamic national leadership that elaborates shared and reforming policies, firmly prioritizes education in its resource mobilization and allocation, appropriately commits the State's infrastructure and strengths, and involves the various stakeholders in the achievement of EFA. The radical logic guiding them requires a paradigm change for EFA to be attained. In other words, the existing systems, deemed inequitable, must be subverted to be reshaped for and by the radical change. A systemic approach to change immediately becomes necessary, and must be centred on achieving education for all. The participation of all stakeholders at every step of the process also seems critical to success, including development, planning, implementation, monitoring, evaluation and readjustment of policies. This requires the introduction of strong institutional mechanisms at the national level, which extend all the way to the target communities. However, transformational policies are more demand- than supply-driven. They mobilise a diversity of approaches: formal and non-formal; distance and open learning; as well as a variety of programmes. In addition to gaining synergies, this also provides a variety of opportunities that can be reinforced by for bridges between the different approaches throughout the lives of the learners.

1.66. Education should not be isolated from other sectors, but rather considered an integral element of the social transformation project and a key factor and central condition to its success. Social inequity must not be replicated as inequity in education. Reforms of educational systems must be clearly oriented towards equity, and co-exist with multi-sectoral strategies and actions funded and targeted to benefit the most disadvantaged and correct the inequity and discrimination identified through an in-depth analysis of national and local environments. The objective should not simply be to improve access and ease of access, but also to ensure quality education for all, meaning that everyone has the potential to be educated and can thus learn successfully, inasmuch as opportunities are made available and the conditions appropriate to each person's circumstances and needs are ensured. Such quality education must also create opportunities for individuals to exercise their rights, freedoms and responsibilities, to personally flourish and to enable the sustainable development of society. In this perspective, all societal and State educational resources, latent or actual, formal and informal, should be systematically identified and introduced to promote the development of learning communities.

1.67. Transformational policies should be at the heart of effective and accelerated EFA policies. They can accomplish this as both a factor and a process of social transformation aimed at bringing out the potential of all. Part 2 of this paper explores how they can lead to remarkable results for both equity and quality.

1.68. Table 1 presents an overview of the typology along with the major characteristics of each polity; selected examples are discussed in Element 2 of Part 2 (paragraphs 2.2 - 2.36). When this classification is applied at the country level, we note that the vast majority of countries have adopted policies that are more akin to corrective policies. They do not risk
the radical calling into question of the status quo and as such, a breaking away in order to determinedly commit to a process of qualitative change. Instead, they perpetuate the past, in spite of adopting new forms. These policies are variations of the past, which go a long way towards justifying the mixed results of EFA. We observe, on the one hand, the extraordinary progress vis-à-vis access to primary education ensuing from cumulative and reductionist strategies, and on the other hand, the slow pace of the equity and quality that are the hallmarks of EFA. At the two extremes, there is a select set of policies that can be classified as status quo or transformational policies. The first, bound by the status quo, are unable to adequately meet EFA requirements and make a significant contribution to its achievement. They exist in countries with governments with no sense of commitment and that often feel isolated from the global progress being made, either due to the lack of commitment and accountability to their population or because of internal emergencies, crises and conflicts that shift their attention and efforts to other areas. On the flip side, those policies that have fully embraced the EFA philosophy and its transformative social implications have had their strategies and results cited as examples of what countries should be doing to achieve EFA.
Table 1. Overview of EFA Policy Types and their Characteristics

<table>
<thead>
<tr>
<th>EFA Policy Type</th>
<th>Major characteristics of the policy</th>
</tr>
</thead>
</table>
| Status quo policies | • Low level of political will for aggressive EFA policies, leading to a low level of mobilisation for EFA  
  • Minimal stakeholder contribution  
  • Little critical analysis of current system  
  • Retain traditional education system and resource base  
  • Resource-based, supply-driven approach  
  • Based on the formal system  
  • Little drive to generate new resources  
  • Cumulative strategies; more of the same |
| Corrective policies | • Political will expressed through government plans and programmes for EFA, but with a moderate sense of urgency  
  • Problems are acknowledged, but insufficient recognition of current system’s incapacity to eliminate inequities  
  • Policies more supply than demand driven  
  • Focus on the formal system with marginal activities for non-formal delivery  
  • Stakeholder involvement is mostly consultative and often limited to material inputs  
  • Reforms aimed at bringing more children to school (gender, poor)  
  • Reforms often limited to pilot activities which are not mainstreamed; they are local and often isolated  
  • External assistance (DPs) play a large role, which raises questions about ownership and sustainability  
  • Curricular reforms (relevance, language of instruction) |
| Transformational policies | • Rooted in a strong sense of urgency, dynamic national leadership and clear political will, leading to mobilisation of national resources (government, civil society)  
  • Reform based on a radical social critique and a systemic, intersectoral approach which are seen as factors for broader social transformation for equitable development  
  • Policies are more demand than supply driven, with a decisive orientation toward equity  
  • Strong stakeholder participation, at all levels and phases of the policy making process  
  • Full resource mobilisation within a diversified and integrated approach that covers formal and non-formal delivery modes  
  * Reform is part of a broader social mobilisation that favours achieving EFA over a short period |
The policies and practices of the international development partners

Financing and political will for EFA

1.69. A successor to previous unsuccessful efforts to promote universal primary education (UPE), EFA as an organized effort germinated within the international organizations that sponsored the 1990 Jomtien conference that founded the movement. The International Development Partners (DP) played the founding role of the EFA movement, and have assumed responsibility for its subsequent maintenance and development (Chabbott 2003).

1.70. The most ostensible purpose for launching EFA was to attract new resources to basic education and to concentrate attention and energies on attaining basic education for all — by 2000 as called for at the founding EFA conference in 1990 at Jomtien, and then by 2015 at the Dakar conference in 2000. From 1992 to 2008, official development assistance to education has increased by 29.1% in real terms. Tables 2a and 2b show the evolution of aid to education since the beginning of the twenty-first century. Table 2a shows that from 2000 to 2007, aid to education has increased (in real terms) by 53% while aid to basic education increased by 34%. However, we also see that from 2006 to 2007 aid to education has stagnated, whereas aid to basic education has actually declined by about 22%. Table 2b focuses on the relative share of ODA going to education in general and to basic education in particular. This table tells the same story as Table 2a that provides absolute numbers. Table 2b shows that the proportion of aid going to education has varied little since 2000, hovering around 9-10%, but the share to basic education appears to be more erratic, increasing to 44% in 2006 and then declining to 35% in 2007. Most recent OECD-DAC data for 2008 indicates that whereas the share of education to total aid remains at around 10%, that going to basic education has declined to 28%. Also, the fact that 70%

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12 Also known as the donor agencies or financing and technical partners. We prefer “development partners” as it is more inclusive: it includes donors and lenders, UN specialised agencies that are not funders, as well as NGOs.

13 The World Bank, UNESCO, UNICEF, UNDP and UNFPA. The organizing secretariat was led by an official from the World Bank and another from UNESCO; it was located within UNICEF headquarters in New York. See Heyneman (2008) for a World Bank insider’s brief view of how EFA was conceived.

14 There is a less orthodox and seriously academic courant whose analysis is that the promotion of EFA should be seen as a macro-trend in the development of a world culture in which faith in education is a major component (Chabbott 2003).


16 Two possible explanations come to mind: (i) the increasing share of aid going to budget support, without subsectoral allocations; (ii) the increasing demand for post-basic education as a result of the rising numbers of graduates from basic education.
of aid to education comes from seven donors\textsuperscript{17} raises questions about the predictability of this aid, especially in these times of acute financial uncertainty. In any case, international financing for EFA has not been up to the level of the international community’s noble intentions.

**Table 2a. Aid flows to education since 1999-2000: Total aid**

<table>
<thead>
<tr>
<th>Type of aid</th>
<th>Total aid to education (constant 2007 US$ billions)</th>
<th>Total aid to basic education (constant 2007 US$ billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bilateral</td>
<td>5.9</td>
<td>10.0</td>
</tr>
<tr>
<td>Multilateral</td>
<td>2.0</td>
<td>2.4</td>
</tr>
<tr>
<td>Total</td>
<td>7.9</td>
<td>12.3</td>
</tr>
</tbody>
</table>

Source: UNESCO GMR, 2010

**Table 2b. Aid flows to education since 1999-2000: proportions going to education**

<table>
<thead>
<tr>
<th>Type of aid</th>
<th>Share of education in total ODA (%)</th>
<th>Share of basic education in total aid to education (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bilateral</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Multilateral</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Total</td>
<td>10</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: UNESCO GMR, 2010

1.71. Of course, two years do not establish a trend (and currently available GMR data prevent us from going beyond 2007), but there is reason to monitor closely the flows of aid resources to basic education. If this does become a trend (as more recent OECD-DAC data seem to suggest), it might be worthwhile to hypothesize that the limits of status quo and corrective policies are meeting their echo in declining external resources to basic education. Could this indicate declining international enthusiasm for business as usual approaches? Or, rather, could it be related a perception that the absorptive capacities of the recipient countries have reached a plateau? For now, this is pure speculation. However, it will be

\textsuperscript{17} Based on data in the GMR, they are the World Bank (IDA), France, Japan, Germany, U.S.A., Netherlands, and U.K; together, they accounted for 70.6% of aid to education in 2007.
necessary to keep these questions in mind if this decline of support to basic education is confirmed in figures for 2008 and beyond.

1.72. A recent review of aid to education (Steer & Wathne 2009) finds that although there has been real progress in generating momentum and political will for basic education, the sector has "not been able to capture the attention of 'high-level' political and other public figures on the global stage." This study finds that, in comparison to global meetings in other sectors, those for education have been noted for the absence of high-level political and other figures. Furthermore, they note, when education has managed to gain the support of top leaders (such as Gordon Brown, James Wolfensohn and Hillary Clinton), financial and other support for education has increased. In other words, the political will of the development partners needs to be addressed. The absence of one or more high profile, international “champions” for EFA may be seen as a signal of less-than-full commitment.

1.73. It may be useful to contrast the education sector with the health sector where, since 2000, the amount of aid has more than doubled (in real terms) and the share of overall aid has increased from 3.7% to 5.0%. One reason given for this is provided in a survey of donor agencies conducted by Steer & Wathne (2009), where respondents state that the health sector has “a much stronger evidence base and a more vibrant and innovative literature on results of health interventions.” The education literature is seen as "less exciting" with "fewer breakthrough and solutions to specific problems." As dramatic as this may seem, however, comparisons between the two sectors should not be carried too far. The very nature of education and health interventions are radically different: it is normal to expect relatively rapid results in health (cures, ending epidemics, discovering effective drugs and vaccines) whereas interventions in education take several years to provide reliable results in a context where the definition of valid outcomes is still debated (for example: how much socialization? how much cognitive learning? what cognitive learning and how is it measured?).

*The delivery of aid*

1.74. In addition to the flows of aid to education, it is also important to look at the delivery forms that the aid takes. There are two dimensions to this: (i) the instruments that are used to transfer and manage resources; and (ii) the policy aspects of the aid and what is perceived by some as the “strings” that are attached. Since the beginnings of EFA, the instruments have evolved from a project-dominated approach to aid that is increasingly disbursed in the form of budget, programme and sector support, often without clear subsector allocations. Curiously, over the same period, there has been a decline of education professional capacities in the donor organisations where education sector dialogue with countries is increasingly handled by generalists and macroeconomists (Steer & Wathne 2009).

1.75. There are no definitive explanations for this observation, which is shared by many. One reason could be that as aid morphs from project to programme support and, beyond that, to budget support, agencies find less need for sector specialists. Another possibility
reason is that the increased presence of macroeconomists, finance and procurement specialists is a result of the fact that aid is increasingly conditioned by macroeconomic and fiduciary factors, rather than by educational and development factors. Yet another possible explanation is that the DPs focused more on the financing of the sector than its technical improvement. Also, internal evaluations in the DP agencies were often more concerned with their own functioning than development impact. Another factor could be that the financing institutions, such as the World Bank, took center stage in conducting the policy analysis which became the basis for the policy recommendations on which their financing was predicated. In other words, they became the judge of policy as well as being a major financing partner. These points help to explain the predominance of economics in the DPs. Furthermore, just as the proceeds of budget support are fungible and, therefore, lose their specificity, so are the macroeconomist generalists who can work in any sector within the agencies.

1.76. In other words, the lack of clear sector specificity (beyond indicators to be monitored) in the designation of aid makes it easier for the DPs (“donor” organisations) to use generalists to administer it. In theory, fungibility of staff within an organization is expected to reduce long-term administrative costs, especially if the task structure within that organization changes along with mission changes. In practice, however, this changes the nature of partnerships as the financing partners gradually lose their capacities to fully engage in sector-specific policy and technical dialogue.

1.77. Shortly after the Dakar Conference, thirteen external agencies ¹⁸ commissioned a large-scale evaluation of external support to basic education (Freeman & Faure 2003) that concluded “what is most lacking ... is a willingness and determination to improve basic education through locally developed solutions, which are most relevant to the particular contexts of partner countries and which are built from the ‘ground up’ rather than through the application of blueprints and templates developed at a global level”. The key findings of this evaluation were:

(a) External agencies have tended to rely on blueprints, templates and prescribed solutions. We need more tailored local solutions within a global consensus on goals.

(b) Even though the shift to programme support is an indication of the commitment of external agencies to strengthen partnerships, it has, in some cases, contributed to increased tensions and divisions among distinct

¹⁸ The Canadian International Development Agency (CIDA); Ministry of Foreign Affairs − Danida, Denmark; European Commission (EC); Ministry for Economic Cooperation and Development (BMZ), Germany; Ministry of Foreign Affairs, Ireland; Japan International Cooperation Agency (JICA); Netherlands Ministry of Foreign Affairs; Ministry of Foreign Affairs, Norway; Swedish International Development Cooperation Agency (Sida); Department for International Development (DFID), United Kingdom; United Nations Educational, Scientific and Cultural Organization (UNESCO); United Nations Children’s Fund (UNICEF) and the World Bank.
groups of external agencies. On the positive side, it has led to some improvements in the sense of national ownership and to better coordination of external assistance.

(c) This movement to programme support needs to be accompanied by an understanding of the positive role of project assistance, especially in supporting innovations and in providing targeted support to marginalized groups.

(d) The movement to programme approaches in supporting basic education has not always been accompanied, at least in the short term, by a reduction in the administrative burden for host governments.

(e) While progress has been made in providing access to primary schooling, there are serious persistent problems in improving the quality of basic education.

(f) Funding levels from the external agencies have not kept pace with expectations or implied commitments. In part, this is a reflection of the complexity of planning and resource allocation processes surrounding the provision of external support and to problems in the absorptive capacity of partner governments.

1.78. These six key conclusions (of 2003) show that there is clear room for improvement in the way in which external partners have been going about their support to EFA. This evaluation was intended to be formative—i.e., to assist the agencies that sponsored it to learn from their experiences and adjust their practices accordingly. There has been no systemic assessment of progress since this evaluation. However, we do not see much movement towards a focus and emphasis on locally developed solutions, and the issues surrounding absorptive capacities are still very much with us.

1.79. One reason for this could be the decades-old conundrum of capacity building alongside the time-bound approval cultures in many agencies—i.e., the need to complete predefined products (projects, financing agreements, reports) by well-established deadlines. All too often, the timing and substantive requirements of the external agencies are not those of their partner governments who, in order to work with their financing agencies—i.e., produce plans and programs using formats and analytical methods often defined by the agencies according to their timing requirements—require technical and other capacities they lack. The result is diminished ownership over the products along with minimal efforts at working from locally developed solutions. Indeed, all too often the result is detailed solutions to ill-defined problems.

18 For the World Bank, this issue was identified as a major source of poor loan performance in a 1992 report done by a then World Bank vice-president W. A Wapenhans (Wapenhans & al. 1992).

20 This is an issue that has been reviewed and analysed by Naudet. (2000).
1.80. In addition to this, we note the inordinate energies and capacities situated at the policy and planning stages, which are the areas where agencies have often focused their capacity building efforts. This is understandable to the extent that the agencies are much more involved at the policy and planning stages than at implementation. However, we also note that disconnects between policy and implementation are rife (Bah-Lalya & Sack 2003). Pragmatically, there is every likelihood that policy will be implemented by the “apparatus” that is the education ministry with its myriad actors, including planners, curriculum developers, teacher trainers, administrators, inspectors, school directors and, most importantly, the teachers. And then there is the civil society including PTAs, community associations, NGOs (national and international), the private sector, the non-formal sector, and traditional educational systems that are often not accounted for but have considerable bearing on education in Africa. This is where it becomes much more complex than what appears in policy and planning documents. And this is why a theory of action ─ or a strategy for implementation that gives full consideration to the roles of all the actors ─ is necessary if policy is to have any meaning in practice. Furthermore, this is why capacity development efforts need to focus on the more downstream matters of implementation ─ which is about effective incentives, communication, decision-making processes, rules and regulations and, yes, know-how and the training needed to acquire it. We need to realize that policy is as implementation does, and that there may not be a high level of congruence between the skills that go into policy formulation and those required for successful implementation.

1.81. The major institutional innovation in the architecture of donor support to education since the 2000 Dakar Conference has been the emergence of the Fast Track Initiative (FTI) which was “launched in 2002 as a major effort to mobilise resources to support EFA” (Cambridge Education, Mokoro et al. 2009). It was designed to be an evolving partnership of developing and donor countries and agencies to support EFA and was expected to be (recipient) country-led and guided by the following principles: country ownership; benchmarking, performance-linked support; lower transaction costs and transparency. A recent mid-term evaluation of FTI (Cambridge Education, Mokoro et al. 2009) has concluded “set against the high initial aspirations for the FTI, its global effects to date seem rather meagre” and, “there is, as yet, no clearly visible ‘FTI effect’ whereby FTI endorsed countries outperform their peers and/or attract substantially more aid for basic education.” Some of the more salient—although not clear-cut—findings are:

(a) Since 2004, when FTI became fully operational, growth in aid commitments has slowed and the share of education and basic education in total aid commitments has remained steady. In other words, there has not been a shift of aid priorities to education in general, and basic education in particular.

(b) FTI does not appear to have refocused aid to the poorest countries.

(c) There are disagreements about FTI and how it should operate that have had an impact on its design and operations. The different approaches and perceptions of the different major players explain this.

(d) The leading role of the World Bank means adherence to its strict rules on trust funds.
(e) There are differences among stakeholders on emphasis (quality and learning outcomes; not sufficiently holistic; too much emphasis on government’s role; problems with the EFA goals, themselves).

(f) The institutional and organic aspects of capacity development have not been sufficiently taken into account.

(g) FTI is seen as having created a valuable space for dialogue and is a model of country-led collaboration.

(h) Monitoring by the FTI Secretariat has been disappointing and indicators have not been systematically tracked.

1.82. UNESCO’s 2010 GMR is more direct and states that “FTI in its current form is indefensible” and is “stuck in a vicious circle.” It recommends that FTI be repositioned as an independent foundation with a strong, independent secretariat not linked to the World Bank. This new or replacement FTI should also address the needs of countries in conflict and it should work on building national institutional capacities.

1.83. And now there are calls for a global fund for education coming mainly from the United States and the Global Campaign for Education. According to its proponents, such a fund would be “combine the strengths of the FTI with lessons learned from it and other global initiatives to make significant steps forward in elevating education on the global agenda” (Sperling 2008). Such a fund, it is argued, would coalesce and strengthen a number of factors and be characterised by: participatory governance and improved coordination between all partners (including NGOs and representatives of civil society); improved sense of ownership by both contributing and recipient countries; the level and duration of funding; greater trust between all partners; a stronger and independent global secretariat; use of a variety of instruments; adherence to widely-accepted principles for aid effectiveness, including rigorous monitoring and evaluation; fast response mechanisms; and greater public awareness of global efforts for the development of education.

1.84. A review of three global funds finds that “it is too early to tell whether these new agencies will be any more effective than traditional donor mechanisms” (Radelet & Levine 2008:454). Of particular interest may be the Global Fund to Fight AIDS, Tuberculosis and Malaria which has the following characteristics:

- it promotes ownership and participation;
- its objectives are focused on three diseases;

21 See: http://www.campaignforeducation.org/docs/reports/GFE/GFE%20Paper.pdf. “GCE is now convinced that a breakthrough in global education can best be achieved by bringing together and enhancing existing financing initiatives under the banner of a ‘Global Fund for Education For All,’ to improve mutual accountability and focus on results.”

22 Other global funds include: The Global Fund to Fight AIDS, Tuberculosis and Malaria; The Global Alliance for Vaccines and Immunisation; The Unites States’ Millennium Challenge Corporation (MCC).
• it was created to scale-up the funding for these three diseases;
• it has a relatively small bureaucracy;
• each participating country has its own country coordinating mechanism consisting of
government, NGO, civil society, and others that prepare and submit proposals to the
fund;
• there is broad ownership. It is a foundation whose financing comes from
governments and from the private sector (such as the Bill and Melinda Gates
Foundation) and is governed by board with representatives from donor and recipient
countries, NGOs, communities, foundations and private companies;
• its financing is complementary to that of traditional ODA. It operates more like a
traditional foundation (in the North American sense) than a development agency. It
does not design or implement programs and it does not provide technical assistance;
• it is supposed to be performance based.

1.85. In addition to the variety of instruments and organisational forms used (and
proposed) for the delivery of aid to education, we note the succession of emphases, policy
priorities, and fads that have characterised international assistance to education since
Jomtien. However, what is surprising here is that these fads have not germinated from the
variety of experiences in countries throughout the world (the “field”) but, rather, from the aid
institutions themselves. In the broadest of terms, this was already well characterised by
“... we have to be wary of the latest fads in the development field. They are
frequently transformed into simplistic and extremist ideologies which often cruelly
mark the life of nations. The current welcome emphasis on markets is no reason
for disregarding their shortcomings, and highlighting the weakness of the State as
a producer must not lead us to overlook the contributions government policies have
made to development in certain countries. Conversely, the failure of many attempts
to foist doctrinaire socialism irrespective of realities on societies with their own
long-standing structures must be acknowledged. There is not just one possible
development model, although this does not mean that all models can work."

1.86. The education sector, too, has seen its share of strategies that, after some time
take on the appearance of donor-driven fads. A sampling of these fads in the management
and delivery of education would include (in no particular order): decentralisation;
competency-based curricula; educational television; computer-based instruction; rate of
return analyses to determine where to invest; production function studies to identify effective
input allocation strategies; assessment testing; voucher systems; different forms of teacher
training; the overriding importance of textbooks; double shift schools; multi-grade classes;

It is important to note the distinction between goals (ends) and modes of delivery (means).
Growth is a goal; free, unfettered capital markets is a strategy for attaining growth. EFA is a goal and
a human right; many strategies and means have been articulated for getting there.
There are valid arguments for and against each one of these approaches. What is most noteworthy here is that they have been generated mostly by the development institutions in search of specific “solutions” to “problems” that are often poorly diagnosed and, in any case, highly diffuse in their nature. What is ignored is that context is a factor that determines the effectiveness of any given intervention. Context is complex; understanding it requires detailed and nuanced local knowledge.

**Recent critical analyses of aid and the development of doubt**

1.87. And, yet, there is still no “solution” in sight. No wonder, therefore, that we observe that a strong wave of doubt and agnosticism has been battering the shores of Development for the past several years. Criticisms of aid — the way it is conceived, administered, organized, delivered and implemented — have been around for almost as long as aid itself. However, whereas much of the earlier literature was the product mostly of academics and other outside observers, the most recent crop has been produced largely by insiders — current or recent staff of development institutions — with extensive practical, operational, analytical, and policy experience within these institutions. This new critical wave is evidence-based and the fruit of careful analysis. We present a brief overview of the most salient points made in this recent literature.

1.88. Aid produces corruption and sloth and should be replaced gradually by recourse to bond markets. Writing about Africa, Moyo (2009) argues that aid has encouraged many African leaders to focus more on the requirements of their aid providers than on their populations; meaning that accountability has been displaced accordingly. Indeed, according to her, “aid erodes the essential fabric of trust that is needed between people in any functioning society.” She sees a web of complicity between governments and aid agencies and cites a 1992 World Bank study that concluded that even though country compliance rates on conditions were below 50 per cent, tranche releases were close to 100 per cent. As

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24 Such fads are not limited to the world of international development education. In the USA, for example, some of the most recent fads that have clear partisan political implications include: charter schools, testing, vouchers, and accountability. A recent article in the *New York Times* describes the about-face of a leading US scholar of educational trends on these issues (see [http://www.nytimes.com/2010/03/03/education/03ravitch.html?hp=&pagewanted=all](http://www.nytimes.com/2010/03/03/education/03ravitch.html?hp=&pagewanted=all)).

25 Naudet (2000) and Pritchett & Woolcock (2008) have written about the solutions fallacy in development. When it comes to analyzing education systems, Samoff’s (1999) study of education sector studies notes the striking similarity between studies that are looking at wide variety of country experiences. Can one size possibly fit all?

26 By “Development”, we mean the whole field, which includes practice, policy formulation and the more analytical, academic literature.

27 This wave is best illustrated by the following works: Easterly (2006); Easterly (2008); Joseph & Gillies (2009); Pomerantz (2004); Moyo (2009) and Riddell (2007).

28 Some examples of this older literature include: Hancock (1989); Jones (2007); Laïdi (1989); Lancaster (1999); (Naudet (2000); Payer (1982) and Wachtel (1977).
she analyses the situation, there is a vicious cycle of aid which has the effect of crowding out private investment, which diminishes the quality of national governance, and chokes off the export sector by propping up the value of currencies.

1.89. The “aid curse” is akin to the “resource curse”: it develops rent-seeking behaviour and diminishes incentives for the political will necessary to confront the challenges of development (Moss, Pettersson et al. 2008). Displaced accountability to donors means that it is their agendas that trump those of the less well organised and articulate national polity. One manifestation of this is the negative association between aid volume and revenue collection. This reliance on aid as a substitute for local resources creates a moral hazard effect related to aid dependence.

1.90. The centrality and complexity of institutional capacity development have been relatively ignored. Indeed, the large volume of aid devoted to capacity building has focused on training with little concern given to in-depth analyses of organisational dynamics, including the relationship between their incentive/reward structures and their lack of efficacy. Given that over a quarter of World Bank credits to Africa between 1987-1997 were for capacity development, one is entitled to wonder about why they have not had a greater effect on African institutions (Moss, Pettersson et al. 2008; Grindle & Hilderbrand 1995; Marope 1999).

1.91. All too often, the “solutions” have turned out to be problems. We have seen “solutions” without well-articulated problems (Naudet 2000) and there have been solutions that have become, or have exacerbated the problems (Pritchett & Woolcock 2008). One reason for this is that expert-driven aid has avoided understanding the distinctions between need and demand. All too often, aid has been need-driven with insufficient understanding of the local context and the expectations of local populations.

1.92. For lack of serious monitoring and, especially, evaluation, we don’t know the results of most development interventions and programs. We have no systematic way of knowing what works. Although it may not be feasible for all aid to education to be associated with the randomized evaluations advocated by Duflo & Kremer (2008), it is necessary to accept their proposition that “credible impact evaluations are global public goods in the sense that they can offer reliable guidance to international organizations, government, donors, and NGOs beyond national borders.”

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29 Citing research, Moss, Pettersson et al. (2008) note that “when total aid is split into grants and loans, grants have a significant, negative effect on tax revenues, while loans have a significant, positive impact.”

30 Elinor Ostrom received the 2009 Nobel Prize for Economics for her work demonstrating the cost-effectiveness of local know-how when compared with “expert” solutions. In Nepal, for example, she finds that self-organized, relatively primitive irrigation systems are more productive than more sophisticatedly systems built and organized by government (Ostrom 1995).
1.93. Related to this is the little effort made to identify local experiences that, when seen from within countries and close to the ground, appear to be working. The lack of attention given to local knowledge, know-how and experience is startling (Maclure 1997; Marope & Sack 2001; Marope & Sack 2007). Instead of identifying assets in the form of local knowledge and experience, development agencies have tended to focus on deficits. One effect of this is to replace local expertise that has deep knowledge of context with international expertise that has good technical knowledge but little sense of context. Such ignorance fits well with the institutional constraints of agencies whose activities and incentive structures are linked to time-bound delivery schedules.

1.94. Nonetheless, as Reinikka (2008) points out, the “incentives in aid agencies and the political economy of aid in donor countries” work against reforming aid. There are several reasons for this: agencies need to be able to identify their own contributions; they face disbursement pressures and look to claim quick results; interest groups within donor countries must be taken into account; donors and recipients have different spending preferences; agency fiduciary concerns and incentives lead agencies to monitor inputs.

1.95. One effect of the pre-agnostic phase of development cooperation (but, are we really out of it?) is the combination of hubris and arrogance that often have characterised the daily work of development professionals and their agencies (McMillan 2008; Sack et al. 2004). Perhaps we know where we want to go, but do we really know how to get there? Back in 1986, Klees (1986:601) pointed out that "the reason that research on third world countries is seen to offer clear-cut policy implications is that, in any country, only one or two studies on the topic have been carried out." In countries like the US, the huge number of studies on any given policy topic, studies that often do not agree among themselves, means that there are always opposing views to any given piece of policy advice. For this reason, it would be wise to take McMillan’s (2008: 505) advice that

“Reform is hard to do because we cannot predict its effects. Reform advice often seems to be based on the presumption that we know where we are going and we know how to get there. Perhaps we know where we want to go, but often we do not know how to get there. There is no recipe for success. Since we do not know for sure what will work or how long it will take to work, all we can do is trial and error. Acknowledging our ignorance means moving step by step rather than betting everything on a comprehensive blueprint.”

1.96. At last, we are beginning to realise how much we do not understand. Take, for example, the importance of textbooks. In the late 1970s we could read that “the availability of books appears to be the most consistent school factor in predicting academic achievement” (Heyneman & al. 1978). This led many agencies to invest heavily in textbooks in projects throughout the world. Now, using a much more sophisticated and controlled methodology, (Glewwe, Kremer et al. 2009) find “no evidence that provision of textbooks in

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31 Think about the adage that there is no one more dangerous than he/she who doesn’t know that he/she doesn’t know.
Kenyan primary schools led to a large positive impact on average test scores, nor is there any evidence that it affected daily attendance, grade repetition or dropout rates.” Examples abound in all policy areas. What this suggests is the futility of seeking global “policy truth” that is based on a study or two or, even, five. For the example of textbooks, this suggests that while they are probably necessary, they are far from sufficient to make the broad improvements in school results claimed by some. Rather, their effectiveness most likely depends on a host of other factors such as the quality of the books themselves, how they are used by teachers and students, and how they are distributed within a country, across geographical and socio-economic strata.

1.97. What remains now that we have seen that the models of aid used over the past several decades have clearly run out of steam, and that the quality of the steam itself is called into question? The thread that runs through much of this recent work is that development comes from within: from good leadership, motivated and involved stakeholders, mechanisms for accountability of all actors (from the local and national leadership to the aid agencies), and respect for and mobilization of local knowledge and know-how. A corollary thread is the “contested nature of much of the knowledge about development” (Morduch 2008) and, therefore, that there is no “one” solution. Even problems that can be articulated in similar ways, such as the under-attendance of girls, may look very different when examined locally, implying that productive approaches need to be tailor-made to each local situation.

1.98. Although it would be an exaggeration to state that all educational development is local, we do need to recognise the extent to which it is intimately linked to the nature of local demand for education. This, in turn, may be linked to the understanding people have of the nature and utility of formal schooling. Even though we are pretty sure of the linkages between education and economic, social and personal development, our knowledge of how best to deliver education is weak. We need to recognize that the theoretical, scientific foundations of education are weak. There is no generally accepted learning theory. In medicine, when a competent doctor makes a diagnosis, there is a high probability that he or she can predict the outcome. We have no equivalent in education. Throughout the world, parents are concerned about the ascendancy of the values and teachings of the school over those of the family. Indeed, we trust more readily our bodies to doctors than our children to the school. As a result—which complicates the tasks of educators and education policy-makers—everybody is an expert on education. It suffices to have been to school oneself, or to have children in school, to be convinced of one’s expertise and have strong opinions. This is why educational issues become so political. And, as they say, all politics is local.

1.99. We have seen the extent to which “solutions” and approaches aimed at promoting EFA have tended to be top-down. The 2003 evaluation of aid to basic education stressed the lack of attention the development community has given to the importance of local solutions for the global effort for EFA. For FTI, the “indicative framework” that is used to appraise the educational plans countries submit for financing was established with little-to-no input from the countries themselves. Individual country plans and programmes may be
negotiated between the countries and their development partners, and their implementation is fully country-led, but the criteria used to appraise the plans/programmes were decided without adequate negotiation between the countries and their development partners. What we find, therefore, is that upstream — where the criteria for a country’s EFA plan/programme are determined; where policy orthodoxy is established—there is little country ownership. Further downstream, however, it is the countries that implement the policies, which they tend to do realistically with appropriate adjustments to the initial, FTI and donor approved policies. Nonetheless, this dissonance between the lack of ownership upstream, where policies are submitted to FTI, and full ownership downstream cannot be healthy for the quality of donor-country partnership, especially if we accept the idea that policy is as implementation does. Such dissonance can only reinforce Moyo’s (2009) assessment that the donor-country relationship is dominated by a good degree of cynicism that promotes a corrupt relationship.

1.100. Rather, what we can take away from this analysis is the extent to which context matters and will determine the fate of any educational plan and inputs. We assign broadly inclusive meaning to context: it includes not only the local conditions (e.g., are the teachers able to use the textbooks? will the books be delivered and distributed as intended? can children use them in their homes? etc.), but also the local know-how and knowledge that need to be factored into the policy equations. Yes, this can get messy, it can take time to resolve the varying points of view. On this, we would do well to listen to (Fullan 1999) when he points out that educational “reform on a large scale depends on the development of local capacity to manage multiple innovations simultaneously” and that “the notion that knowledge about change can be packaged and delivered is absurd.” He acknowledges that the chaotic nature of education systems means that sustained change must come from the grassroots.

Outcomes of the EFA movement

1.101. The previous section focused on inputs, including the role of policy. At the end of the day, however, the outcomes of the EFA movement will have to be seen in terms of enrolments and learning. That day, however, has become a moving target. In the beginning, in 1990 at Jomtien, it was the year 2000; at the Dakar conference in 2000 it became 2015. These days, there is broad recognition that the day of “mission accomplished” for all six objectives is not likely to be met in 2015 for five of the eight regions of the world.

1.102. We focus on enrolments, primary school completion, and learning outcomes, which are the official, and most quantifiable objectives of EFA. However, there have been collateral outcomes of real value: education statistics have improved; we now have reliable data on learning achievement, literacy and financing in many countries; analytical, 32

In a private communication, one of the World Bank’s leading education specialists at that time points out that these were “stretch goals that were designed not necessarily to be reached, but to stimulate extra efforts.”
monitoring and evaluation capabilities have improved; there have been numerous books, films, reports and articles on the pursuit of EFA and basic education. However, there have also been unintended consequences and perverse effects: in many countries, the focus on EFA has taken attention away from the fact that education systems also include secondary and tertiary subsectors, leading to disinvestment in higher education;\(^{33}\) the global effort has tended to spawn global, relatively technocratic “solutions” at the expense of local ones.\(^{34}\)

1.103. A close reading of the GMR reports from 2000 and 2010 provides a rough idea of: (i) whether the EFA goal had been met before 2000, and (ii) the likelihood of it being met by 2015. Although quality is an issue worldwide (and is likely to be so for as long as schools exist), the EFA goals have been met in Europe and North America and are likely to be partially attained by 2015 for the Latin America and the Caribbean (LAC) and Central Asia and Central and Eastern European regions. On the other hand, Sub-Saharan Africa, the Middle East and North Africa, and the Asian regions are more likely not to reach the goals by 2015. Of course, there is much variation within regions, and each region has countries that have already reached the goals and/or are likely to do so by 2015.

1.104. The most recent UNESCO EFA Global Monitoring Report (UNESCO 2010:41) finds that the good news is that there is “unequivocal evidence that the world is moving in the right direction, with many of the poorest countries registering impressive advances on many fronts.” The bad news, however, is that “on current trends, progress towards the Dakar goals is far too slow to meet the 2015 targets.” One reason for this pessimism may be the GMR’s finding that, based on evidence from household surveys, official education statistics may be underestimating the number of children out of school.

1.105. UNESCO’s latest GMR (UNESCO 2010) provides a thorough view of the status EFA, with indicators for each goal.\(^{35}\) Table 3, below, reviews EFA progress by geographical region since 1991 and Table 4 focuses on the extent of variability between countries within each region. The data in each table is based on the usual indicators used to monitor and assess the principal objectives of the EFA movement (see Annex 1 for a definition of these indicators and why they are relevant). The data in both Tables are based on UNESCO’s GMR Reports. Looking at variability within regions allows us to see the extent of divergence or convergence between 1999 and the latest data points (2006 or 2007, depending on the indicator) for countries on each indicator.

1.106. A close look at the evolution of the indicators (Table 3) over time confirms the GMR’s good news assessment that serious progress has been made when it comes to access. The bad news assessment, however, refers to the rate of change with respect to

\(^{33}\) A major reason for this was the World Bank’s reliance on rate of return analysis that showed higher rates for basic education than for higher education (Bennell 1996).

\(^{34}\) For critiques on “solutions” as problems, see Naudet (2000) and Pritchett & Woolcock (2008).

\(^{35}\) See Annex Table 12 of that GMR (pp. 412-419) for these indicators by country and region.
the 2015 target and the fact that the quality objectives are further from the objectives than the access indicators. This good news / bad news paradox begs two questions: (i) the effectiveness of designing and announcing global progress in a time-bound fashion that sets us up for disappointment; and (ii) the likelihood of attaining the objectives through policies that fall within the category of corrective measures. How much can be attained without moving on to more a more transformational approach? Also, as we have already seen, the state of progress varies significantly both with regions and across regions of the world: some countries and regions are more “on track” than others.

1.107. Several interesting points emerge from Table 3:
- Although the gross intake rate has progressed more for Africa than for the other regions, and even though Africa has higher gross intake rates than MENA and EAP, its net enrolment rate is still lower than the other regions. This suggests that drop-out and repetition rates are higher in Africa and/or the rate of overage students is significantly higher in Africa.
- The gender parity indexes less than 1 for Africa, South Asia and MENA indicate that girls’ access to schooling is still an issue in these regions. For LAC, it appears that it is the boys who are more likely to be out of school.
- External assistance to education is much higher for Africa than for the other regions. However, it is the EAP region where the highest proportion of external assistance goes to education.

1.108. A broad idea of the extent of the variability within the regions is provided in Table 4, where lower figures indicate more uniformity between countries. On this table, it is particularly interesting to see the how variability has changed over the two periods (1999 and latest). The European and North America regions have the lowest degree of within-region variability, meaning that there is relative uniformity between the countries on the indicators. We see that, on indicators of access and gender equity, the greatest degree of variability between countries is found in the SSA region, which is also the region with the lowest overall enrolment rate. When it comes to expenditures on education, variability has increased in SSA, LAC, and MENA, which suggests that educational growth in some countries in those will outpace that of others. Of particular note is that gender parity is uniformly improving in all regions except SWA. One implication of this analysis of variability between countries within each region is level of attention that the regions merit in efforts to attain the EFA goals. Higher levels of variability suggest room for cooperation between countries in that that those high on the indicators may have found “solutions” and approaches that could be useful to their (near) neighbours who are lower on the indicators. In any case, the extent of variability does suggest that caution be exercised before making region-wide generalizations.
### Table 3. Comparative EFA indicators

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Sub-Saharan Africa</th>
<th>LAC</th>
<th>South Asia</th>
<th>MENA</th>
<th>East Asia &amp; Pacific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross intake rate</td>
<td>82.4</td>
<td>90</td>
<td>115</td>
<td>112.4</td>
<td>119</td>
</tr>
<tr>
<td>Net Enrolment Rate</td>
<td>53</td>
<td>56</td>
<td>73</td>
<td>87</td>
<td>92</td>
</tr>
<tr>
<td>Primary school completion rate</td>
<td>-</td>
<td>58</td>
<td>-</td>
<td>-</td>
<td>90.8</td>
</tr>
<tr>
<td>Gender parity index, Basic ed</td>
<td>0.84</td>
<td>0.86</td>
<td>0.90</td>
<td>0.97</td>
<td>0.97</td>
</tr>
<tr>
<td>% GDP to Ed</td>
<td>3.5</td>
<td>3.5</td>
<td>4.5</td>
<td>3.4</td>
<td>4.9</td>
</tr>
<tr>
<td>% Govt Budget to Ed</td>
<td>14.6</td>
<td>-</td>
<td>17.5</td>
<td>13.5</td>
<td>15.7</td>
</tr>
<tr>
<td>% GDP to Basic Ed</td>
<td>-</td>
<td>-</td>
<td>1.8</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>% Govt Bud to Basic Ed</td>
<td>-</td>
<td>-</td>
<td>46.8</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>External financial assistance to ed (Millions US$)</td>
<td>-</td>
<td>2 686</td>
<td>3 630</td>
<td>-</td>
<td>605</td>
</tr>
<tr>
<td>% of all external financial assistance that goes to ed</td>
<td>-</td>
<td>12</td>
<td>10</td>
<td>-</td>
<td>7</td>
</tr>
</tbody>
</table>

(-) indicates that data are not available

**Sources:**
- latest: *Education for All Global Monitoring Report* 2010
Table 4. Variability between countries within regions on selected EFA indicators*

<table>
<thead>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross intake rate</td>
<td>27.6</td>
<td>31.7</td>
<td>13.6</td>
<td>16.4</td>
<td>19.2</td>
<td>10.9</td>
<td>18.1</td>
<td>16.2</td>
<td>11.4</td>
<td>18.1</td>
<td>3.5</td>
<td>10.1</td>
<td>8.1</td>
<td>4.3</td>
<td>3.2</td>
<td>5.1</td>
</tr>
<tr>
<td>GER</td>
<td>29.6</td>
<td>21.7</td>
<td>11.9</td>
<td>9.7</td>
<td>33.1</td>
<td>10.6</td>
<td>20.7</td>
<td>16.6</td>
<td>6.5</td>
<td>13.8</td>
<td>0.8</td>
<td>7.0</td>
<td>4.6</td>
<td>3.0</td>
<td>5.8</td>
<td>5.5</td>
</tr>
<tr>
<td>Survival rate to last grade of primary school</td>
<td>20.8</td>
<td>17.4</td>
<td>14.1</td>
<td>12.4</td>
<td>10.2</td>
<td>13.3</td>
<td>13.4</td>
<td>15.2</td>
<td>17.6</td>
<td>14.4</td>
<td>4.1</td>
<td>5.0</td>
<td>2.1</td>
<td>1.7</td>
<td>3.3</td>
<td>3.3</td>
</tr>
<tr>
<td>Gender equity index, basic education</td>
<td>0.24</td>
<td>0.20</td>
<td>0.11</td>
<td>0.10</td>
<td>0.14</td>
<td>0.21</td>
<td>0.20</td>
<td>0.17</td>
<td>0.16</td>
<td>0.10</td>
<td>0.11</td>
<td>0.07</td>
<td>0.02</td>
<td>0.04</td>
<td>0.07</td>
<td>0.04</td>
</tr>
<tr>
<td>% GNP to Education</td>
<td>1.9</td>
<td>2.1</td>
<td>1.8</td>
<td>2.5</td>
<td>1.0</td>
<td>2.0</td>
<td>1.9</td>
<td>2.1</td>
<td>2.9</td>
<td>1.9</td>
<td>1.4</td>
<td>1.1</td>
<td>1.0</td>
<td>0.9</td>
<td>1.3</td>
<td>1.3</td>
</tr>
<tr>
<td>% Govt expenditure to Education</td>
<td>6.5</td>
<td>4.8</td>
<td>3.6</td>
<td>4.1</td>
<td>2.5</td>
<td>3.3</td>
<td>5.6</td>
<td>7.4</td>
<td>5.9</td>
<td>4.0</td>
<td>5.5</td>
<td>4.1</td>
<td>2.1</td>
<td>3.1</td>
<td>2.8</td>
<td>2.5</td>
</tr>
<tr>
<td>% Govt education expenditure to basic</td>
<td>7.8</td>
<td>12.2</td>
<td>8.0</td>
<td>9.5</td>
<td>n.d.</td>
<td>13.0</td>
<td>n.d.</td>
<td>3.3</td>
<td>7.4</td>
<td>10.4</td>
<td>n.d.</td>
<td>5.0</td>
<td>n.d.</td>
<td>7.4</td>
<td>5.4</td>
<td>5.2</td>
</tr>
</tbody>
</table>

Source: Calculated from UNESCO GMR statistical tables
* Unweighted standard deviations are used as the measures of variability.

a Only countries which have 1999 data
1.109. The special theme of UNESCO’s 2010 GMR is “reaching the marginalized.” This is most appropriate as it now appears that the EFA movement, twenty years after Jomtien, has reached the stage of having to address the challenges that remain.

1.110. Since girls account for a major proportion of the out-of-school youth, their absence has been, and still is, a major aspect of attaining EFA. The Gender Parity Index (GPI) for primary education, for example, is the ratio of girls to boys in primary schools. At the beginning of the EFA movement, in 1991, this ratio was at .87 for the developing countries and .99 for the developed countries and those “in transition”. By 2007, the ratio stood at .95 for the developing countries with improvements of 6 percentage points for SSA and 18 points for SWA. These significant improvements were the result of policies decided by committed leadership, often against the grain of traditional attitudes.

1.111. Advocacy played a major role in influencing policies and leadership in Africa where the Forum for African Women Educationalists (FAWE) was founded at the beginning of the EFA movement, in 1992. Working in partnership with donor agency representatives of the Donors to African Education (DAE; later to become ADEA), FAWE membership was initially limited to woman ministers. Their action was focused on convincing both African leaders and the donor agencies that achieving EFA required commitment and a strong effort in the direction of girls’ education. FAWE subsequently branched out in the direction of promoting demonstration schools and working through a network of national chapters. In this, FAWE has been successful in keeping the issue of girls’ education high on the agenda of both national leaders and their international development partners. The importance of these efforts in achieving clear improvements in Africa’s GPI cannot be overstated.

1.112. The Policy Action Group for Learning has commissioned studies examining the progress of the EFA movement in Africa, South and West Asia, Latin America and the Caribbean. These studies have focused on the issues of access, gender, learning assessment capabilities, the status of teachers, policy and governance matters, funding, challenges and new approaches. They confirm the observations in the preceding paragraphs. (See Background papers page 6 for a list of these studies, which can be found at www.paglearning.org.)

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37 84 in SSA; .77 in SWA, .79 in MENA; .99 in LAC; .95 in EAP.
**PART 2: Building a global architecture to promote effective EFA**

2.1. Part 1 presented an analysis of the current state of EFA, its achievements and failings, its advances and inadequacies. It now behoves us to move from an analysis and an assessment of the past into suggestions for meeting the remaining challenges of EFA. Part 2 proposes the development of a new architecture that is composed of elements or modules. In some respects, this represents a new departure, all the more needed since EFA appears to have reached a plateau — in terms of its quantitative objectives, as well as its capacity to attract new resources. The ten elements address both of these factors and are presented as a whole, with clear complementarities between them. In order to break out of this plateau we propose: (i) an emphasis on transformational policies and lifelong learning, coupled with; (ii) new approaches to international assistance for EFA that focus more on assets than on deficits and pay more respect to country expectations, rights, needs, capacities and knowledge.

**Element 1: Moving from corrective to transformational policies**

2.2. Our analysis of status quo and corrective policies revealed that both are based, albeit to a varying extent, on cumulative and reductionist strategies for EFA. The differentiation criteria used for the typology in Part 1 do not allow for drawing a distinction between the corrective policies that lean more towards status quo and those that are more radical. By conducting a more in-depth review, we can identify reform initiatives that represent pathways of opportunity for transformational policies. To offer up examples of transformational opportunities revealed by certain reforms under corrective policies, we will examine the following cases (also see Table 1 in Part 1):

- the "escuela nueva" initiative in Latin America and the Caribbean;
- the Bangladesh Rural Advancement Committee (BRAC) in South and Western Asia;
- the "virtuous circle" policy in East Pacific Asia;
- the policies for school fee abolition and linguistic and cultural commitment in sub-Saharan Africa.

2.3. Cuba is a prime example of such a systemic reform that focuses on the inclusion of the marginalized and disadvantaged and comprises, among other things (Gardner 2009):

- Mobilization and motivation of the country's student and teaching populations to fully eliminate illiteracy;
- The targeting of and support for the disadvantaged;
- Customised work schedules and rhythms to enable everyone to learn;
- Near-free education services;
- Early childhood health care and protection facilities and a prohibition on child labour;
- Transformation of military bases and police stations into education and training facilities;
- Definition and application of high quality standards for teacher training as well as for all areas of the educational system;
• Development and promotion of educational methods targeting the development of critical thinking and the use of all intellectual, physical, manual and moral faculties with the aim of ensuring the health of all active citizens, efficient producers and people in general;
• Assigning physicians to schools in order to complement the introduction of public health services in all communities;
• Nutrition programs in all schools;
• Adoption of child-centred methods by schools.

2.4. The results are remarkable. Not only has Cuba attained universal basic education, but “even elementary school pupils from rural areas seem to learn more than pupils from middle-class urban families in the rest of Latin America” (Carnoy 2007). These policies mesh well with the vision of EFA reaffirmed at Dakar, namely to "promote EFA policies within a sustainable and well-integrated sector framework clearly linked to poverty elimination and development strategies." They also illustrated their fecundity in the field, not only in Cuba but also in Finland and other countries.

The escuela nueva initiative in Latin America

2.5. Founded in 1975 in rural schools in Colombia's coffee production zone, the escuela nueva initiative rested on a highly creative educational model targeting disadvantaged populations in rural environments. Twenty thousand schools in Colombia were involved, and it was introduced in fourteen Latin American and Caribbean countries.

2.6. The Escuela Nueva initiative did not have an intersectoral approach, and although it was implemented with the active participation of the communities involved, it did not considered adult and lifelong learning education. Nevertheless, it definitely holds some basic characteristics of the transformational policies type as described above, such as its clear orientation towards equity targeting to benefit disadvantaged rural children. The initiative was an urgent response to a social need and met the right to education of this population, while adopting an expectations approach.

2.7. The escuela nueva initiative brought education to dispersed populations and remote communities. Children received a comprehensive primary education cycle through the use of multiple-grade classes. The programs, learning material, pedagogical strategies and school and class organization are designed and structured to promote self-learning (problem-solving approach and individual exercises), learning with peers (collaborative work and group activities), and learning with family and the community (home support for homework and values-based education). In addition to school learning and a values-based education,

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38 Carnoy (2007) identifies for factors that contribute to the performance of the Cuban education system: appreciable state-generated social capital in the form of income equality; teacher capabilities; teacher education that is tightly coordinated with the curriculum; instructional leadership is important and market incentives are no substitute for good management.

39 Para. 8 of the Dakar Framework for Action.
the "school government" allowed for initiating learners to the exercising of rights, duties and obligations by citizens and their leaders at the school level, where it was organized and run as a "miniature city". The result is a true democratic approach to choosing student-leaders on a program basis and an obligation for all those elected to report back to their electors during the exercise of their mandate.

2.8. The targeting of rural zones was ensured, in addition to multiple-grade classes, by adapting a portion of the curriculum to the specific needs and limitations of the local environment. The flexibility of the school calendar and the pace of schooling enable them to co-exist with rural activities. For example, the school year was designed according to the rural lifestyle, and schools were closed during those periods where families most need their children to help out with agricultural activities. Regardless of the reason, children are able to absent themselves from the classroom and resume their learning where they left off when they return. Each child progressed at his/her own pace and was evaluated accordingly, moving up to the next level at any given time, insofar as it was justified by his results.

2.9. In certain Latin American countries, alternative classes have been created in or outside of the school setting, specifically for overage children or children who are behind. These classes incorporate accelerated support and/or catch-up programs to enable the children's reintegration to the system. Parents and communities play an active role in school life and management, which has a positive impact on the democratization of their associative organization and intervention methods. In certain circumstances, literacy and training programs are provided to help them better manage the schools and associations, or to facilitate their involvement in values-based education, the implementation of school nutrition programs, the promotion of hygiene and health, environmental protection, etc.

2.10. The escuela nueva initiative has drastically reduced the grade-repetition rate and the drop-out rate, while also significantly improving the learning results of students and the social life in rural communities. The factors germane to the success of the escuela nueva initiative include:
   - adaptation of the schooling model to the rights, needs and conditions of rural zones;
   - a focus on the success of everyone through a flexible learning pace that allows individuals to progress according to their own abilities while following various learning methods;
   - teaching media, organizational procedures, and varied pedagogical processes structured on the basis of learning needs;
   - ongoing teacher training by means of regular internships, training networks and nearby pedagogical support mechanisms;
   - the active participation of communities, due to their enormous potential for local adaptation and for modifying traditional systems.

2.11. The systematization of reforms and innovations implemented by the escuela nueva along with its extension to all disadvantaged groups, including children from poor urban zones and illiterate youth and adults, would herald the coming of a major process for
change. Should all of its elements be in line with economic and social development strategies, the _escuela nueva_ initiative would no doubt enable a qualitative shift towards transformational policies.

**The BRAC model in South and Western Asia**

2.12. In Southwest Asia, NGOs such as the Bangladesh Rural Advancement Committee (BRAC) have created informal basic education programs that target children and youth with no schooling (aged 8 to 24), the poor, the unemployed, ethnic minorities and children with special needs (particularly women and girls). The objectives of BRAC are to offer disadvantaged populations a quality basic education or, at the very least, opportunities equal to those available in the more privileged zones. The approach is holistic, incorporating basic programs in economics, social sciences, education, health, human rights, as well as legal services to help the fight against poverty and to empower the disadvantaged. It is delivered through education programs:

i) informal primary education for disadvantaged children;

ii) preschool programs to prepare children aged 5 or older for their first year of primary school;

iii) adolescent development programs addressing topics such as professional skills, leadership, health and nutrition, all with the objective of procuring youth a better quality of life;

iv) comprehensive community learning centres offering computer equipment and making ongoing training available to community members;

v) support for secondary schools, through enhanced teacher skills and pedagogy as a means of improving education quality.

2.13. The underlying pedagogical principles of BRAC favour group activities, local cultural media (storytelling or folk tales, legends and stories), thematic exchanges and discovery tours. Bilingual schooling is ensured by initially adopting the first language of students (namely, the one spoken locally), then beginning a transition to Bengali, the official language of instruction. Program objectives target the mastery of key basic skills, life skills and ICTs, and promote being well-read, gender equality and professional literacy.

2.14. Monitoring and evaluation includes both quantitative and qualitative dimensions. It is implemented through systematic and comprehensive mechanisms for the supervision and coordination of the local levels, up to the national level.

2.15. Families and communities are involved in a number of areas, including:

- the planning of preschool and school activities and operations;
- school administration, through parent forums and establishment management committees;
- monthly parent meetings designed to strengthened their role in student learning;
- management of libraries and comprehensive community learning centres.
2.16. BRAC's results are quite astounding: 93% of primary students move on to secondary school; the drop-out rate is 6%, compared to 32% in Bangladesh's public schools; women account for 97% of BRAC teachers; and girls have been promoted in impressive numbers.

2.17. BRAC has also shown that in-depth cultural changes are possible: poor rural families focused on their children's education; traditional families were in favour of the education of women and children; locally recruited teachers with modest salaries are motivated and committed to the success of their students...

2.18. BRAC’s success factors include, among others:
- the program's holistic approach;
- targeted strategies for disadvantaged populations, notably women and girls from the most marginalized rural environments;
- an investment strategy that limits salary expenses to 40%, which allows for adequately covering other needs (equipment, teaching media, rural libraries, employee training, evaluations,...);
- significant community participation.

2.19. BRAC's main limitations, which prevent it from being rolled out on a national scale (BRAC schools account for 10% of all schools in Bangladesh) and inhibit its transition towards transformational policies, are linked to the nature of the initiative (NGO rather than a State impetus) and the dominance of external funding.

The "virtuous circle" in East Asia/Pacific

2.20. In East Asia/Pacific, the search for the "virtuous circle" led to policies centred on a narrow link and significant interaction between education, the fight against poverty and economic growth. Based on the notion that knowledge makes a difference, development strategies were elaborated based on an expansion of knowledge, skills and innovation abilities through education. Educational reforms kept up the pace of development phases, adapting to the labour market, economic and societal demands. The first priority consisted of a fast-track mechanism in favour of literacy and primary education for all, notably made possible by a low-cost approach characterized by modest salaries, inexpensive learning materials, and/or high student/class ratios. A concerted effort was subsequently made to focus on quality. Public funding followed these priority choices. In 1965, for example, Singapore dedicated 58% of its education budget to primary education. This figure was 66% for both Korea and Thailand. Poor families were exempt from paying school fees. Investments in quality improvement were first channelled to those schools that had the least.

2.21. These policies had a positive impact on economic growth and the fight against poverty, which in turn allowed for mobilizing greater resources for education and further enhancing educational reforms, based on economic and labour market changes. This virtuous circle led to the development of strategic educational policies for the implementation of an ongoing learning environment, the creation of a critical mass of human capital, the promotion of learners, and the building of knowledge-based economies and societies.
2.22. The initiative’s success factors rest on:
- a strong political will and shrewd national leadership;
- the ability to obtain a national consensus on difficult reforms and economic growth favouring the poor and based on viable cooperation between the State and civil society, including unions and the private sector;
- top-quality public institutions;
- a broadened notion of education based on interactive links with the economy, learning through action, and adapting to specific needs at each phase of development.

Abolition of school fee abolitions and linguistic and cultural policies in Africa

2.23. Two of the major obstacles to successfully achieving EFA in Africa are extreme poverty and poorly adapted linguistic policies. To address the issue of poverty, policies for the abolition of school fees were introduced in various countries, among them Cameroon, Ethiopia, Ghana, Kenya, Lesotho, Malawi, Mozambique, Tanzania and Uganda... The objectives of these policies usually included the lifting of financial barriers to school access for children from poor families, but without necessarily being focused on this element.

2.24. Success factors are contingent on:
- the commitment of the highest level of political leadership;
- mobilization of resources and the ensuing planning to ensure financial sustainability;
- communication and dialogue strategies for building a national consensus and partnerships with the civil society and target communities;
- actions to enhance the quantitative supply and quality of school inputs and the teacher pool.

2.25. These policies must be integrated to broader reforms as well as education sector reforms:
- fight against poverty;
- accountability of communities and actors in the basic education sector through the decentralization and direct funding of schools:
  ▪ improved targeting of the marginalized and disadvantaged;
  ▪ revision of curricula and learning/teaching methods.

2.26. The fees targeted by the school fee abolition initiative generally include enrolment fees, the costs of learning manuals and media, fees for uniforms, and fees for school and extracurricular activities. Various planning and implementation strategies have been adopted, running the gamut from the Big Bang to preliminary test runs.

2.27. Policies for school fee abolition proved strong levers in fast-tracking access to education. The increase in enrolment rates (the first year) and primary enrolment rates (the year after fees were abolished) are a testimony to the initiative’s success. These rates, for example, respectively rose by 50% and 26% in Cameroon, 75% and 11% in Lesotho, 43% and 23% in Tanzania, and 29% and 23% in Ethiopia. Otherwise, policies for school fee...
abolition have given rise to significant concerns in terms of their sustainability and their impact on learning quality.

2.28. The second obstacle concerns language, and can call into play serious issues with regard to learning, identity and development. The problem can be summed up by the following question: “How can learning in the areas of written communications, mathematics, empirical sciences, life skills and more be initiated and attained in a language that is not understood?”

2.29. In the vast majority of African countries, the language of the colonizing countries was imposed as the language of instruction, in spite of it not being spoken by the vast majority of illiterate persons and their children. At the other end of the spectrum, the languages spoken locally are often not significantly transcribed, developed and conceptually enhanced to enable adopting them as languages of instruction, particularly given the current status of knowledge and competencies. In light of these circumstances, most African countries are wary about the choices to be made. This is exacerbated by the system's promotion of the educated elite currently in positions of authority.

2.30. However, as in Tanzania and Ethiopia, some African countries have resolved to adopt radical policies, by deciding to:

- Make local languages the first language of instruction, in formal schools as well as for literacy and informal education, to subsequently move to a bilingual instruction, including the ex-colonial language, first as a subject matter and later as a language of instruction;
- Begin to develop national languages by standardizing structural elements while enhancing vocabulary, terms and phases, particularly for new scientific and technological concepts, and ensuring the production of reference documents (lexicons, grammar, dictionaries and spelling guides);
- Develop a pedagogy for the teaching of these languages: curriculum and support reforms, course manuals, books and other learning and training media, teacher training and reskilling, evaluation and certification systems;
- Support research and other promotional activities in relation to these languages, through the introduction of funding and dedicated academic establishments;
- Develop a literary environment in these languages in the public and parapublic sectors (administration, public health and other services, banks) and in society and target communities (publishing, libraries, press...).

2.31. These policies were greatly responsible for improved access to basic education by the poorest members of society including linguistic minorities, as well as for more successful learning, including the learning of a second language. Even in those instances where these policies require additional funding, they are cost-effectiveness. Table 5 provides an indication of the cost-effectiveness of language of instruction policies and an their impact the learning of the second, “official" language.
Table 5. Impact of language of instruction policies

<table>
<thead>
<tr>
<th>Measures</th>
<th>TM</th>
<th>SM1</th>
<th>SM2</th>
<th>SM/AM</th>
<th>AM1</th>
<th>AM2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree of cost-effectiveness</td>
<td>+ low</td>
<td>very low</td>
<td>low</td>
<td>average</td>
<td>good</td>
<td>good</td>
</tr>
<tr>
<td>Expected scores on so-called official language tests (2nd language)</td>
<td>20/70</td>
<td>30/70</td>
<td>40/70</td>
<td>50/70</td>
<td>60/70</td>
<td>60/70</td>
</tr>
</tbody>
</table>

Source: Heugh (2006)

TM = traditional model based on use of ex-colonial language
SM1 = subtractive model with very early elimination of first language (around the second year)
SM2 = subtractive model, with early elimination (around the fourth year)
SM/AM = combination of subtractive and additive model (elimination around the sixth year)
AM1 = additive model, with very late elimination of the first language (at the end of or well after primary)
AM2 = additive model with no elimination of the first language

2.32. Improved learning outcomes observed for bilingual educational models can be associated with several factors:
- higher cognitive abilities in the languages spoken by learners;
- the higher self-confidence of learners when initial schooling is in their mother tongues;
- greater opportunities for learners to take the initiative and actively participate;
- the inclusion of new constructivist, social constructivist and consciousness-raising pedagogies;
- the contribution of the skills acquired in the first language to learning in the second language.

2.33. These policies also:
- Made it easier to include local knowledge and cultural history in the curricula;
- Favoured the development of interactive relations and synergy between schools and their environment, between schooling and literacy, and between school education and family education.
- Shed a more favourable light on the endogenous potential for development.

2.34. Linguistic policies require a determined political leadership with a clear vision that is widely shared and supported by a national consensus. However, they are often poorly linked with development strategies and opportunities (for example, an endogenous approach and a concrete fight against poverty).

2.35. This brief overview of radical reforms that break with the past is but a small portion of those that exist. The primary objective in discussing them is to illustrate their significant potential for innovation while helping us understand that they cannot by themselves be responsible for the qualitative transformation leading to EFA. In particular, it also allows us to identify and analyze the factors that, together, promote the replacement of corrective, cumulative and reductionist policies by transformational policies. In this regard, certain
elements are key to the reforms reviewed or at the very least, present in the vast majority of them:

- A strong political will and a national leadership committed to EFA, that sets priorities, decides on difficult reforms, decides on the resource allocation, and coordinates government efforts accordingly;
- Policies that are clearly focused on gender parity in terms of opportunities, planning, investments, funding, target strategies, positive discrimination, and the development of favourable environments;
- A holistic approach to reforms and the mobilization of all stakeholders to enable implementation and consensus necessary for solid institutional partnerships and communication frameworks;
- A global and sustainable concept of quality learning for all which is closely linked to notions of equity, equality and diversity;
- Close association of the implementation of quality learning for all with development strategies and programs to fight poverty, necessary to meet economic and societal demands as effectively as possible;
- An approach that views basic education as the foundation for lifelong learning which is the basis for building learning societies;
- Development of learning communities and literate environments at a local level, through the mobilization and association of educational and training resources from schools and the surrounding environment;
- Due consideration for the dual necessity of local roots (know-how, culture, languages and traditions) and an openness to the world (universal rights and freedoms, science and technology, globalization).

2.36. We will seek to better understand and draw links between these elements by exploring policy visions and orientations, approaches and concepts, as well as through research and debates on education in support of fundamental changes. This process is part of our search for strategic answers likely to offer a suitable framework for the requirements associated with successful EFA. Our focus will involve the following orientations: the promotion of a holistic and praxis approach; and a correspondence between gender equality and equity at the core of policies;

**Element 2: Based on experience, constructions are holistic**

2.37. Our architecture is about whole structures that do not suffer fragmentation well. This has implications not only for the structures of the educational system itself (such as primary, secondary and tertiary levels), but also for how we go about knowing how it works and how to make it work more effectively.

2.38. Since Jomtien, international attention and efforts have focused on basic education for all. Two justifications have been advanced for this: (i) basic education is a fundamental human right and we need to make all efforts to ensure that nobody is excluded; and (ii) investment in basic education is one of the most effective ways of insuring economic growth,
with high social rates of returns and externalities such as better health, self-employment, and more moderate demographic growth rates (especially as a result of educating girls). A third justification, highlighted by the 2002 GMR is based on the capability approach developed by Amartya Sen (1999), where education is intrinsically valuable because it provides people with the freedoms that make their lives valuable to themselves and their communities and polities. Regardless of whether we retain justifications that are more or less moral and/or instrumental in their nature, the importance of education for personal and social development is now well accepted.

2.39. However, questions remain: What education? How much of what levels of education? What are the trade-offs inherent in investing in and planning for countries’ educational futures? Furthermore, we need to ask about the criteria used for answering these questions. Are they moral, economic, or what? There are no simple, easy answers to these questions. Nor should there be. Each country needs to answer them on the basis of its own national dialogue. Current wisdom has it that basic education for all satisfies both moral and economic criteria. It is in this context that we need to think about the holistic implications of education for individual development and for national development, as well as recognition that an education system goes from pre-schooling to post-graduate and beyond to lifelong learning.

2.40. Multiple cross-pressures continually remind us the extent to which the educational systems resist fragmentation. There are the pressures that push “upwards”. Individuals—and their parents—who succeed in primary education typically want to continue on to secondary education, and those who succeed in secondary want to go on to higher education. Throughout the history of mass education, we have seen these pressures in action and we are seeing it these days in countries that have attained high levels of primary education as a result of the EFA movement. Not satisfying the expectations created by these upwards pressures can create thwarted ambitions which lead to frustrations which, on a collective scale can create instabilities. We have seen many examples of unrest caused by increased barriers to higher education. However, access opportunities to higher educational levels have costs that are borne either by individuals and/or society. Furthermore, development requires both an educated base and educated elite capable of governing, managing, creating, being enterprising, negotiating with international partners and associates, defending the country’s interests, and much more.

2.41. The condition of any one level is dependent on others. For example, primary graduates with low levels of cognitive attainment will diminish the quality of secondary education; likewise for the relationship between secondary and higher education. Conversely, the quality of primary and secondary levels will suffer if the higher levels are not able to produce teachers in sufficient numbers and with the (subject matter and pedagogical) knowledge required to teach effectively. This could be seen as a downwards pull that

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40 The first UNESCO GMR of 2002 presents both the social rate of return analysis along with a short review of its methodological inadequacies.
creates pressure on the higher levels that are needed to ensure an adequate supply of quality teachers for the lower levels. In other words, an educational system is a fine illustration of the adage that “what goes around, comes around.”

2.42. The question, therefore, is often something like this: What is the right or best mix, where should the greatest efforts be made? Again, there are no simple answers to this; and no one universally right answer either. Furthermore, we need to think critically about the current wisdom that economic growth will be thwarted without basic education for all. Looking for answers also requires a holistic approach with respect to the sources of knowledge, experience and expectations. This means that thought needs to be given to the epistemological issues of how we know, the sources of our knowledge, and the knowledge we consider useful.

2.43. Certainly, it is important to learn from international experience. However, it is even more important to take into account national experience, expectations and knowledge on all aspects of educational development. The practice of development cooperation in education has undervalued local knowledge and underestimated its presence. In West Africa, for example, a closer look into university libraries and national reports revealed much more research than international experts and their institutions acknowledge (Maclure 1997; Maclure 2006). There is also extensive knowledge in experience that has not been systematically explored. When ADEA (Marope & Sack 2001) made a concerted effort to discover “what works” in education in Africa that has provided positive results, 26 countries provided information on over 40 interventions (policies, programmes, projects) in the areas of improving access, quality and capacity.

2.44. The ADEA experience demonstrates what (Ndoye 2000) calls the “praxis approach”, a variant of learning-by-doing. This process is primarily endogenous in that it focuses on the experience of the policymakers and their institutions. If much of the relevant policy knowledge is to be found where the practice is, within the existing context and structures, then effective policy formulation needs to empower this knowledge, which means developing strategies that enable policymakers to learn from it. It should also be noted that this approach is highly pedagogical in that it is based on the “exemplary value of success” (Ndoye 2000) — a concept well-known to teachers and pedagogues. Not only is it anchored in the environment in which the education systems are situated — an environment that largely defines the policy needs — but it is also based on positive reinforcement.

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41 Although it is often asserted that universal primary education is necessary for economic growth, looking at historical data back to the nineteenth century for 34 leading countries (Peaslee 1967) finds that a 10 per cent primary school enrollment rate was the threshold for those countries’ significant economic growth in the ensuing years. More recently, Botswana, which has had one of the highest, sustained growth rates in the world for the past 30 years, invested heavily in higher education (including bursaries to study abroad) while its primary NER actually decreased from 88% in 1991 to 84% in 2007.

42 As Berliner (2002) points out, “context is of such importance in educational research because of the interactions that abound.” In other words, what works in one context may not work in another where the interactions are different.
2.45. Focusing on how development agencies operate in developing projects and programmes, William Easterly (2006), a particularly astute observer of development assistance and former World Bank staff member, finds it useful to think of a dichotomy between “Planners” and “Searchers” which looks like this:

<table>
<thead>
<tr>
<th>Planners</th>
<th>Searchers</th>
</tr>
</thead>
<tbody>
<tr>
<td>determine what to supply</td>
<td>find out what is in demand</td>
</tr>
<tr>
<td>apply global blueprints</td>
<td>adapt to local conditions</td>
</tr>
<tr>
<td>at the top lack knowledge of the bottom</td>
<td>find out what the reality is at the bottom</td>
</tr>
<tr>
<td>know all the answers</td>
<td>admit they don’t know the answers in advance</td>
</tr>
<tr>
<td>believe that outsiders know enough to impose solutions</td>
<td>believe only insiders have enough knowledge to find solutions</td>
</tr>
<tr>
<td>have a rhetorical advantage of promising great things (solutions for ill-identified problems)</td>
<td></td>
</tr>
</tbody>
</table>

2.46. He finds that (i) development assistance that is dominated by “planners” is more of a problem than a solution, and (ii) the identification of local, grassroots solutions—often in the form of low profile outliers—is most likely to come from the work of “searchers”. This emphasis on research of existing “solutions” was the guiding principle of ADEA’s 1999 Biennale that adopted the “praxis approach” aimed at identifying activities, policies, projects, programmes, and/or experiences that worked and paid dividends within their respective countries. A holistic approach calls for searchers to prioritise knowledge derived from local experiences and integrate it into the overall knowledge environment that is used to develop educational programmes and policies.

2.47. Another dimension of a holistic approach is the nature of the partnerships where each partner has its own expectations. Although each partner may have its particular comparative advantage which it brings to the collective table, care must be taken to ensure that the ensuing division of competencies does not lead to a situation where individual partners play preponderant roles because their specific competencies. For example, the financing partner (finance ministry, international agency) is entitled to require accountability, but that does not mean that it is in a position to provide judgements on specific educational policies and programmes, or even to dictate the criteria of accountability. To do so would put that partner in the role of financial party and policy judge, thereby putting the educational sector in the position of double dependency.

2.48. This is one reason why proposals for a global fund for education are attractive (Sperling 2008). Such a fund, whose institutional culture would be built from scratch, could be better suited than the current multi- and bi-lateral institutions to work holistically — using
local solutions to locally defined problems; providing currency to local knowledge, all the while maintaining credible mechanisms for accountability.

**Element 3: Gender equity should be at the heart of transformational policies**

2.49. Gender equality and equality of learning opportunities are intimately linked. Both involve human, economic, social and cultural issues. Their objective — which is vast — involves a massive social transformation towards inclusive educational and social systems. They require a determined struggle against inequities and discrimination of all types that prevent the underprivileged and marginalized from asserting and exercising their rights to an equal social status, economic independence and political representation. There is a nearly unbreakable link between such ability and the right to quality education for all. In all respects, an emphasis on gender equality must be closely associated to the notion of equity, both as a means of disclosing instances of discrimination and inequity that prevail in society and as an access point for the focus and efforts necessary for their elimination.

2.50. Gender inequality is present at all layers and levels of society, affecting minorities, the poor, displaced populations, refugees... It is steeped in history, traditions and the collective unconscious. It can be latent or manifest, hidden or fully visible, brutal or subtle... If the female gender is cruelly impacted by this reality in education and other sectors, the struggle for the education of girls and women has the effect of identifying the specific problems encountered by boys and men, particularly those who are poor, disadvantaged and marginalized. It is also among the disadvantaged and underprivileged populations that gender-based discrimination is most prevalent. It is a combination of discriminatory factors that generate the inequities that most affect those who are excluded from the educational system.

2.51. It is critical that transformational policies focused on equity take all of these varied and complex elements into account. In doing so, they must first become fully aware of existing discrimination and inequity factors, then develop and uphold a strong and clear commitment to eliminating them. These factors must be identified, measured and located, and their means of replication understood. In addition to mechanisms and tools for preparing statistical tables, a comprehensive diagnostic requires targeted analysis and research in order to procure more in-depth and specific knowledge of the various types of disadvantaged and marginalized persons as well as the obstacles they must face. A careful identification of the specific problems to resolve in various circumstances constitutes the basic foundation for defining relevant and effective strategies.

2.52. It is necessary to understand that policies promoting equity are action policies that require political will. These policies must run counter to the "normal course of life", a direction that has only served to perpetuate the inequality that these policies are now seeking to correct. Action can initially be taken through legislative and regulatory bodies. There are countless inspirational stories, at a national and international level, concerning links between equal rights and education and the introduction of legal mechanisms for
countering the discrimination and inequity. The legal opportunity for every person to have this right validated in a court of law is a significant element to be considered, as is the potential support that civil organizations can bring to bear for victims embroiled in such legal battles.

2.53. Beyond their constitutional and legislative elements, policies based on political will are characterized by a focus on shrinking gaps in education. They adopt strategies for the correction of inequalities, based on a systemic inclusionary approach:
- Education planning designed to reach the most disadvantaged and marginalized;
- Equitable funding for education, hence providing more to those with less to encourage their participation and correct the factors hindering them;
- Reform of educational systems and programs with the aim of addressing the specific rights, needs, interests and circumstances of the disadvantaged;
- Recruitment, training and deployment of teachers and trainers attuned to existing inequities and introduced according to formulae favouring their correction;
- Revision of textbooks and other learning-teaching media to do away with all discriminatory stereotyping and promote identification models designed to uplift the social status of the disadvantaged;
- Orientation of the learning process towards critical thought and respect for alternative methods, in order to promote the breakdown of clichés, discriminatory beliefs and utterances, as well as to develop knowledge, skills and behaviour appropriate to the pursuit and exercising of human democratic rights and freedoms by everyone;
- Support for pedagogical choices while taking into consideration motivational differences, leverage mechanisms and learning methods;
- Promotion of learning environments that are free of violence and discrimination, accessible to one and all, and suitable for flourishing within a diverse setting.

2.54. The targeting strategies and positive action required to correct inequities can prove extremely complex. The dialectical links between differences and equality evoke thought, opinions and divergent if not contradictory projects. It is thus important to focus on respecting both the differences and the need for equality. Ignoring inequalities at the outset and pretending that all are treated equal (by offering opportunities that are identical rather than equal) is in essence consciously or not, the replication of inequalities. To attain its mission to promote equality, education must take careful note of initial differences and inequalities, and specific needs and circumstances. Only in this manner will it have a chance of appropriately promoting success for all.

2.55. Taking into account differences must not involve the hierarchization of values, nor their strict compartmentalization into specific and parallel slots. This would be a threat to richness that can come from the coexistence of differences. Rather, keep in mind that legitimacy of policies for equality. In other words, taking account of individual differences can be the basis for ensuring the success of all; this constitutes equal opportunities or equal rights to quality education.
2.56. Regardless of how relevant they may be, equity and gender equality policies cannot be confined to the education sector, for this may render them ineffectual with regard to their objective. The issue of discrimination often raises questions on the sources of social inequalities, the means by which they are expressed, and the factors supporting their perpetuation in the economic infrastructure, ideologies and social institutions. In light of these factors, the social mission of equality in education can only be attained if it is part of a larger movement based on multidimensional and multi-sectoral strategies. These strategies, from the perspective of government and ministries, as well as on a more international scale, must be transversal and focused on partnerships (including civil society, the private sector, decentralized local communities and target communities). The openness and quality of the dialogue necessary to build the required consensus, combined with the flexibility and efficiency of institutional mechanisms for cooperation, coordination and follow-up of actions, will become the critical factors for successfully developing and implementing intersectoral platform initiatives centred on:

- A societal shift in representation, opinions and behaviours based on discriminatory stereotypes and beliefs: media campaigns, public debates, advocacy, exhibits, publications;
- The promotion of affirmative action and empowerment policies for the most disadvantaged, which implies gender parity, legal protection, quotas, accountability and decision-making;
- And, especially, poverty reduction strategies that emphasize compensatory measures (nutrition, health, social protection) and socio-economic mobility (training, empowerment, improved income, employment and development of job opportunities) programs.

2.57. Transformational policies firmly focused on equity will need to be better and more efficient in terms of gender equality and the inclusion of drop-outs prior to critical levels being reached. It goes without saying that schools should not be a venue for discrimination. Nonetheless, there are often cultural and psychological factors that operate in favour of discrimination. Schools will often need to proactively work to overcome this. In addition to the cultural factors present in many societies, girls often have lower expectations for themselves when it comes to school-related success (Lewis & Lockheed 2006).

2.58. Simone de Beauvoir wrote that, “One is not born a woman, one becomes one.” She drew a clear distinction between innate anatomical and biological differences in sex, and gender which is a sociological concept associated with social relationships between the sexes, as propelled by the family unit, the social environment, religion and institutions.

2.59. This second, "social sex" or gender, she felt, was learned, hence socially developed. The ideology, at its core, calls for inverting the relationship such that the "socially developed" element becomes what is natural and thus innate. Social domination and cultural overkill then lead to a self-fulfilling prophecy phenomenon which engenders alienation, where the imposed circumstances become what is subjectively desired, often in the form of diminished expectations. In many developed countries and certain developing countries,
girls are ahead of boys as regards average length of schooling, average number of graduates, and examination scores.

2.60. In spite of their success, it has been observed that most girls choose literary or social streams, opt to train as teachers, or go on to attend paramedical or tertiary schools. They are still a minority in the scientific and industrial streams. The challenge consists of striving to understand their motivations and choices, particularly when we consider that their skills and academic results should direct them to more higher-status streams. The relationship between the presumed aptitudes and so-called "abilities" or "inabilities" based on traditional social and gender relationships no doubt goes a long way towards explaining these "choices" and the ensuing differences between boys and girls. This results in a need to incorporate career guidance mechanisms into educational and training which include information on gender or other forms of inequality or discrimination. These mechanisms should support all children, beginning in preschool and until the time of their insertion into the labour market. They must be integrated to children's personal development and their choice of curriculum, and provide opportunities to explore and exercise their full potential, identify their strengths and (real or imagined) weaknesses, investigate preliminary orientations, make informed choices, and approach their educational and professional orientation in as relevant a manner as possible. These mechanisms should eventually be bolstered by support systems incorporating exposure to success models, performance recognition and reward systems, bursaries, and quotas, to ensure that the disadvantaged are adequately represented in the scientific, technological and industrial streams.

2.61. The problem of boys dropping out before they have attained a critical level of learning must be addressed on two fronts: the scientific aspect related to gender, and the general aspect based on improving the retention capabilities of educational systems. The first aspect relates strictly to the schooling conditions of boys, and will require that each of the countries concerned specifically examine and assess the scope of the phenomenon and its causes with the aim of identifying appropriate options and strategies. While not necessary identical, these could converge with those adopted for girls. The second aspect may herald a larger general concern that goes beyond boys, to encompass everyone who has dropped out of the educational system early, i.e., without having achieved autonomous learning capabilities. Children and adolescents drop out of school for a variety of reasons, including conflicts and war, drugs, poverty and disease. Dropping out is currently one of the main causes of illiteracy (both functional and not). Formal educational systems are often inadequately prepared to welcome these individuals and meet their learning needs. History has shown, however, that these systems can be tweaked to integrate learning methods adapted to the rights and needs of children who are behind or need extra assistance. Some schools have implemented tutoring and mentoring programs to help children in difficulty or behind in their schooling. Others, in turn, have formed special classes with accelerated programs for over-age children or children with particular problems.

2.62. In spite of these success stories, the formal system appears ill-equipped to meet the needs of children who have dropped out because they had difficulty adapting.
informal educational models were tested in various countries, and appear better adapted, mainly due to their flexibility and their social and cultural proximity to the target population. For example, the community schools developed outside of the official system in West African countries have had good results and been successful in meeting the basic educational needs of this segment of the population. In such circumstances, equity requires that there be bridges enabling these students to reintegrate the formal system or complete their socio-professional insertion.

2.63. Transformational policies are attentive to the more subtle aspects of discrimination. They redesign systems accordingly, based on needs and circumstances and always focusing on the success of all learners. The ongoing concern consists of providing everyone with an equal opportunity, including those who are having a hard time attaining their learning potential and the others who are on paths that limits their potential.

**Element 4: Adopt an expectations approach nationally and internationally**

2.64. Even though the EFA goals are global, we have seen that the solutions are local. Demand is local, much policy knowledge is local, know-how is local, and implementation is clearly local. Based on the idea that EFA is a global public good, the expectations approach\textsuperscript{43} we put forward focuses on demand, on deep understandings of local situations, and respect for local knowledge and know-how. This has implications at both the national and international levels. It also has implications for the processes of education policy formulation.

2.65. This element of our architecture is designed to promote constructive engagement by all partners—all the way “down” to students and parents. It implies that expectations for inputs and outcomes have been negotiated and agreed by all concerned. Such an approach should increase the likelihood of attaining the EFA goals within a reasonable time period. The major components of this element include: participation by all concerned; the promotion of local and national leadership, and accountability with the assistance of reliable methods and measures of evaluation. However, we also need to recognise that education is a long-term effort and that it is difficult to judge its effectiveness through short-term results.

2.66. The idea here is to bridge existing divides. Education is full of them; they go with the territory. This is best understood by the relatively uncertain and messy nature of education where (contrary to medicine, for example) we do not have a body of irrefutable scientific underpinnings. Bridging these divides is a major task of educators and education policymakers: between student and teacher; between parents and schools; between schools and education ministries (for national education and/or federal systems); between school systems and their funders, such as taxpayers and/or financing institutions; and, of course, between the general public and its schools. Such divides exist because of varying expectations, often coming from diverging interests and inadequate communication between

\textsuperscript{43} Not to be confused with rational expectations theory in economics.
the different parties in the context of lack of scientific certainty. Education is a profoundly social phenomenon and, because of this, it is essential to open and maintain multiple channels of communication.\footnote{This is why ADEA established its working group on communication and education (Sack 1999).}

2.67. The divide between teachers and students is classic. Teachers expect students to learn, study and obey. Students’ expectations may not be well articulated by them, and vary greatly by age. By and large, they want to be motivated. A policy aspect of this divide is the relative importance given to “teaching the subject” compared to “teaching the student”. This has implications for curriculum development and, especially, teacher training. We know that teachers need to have an excellent command of the subjects they teach. However, if their pedagogical (i.e., communication or transmission) skills are weak, if they have no idea about how students can be motivated and learn (especially in the lower grades), then their subject mastery will not suffice to ensure effective student learning.

2.68. Another divide that needs to be addressed is that between the schools and their communities which, after all, provide the resources — including the students themselves! — but often, in highly centralised systems, have few opportunities for direct inputs into school governance. Depending on the specific circumstances and context, this relationship is crucial for the perceived legitimacy of schooling that affects many aspects, including demand, financing; and perceived relevance.

2.69. The divide between local and global knowledge about education is of particular concern for the international development cooperation community. This divide begs the question of the policy applicability of academically valid research conducted in one context for another. Generalisation is always an issue in the social sciences, for reasons related to methodology and context. Reasonable caution would suggest that whereas methodologies may be transferable from one context to another, results may not be. This suggests the need to focus on capacity building for educational research that includes training and, more importantly, sustained support for institutions that focus on research and the training of researchers.

2.70. And, then, we have the divide between the international funding agencies and recipient countries. Addressing this would require a renewal of the aid architecture that takes into account the FTI evaluation and the proposals for a new global fund for education. It would be necessary to ensure that all partners (aid agencies, recipient countries, NGOs, civil society, private firms and foundations…) are, indeed, full partners when it comes to decision-making and determining what constitutes usable knowledge. One implication of this is that all issues, from upstream criteria for appraisal and the elaboration of indicators to more downstream issues related to implementation and accountability would need to be fully negotiable between all partners.
2.71. In education, expectations run full circle and in all directions. All parties have their expectations and expect them to be taken into account. We need to understand this and integrate it into our work, wherever we may be working. We have suggested that they can create divides. However, they also challenge us to build bridges, which is a strategy for managing these divides. We see these bridges taking the form of improved communication, pedagogy and negotiations between all parties, and giving full currency to the knowledge, know-how and concerns of all others.

2.72. The advantages of developing an expectations approach are found in the resulting transparency, where interventions come from frameworks that are agreed and understood by all actors. Of course, this can be time consuming and appear chaotic at times. But, with increased participation and full accountability, policies and more specific interventions are more likely to work.

2.73. This approach takes on particular meaning within the aid relationship which is increasingly characterised by a donor-recipient relationship that is fundamentally unequal, ineffective and corrupting (Moyo 2009). The simple fact that “ownership” is a rarely attained objective is most revealing. All too often, the relationship has been characterised by a certain arrogance of those representing agencies whose power goes from its financial to its knowledge and analytical capacities, in the face of which their “client” countries express broad acceptance. The expectations approach would suggest greater modesty, especially when it comes to the value and usefulness of one’s knowledge and analytical capabilities that have ignored those of the recipient country.\(^\text{45}\)

**Element 5: Local solutions for a global movement: respect for context and solutions that come from within**

2.74. The centrality of local solutions for the global EFA movement sums up much of the previous analysis. Reliance on and the promotion of local solutions — and the knowledge and skills required to identify them — are the foundations of the new global architecture

\(^{45}\) An accidental finding in an evaluation of Finland’s aid to education is that there is an association between modest behavior of agency staff and country ownership (Sack, Cross et al. 2004).
required to attain EFA. However obvious this may be, it is important to reflect on why this has not been the case.

2.75. A major factor contributing to this has been the tendency of international development agencies to seek standardised approaches to their work. Generic policy papers on education — for the world or for a continent (Watkins 1999; World Bank, 1995 and 1999) — are an excellent illustration of this. It is always tempting to think globally, especially for large-scale international institutions addressing seemingly generic issues (e.g., increasing access, improving quality, and improving internal and external efficiency) across the world or a continent. Product standardization is generally thought to have efficiency benefits for large-scale organizations. However, as we have already seen, the educational issues, action, implementation, problems, and solutions are all local. Indeed, global approaches can have strong perverse effects. One internal World Bank study even demonstrated that, for lack of due consideration to dedicated information gathering and country-level analysis, there was an inordinate tendency for weaker education sector studies to rely on the recommendations of the Bank’s generic sector analyses (Thomas & Carnoy 1992). This makes bureaucratic sense, as the recommendations in those generic analyses have official sanction and can provide bureaucratic cover for staff who do not have the time or resources or inclination or know-how to develop country-specific analyses using locally produced analyses.

2.76. Another reason for this may be that just as there are differing analyses and opinions and proposals within recipient countries, different DPs also have differing approaches and preferences. This is illustrated in a recent (pre-earthquake) report on Haiti (OCDE & ACDI 2010) which states

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46 The importance of local knowledge and local, stakeholder inputs into policymaking processes is becoming increasingly clear in other development areas, such as agriculture (Ostrom 1995; Ostrom 2002). Ostrom (2002) points out that the preferences for more centralized policymaking has not been supported by research. Even the school district consolidation movement of the second half of the 20th Century in the United States has not had beneficial effects on school results. One result of this appears to be the rise of the charter schools movement. As Ostrom (2002:43) states, “During the heat of this policy reform effort, research was almost non-existent on the effect of school size, number of schools in a region, and related issues. It was such a simple solution to what was perceived by academics and public officials as an obvious problem that both were willing to push hard or this reform.”

47 One of the most astute analysts of educational change in the North American context, Michael Fullan (1999: 28) provides ample evidence and theoretical justification for the proposition that successful change and reform only come from within, using knowledge that may often be tacit. As he states, “the only shortcuts available turn out to be roads to superficiality and dependency.” Focusing more on the determinants of learning, Cohen, Raudenbush et al. (2003) develop a model where local, in-classroom knowledge plays the predominant role in determining the efficacy of resource utilization.

48 This was demonstrated by Schwartz & Sack (1996) for the World Bank; Samoff’s (1999) review of the education sector analyses from many agencies also noted the surprising uniformity of analyses and recommendations over many countries.
Haiti presents a complex set of problems relating to its context and history, which must be taken into account in the design of international interventions and development programmes. While there was agreement on the importance of contextual understanding, different stakeholders have interpreted the Haitian context in different ways. There are important differences of opinion within Haitian society (reflecting a legacy of divisions and exclusion), and between Haitian and international actors, which have so far prevented the emergence of a common vision of Haiti’s development priorities, and the direction and pace of change. These multiple readings of context, combined with a general failure to take contextual analysis onboard in the programme design and implementation, has led to a lack of coherence in intervention strategies. This suggests that impatience in the policy formulation phase may be the root cause for the failure to take context into account. This, in turn, begs three questions:

- What is the utility of a policy formulation phase if there is no prospect of sufficient agreement?
- Is it possible to move to action without a well elaborated policy?\(^\text{49}\)
- What prevents taking the time needed to reach a satisfactory level of consensus?

2.77. We need the global goals which, quite reasonably, are articulated in broad terms, such as the six EFA goals or the eight MDGs. We also need the global institutions in order to promote the goals and raise resources for them. However, there is no reason expect that we need global or standardised approaches when it comes to policy development and implementation. To the contrary: there is no way that one size could fit all when it comes to attaining educational goals in a broad swath of national, economic, political and socio-cultural settings around the world. Each setting must invent its own way forward and figure out what can be learned from other settings. This involves processes that are time consuming and that may appear chaotic at times. But, they are unavoidable.

2.78. This analysis suggests another reason to consider the establishment of the proposed global fund for education. The issue here is the extent to which the institutional cultures of the existing agencies are able to adjust to the specificities of the education sector. Most of the large financing agencies work in many sectors, such as public finance, public works, telecommunications, health, education, agriculture and more. This means that their policymaking processes, accountability norms and practices, incentive and reward structures, time constraints for product delivery, and other procedures (financial management, disbursement, procurement, personnel management) tend to be highly similar throughout the organisation and, therefore, for all the sectors in which it works. But, how realistic is it to dissolve the specificities of the education sector in the solvents of these multi-purpose agencies? For example, many agencies have time-bound constraints on the

\(^{49}\) One lesson drawn from a review done by ADEA of successful educational programs/activities in 25 SSA countries was that it is important “to not allow planning to arrest implementation” and that “not everything has to be in place before you can start” (Marope & Sack 2001:87-88).
delivery of their “products” (such as credits and projects) that are built into the organisation’s incentive structures. Often, a major indicator of implementation success for a project/programme is its disbursement rate. Because of its “messiness”, it usually makes little sense to impose time-bound norms on judgements about how an educational project is doing. Norms that make perfect sense for engineering projects such as road construction do not hold for education where — even when it comes to school construction with local community involvement — the processes involved often defy norms established for other sectors. An organisational structure designed for, and dedicated to the specific needs of education could well be a more appropriate and effective means for ensuring both EFA and a global, balanced approach to the development of education in the poorer countries of the world.

Element 6: Moving towards the concept of sustainable learning

2.79. The various learning, behaviourist, constructivist, socio-constructivist, humanist and cognitivist theories reflect the multiple modes of learning currently available. Learning opportunities are numerous: immersion, association, repetition, explanation, trial and error, imitation, networks. By going beyond biological adaptation, we see that human learning is first and foremost an ongoing social process where human beings get to know themselves through the fulfilling of their own potential, becoming socialized through enhanced relationships with others, the acquisition of knowledge, and the development of abilities and values to help them resolve the various problems they will face.

2.80. In line with EFA requirements, what is learning? Who is it for? How is it accomplished? And, what is its purpose? The notion of sustainable learning can prove useful in answering these questions.

2.81. But first, let us examine the concept of sustainability. To understand it in the widest sense, it bears considering the conceptual shift that has occurred, and which Paul Cappon (2004) describes as follows:

“Sustainability began as a concept that was primarily associated with the environment, according to which nature was to be harvested in a way that harmed neither its productivity nor its resilience. This concept has been expanded and now encompasses the social and economic infrastructure that determines a society’s capacity to maintain itself in a rapidly transforming global context.”

2.82. Let us add two ideas to this. This expansion also involves ethics, politics and culture, as we will shortly discuss. The capacity of a society which determines sustainability is today overly determined by education, which has acquired a central role in knowledge-based economies and societies. What is sustainable learning from such a perspective?

2.83. We first begin with a look at what it is not. Sustainable learning is the antithesis of short-lived learning, fragmented learning, ineffective learning, incomplete learning, inequitable learning... Also important is the notion that the factors influencing learning are not limited to the education sector. The complex political, social, economic and cultural
factors that impact learning and learning inequities have led sustainable learning to be fundamentally intersectoral.

2.84. Sustainable learning is characterised by its ability to ensure learning that is permanent, that is retained over time. This sustainability ensues from the way learning adapts to the basic rights and needs of the individual. This signifies that learning rests on real motivations and enables everyone to develop the knowledge and skills they need to live or survive in a given environment. In this report, the "contextualization" of learning constitutes an important dimension of its sustainability, as well as providing links between the educational and social processes.

2.85. Sustainable learning pertains to the flourishing of all human beings, and is thus multidimensional. It is learning that is both complex and global, and which bears on the cognitive, psychomotor and social and socio-affective areas of learning. It combines humanist and scientific-technological elements in the development of human culture. It is both theoretical and practical. It is rooted in the local identity (history, traditions, culture, languages and local knowledge) and open to the world (democratic universal human rights and freedoms, scientific and technological revolution, globalization).

2.86. For learning to be sustainable, it cannot be restricted within a predefined temporal framework. It is thus permanent and comprehensive learning that prepares people to understand, analyze, experiment and process the complex world and all of its quick, complex and profound changes. Sustainable learning is quality learning, meaning that it incorporates the notion of success for all: success in learning, success in continuing to learn, success in enjoying a better life, success in working better, success in further participating in the development of society...

2.87. In terms of initiatives, sustainable learning favours the development of people's full intellectual and manual, mental and physical, and individual and social potential. It notably meets the four pillars of learning as defined in UNESCO's Delors report (Delors & et al. 1999): learning to know (a passport for learning throughout life), learning to do (individual or group problem-solving approaches), learning to be (independence, judgment and accountability), and learning to live together (family, neighbourhood, community, nation, world). Sustainable learning combines the excellence of the knowledge and skills acquired and the individual and societal transformation of quality by preparing learners to continue evolving and enhancing their knowledge.

2.88. Intersectoral approaches and collaborative initiatives ensuing from sustainable learning are dependent on the openness of education actors to other sectors. This requires foregoing reductionist schooling methods and building new learning partnerships with actors from other sectors, while taking into account the diversity of projects, expertise and the roles required in each function. In such a case, intersectoral action is occurring at the international, national, regional, local and community levels. It takes on various public and non-public forms, existing in horizontal or vertical systems, as working groups. Promoting it depends on the vision of learning, the innovative spirit, the quality of the dialogue, and the
efficiency of the mechanisms and frameworks introduced to ensure joint and concerted decision-making processes and action.

2.89. To exist, sustainable learning must include notions of equity and equal opportunities for everyone to succeed. Such success requires targeting the disadvantaged and marginalized, as indicated above. Sustainable learning hence acquires suitable strategies for eliminating economic, social, cultural and linguistic obstacles that may prevent access to success for all. Sustainable learning is a mechanism for fighting against inequality and cognitive, cultural and social rifts, striving towards mobility and socio-economic levelling.

2.90. Lastly, sustainability underpins the sense and scope of sustainable learning. Because it consists of relevant learning, it has meaning and utility for learners, helping them cope with the challenges of their local, national and global environment. From a modern day perspective, sustainability incorporates a minimum of four challenges for humanity and all of mankind: a well-known environmental challenge, a more controversial but just as real economic challenge, a particularly steep social challenge, and a burning cultural challenge.

- Global warming and other risks to the environment call for raised awareness and changes in behaviour ensuing from learning.
- The economic growth model based on competition and a frenzied exploitation of the planet's resources poses a clear danger to humanity. It irreversibly drains the earth of natural resources and has a devastating impact on the environment. It compromises the present and all future generations, to the point that it has now become critical to address the matter of how to produce so as to ensure future growth. It clamours for a change in the models we use for the production, consumption and distribution of goods.
- In addition to mortgaging the lives of future generations, this economic growth model plunges millions of human beings into poverty and marginalization. It provokes societal breakdowns and generates ever-widening chasms of inequality between rich and poor. It feeds misery and hunger, as well as constituting fuel for frustration and violence that further compromise society's stability and continuity. The building of inclusive local, national and global societies is increasingly bandied about as the necessary role for learning as a factor for equality and socio-economic mobilization.

2.91. Human and cultural conflicts, in addition to engendering inequality and frustration, have recently risen in number and severity, exacerbated by an increase in bigotry and extremism in all regions of the world. Some of the most explosive illustrations of this are terrorism and the wars in Iraq and Afghanistan. Aside from this, however, a peek at the daily barrage of clichéd violence, intolerance and cultural and religious insensitivity in our modern societies leads us to think we may be only seeing the tip of the proverbial iceberg. The necessity of better promoting knowledge, comprehension and the recognition of and respect for alternative methods is increasingly an important and final component of learning.
2.92. Within such a global context, sustainable learning contributes to providing humanity with the answers it will need to surmount the challenges threatening its survival. It has varied implications with regard to the definition of orientations and outcomes, goals and objectives in learning strategies and processes, and the criteria and performance indicators used to measure its success.

2.93. Ultimately, sustainable learning translates into learning for sustainable development in its widest sense. It involves a cultural and institutional reorganization of education and its structure, to:

- create new outcomes in light of the human challenges and issues facing the modern day world;
- promote education as global public property, ensuing from the international solidarity necessary to face the vital risks and challenges to humanity, of concern to everyone, present on a planetary scale;
- adopt an orientation towards lifelong learning;
- favour the diversification of intersectoral learning systems, their modes and their methods, in and outside of the school setting, to better strive towards success for all;
- ensure the flexibility, openness and continuous adaptation of its foundation and institutional content in the face of change.

**Element 7: Lifelong learning for all**

2.94. Nearly four decades, ago, on May 18, 1972, Edgar Faure sent a letter to the Director-General of UNESCO: "...only an over-all, lifelong education can produce the kind of complete man the need for whom is increasing with the continually more stringent constraints tearing the individual asunder. We should no longer assiduously acquire knowledge once and for all, but learn how to build up a continually evolving body of knowledge all through life—'learn to be'." This assertion, true at the time, takes on an entirely new dimension today.

2.95. First, existing knowledge on the importance of learning as of birth and throughout the early childhood years has given a renewed impetus to parental education as well as preschool education programs. Associated with concepts of human and social capital, lifelong learning incorporates education and skills development as factors in favour of productivity, innovation, organization, technological curiosity, health, longevity, and participation. From an economic standpoint, it is estimated that productivity increases between 3% and 6% for each additional year of schooling. The staggering pace of scientific and technological innovation, discovery and invention, moreover, have provoked an instability and growing mobility of the means of production, exchanges, professions and jobs, and knowledge and skills. Rapid mutations are impacting economic production and markets as well as societal structures and activities, including those related to culture. Change, innovation and transformation are elevated to a way of being, a set of values. They propel the development of human and social capital, which in turn serve as levers of growth and
competition for innovation and change. They speed up the obsolescence rate of learning, knowledge, skills, technologies and even innovations.

2.96. Another factor bolstering the need for lifelong learning is the fact that people, on average, live longer. This means that people must work longer, which has the effect of progressively postponing the retirement age.

2.97. For all of these reasons, lifelong learning has gone from being a choice to constituting a right for any human being or society that does not wish to be left behind, marginalized, and watch the rest of the world progress on a global scale.

2.98. This need to continually adapt to a complex and changing world cannot be met by universal primary education and the elimination of illiteracy. It even goes beyond continuing education to find support in a diverse and integrated network of efficient schools, flexible and efficient vocational training centres, universities, institutions of higher learning and research focused on sustainable development, training methods suitable for adults, and new models for the sharing and cooperative development of knowledge and skills. According to the systemic paradigm, more complex and diverse learning systems will be required to enable people to cope within our new world. The organization and functioning of diversified and integrated learning approaches and environments must thus be designed and implemented to enable everyone to learn in the world as it is today and as it continues to change. Furthermore, there needs to be inter-changeability between formal and non-formal suppliers of lifelong education.

2.99. China is developing an institutional and legislative framework to make lifelong learning a concrete reality. The United Kingdom recently produced a report that makes ten recommendations for a lifelong learning strategy that include learning entitlements, over four life stages (Schuller & Watson 2009). South Korea’s National Institute for Lifelong Education was established by law in 2007 that offers a bachelor’s degree in self-education and operates individual lifelong learning accounts. In Denmark, each worker is assigned a credit of 1,000 hours, to be used for training throughout his/her career. These approaches and countless others illustrate the various challenges facing lifelong learning: favourable legal framework, effective incentive sources, acceptable scheduling of working time, efficient funding mechanisms, adapted structures and resources, operating capacity, appropriate systems for the evaluation and recognition of acquired learning, etc.

2.100. However, lifelong learning is not merely a matter of incentives and method. It also comprises the promotion of cultures and global and open learning environments, designed for everyone, anywhere and at any time, in all fields of education. It takes, in essence, an environment where knowledge is not only accessible, but where it is nurtured and shared.
Element 8: Building learning societies

2.101. Lifelong learning posits the building of learning societies.

If learning involves all of one's life, in the sense of both time-span and diversity, and all of society, including its social and economic as well as its educational resources, then we must go even further than the necessary overhaul of 'educational systems' until we reach the stage of a learning society (Faure & et al. 1972:xxxiii)

A learning society refers to an environment where everyone is learning every day, both in and outside of the school setting. It requires a reconfiguration of educational systems on the basis of learner needs and the enhancement of the ability to develop knowledge based on the resources associated to not only academic, but also social, economic and cultural structures and practices.

2.102. Training itself is first diversified, by generalising training-action, dual training, distance-training and free learning. Lastly but most importantly, the building and development of skills no longer relies solely on education, but is also the result of social, economic and cultural processes. Under this approach, the procedures of economic, social and cultural organizations are developed and introduced so as to stimulate and support learning approaches through the management of knowledge, the capitalization of experience and acquired knowledge, and sharing mechanisms such as exchange networks, buddy systems, coaching, tutorship and shared learning.

2.103. In these learning organizations, working groups, sharing networks, professional communities, and exchange meetings enable everyone to not only acquire knowledge, but also to develop their ability to observe, understand, analyze, draw connections, master tools and approaches for critical thinking, and conduct research and experiments. In short, they are promoting learning ability. Their systematization at all levels (national to target communities) and across all sectors of society makes it possible to move towards learning societies, the foundation of lifelong learning. Learning societies do not replace existing educational systems. Instead, they force them to change from being traditional knowledge banks to integrated and integral elements of a larger, more flexible and increasingly diverse systems focused on the learning needs of everyone. The Copernican revolution at work here is a dual one. It has the effect of shifting the centre of the systems from those who possess knowledge towards those seeking to acquire it, hence from the academic monopoly of expert knowledge to the collaborative intelligence of society as a whole.

2.104. Formal and informal educational systems seek to co-exist by integrating and diversifying as a means of acknowledging, respecting and meeting the requirements of a diverse population. By modifying their methods, they are opening themselves to cooperative or collaborative learning through working groups, tutors, coaching, pedagogical support, peer learning, and intergenerational community learning. They develop collective learning skills, and the ability to jointly build learning networks and partnerships as a means of achieving joint projects for the development and production of knowledge and/or the
reinforcement of skills. According to the sociologist Philippe Pierre,\textsuperscript{50} these intersecting learning approaches prompt "dialogue across the spectrum of intelligence and ages" to further promote individual and collective transformational projects.

2.105. Learning societies are thus paving the way to include everyone in building a vision of the future for society, the community, the enterprise or the group, a vision that rests on shared learning, the sharing of good practices, the mastery of the tools of change, the development of innovation...

2.106. Educational systems, like other societal organizations, strengthen their learning dimension to facilitate the necessary changes. With the media revolution and the rapid emergence of information societies, learning societies have access to new tools to boost their development. Broadcast on the radio, television and in the written press, information and communication technologies have brought a new digital information age to the general public. Even more so than the printing revolution, the rapid growth of modern technologies, computers, Internet, wireless telephony and other multimedia tools has upended production conditions, the gathering and classification of information, and the dissemination of knowledge, all while enabling the collection, processing, codification, storage and transmission of previously unimaginable quantities of data at lightning speeds. Learning and the sharing of knowledge hence enjoy incredibly powerful media to include everyone in information access, production and innovation. As attested to by the wide range of opportunities, among them e-learning from virtual institutions, distance learning and free learning by surfing the Web and exchange networks, and making use of e-mails, blogs, sharing platforms, mailing lists...

2.107. New technologies—including social networks, cell phones and texting, databases, content delivery, open, distant and virtual universities—should play a role in strengthening learning opportunities at all stages of life. To overcome the inertia to provide services to the millions young people with no access to formal educational opportunities, we will need to embrace unconventional forms of education. South Africa, for example, is experimenting with several approaches, including a ‘hole-in-the-wall’ technology that has shown that illiterate children are able to learn to surf the Internet in a language they have not heard, and an alphabet they have never seen. South Africa has also created a ‘Digital Doorway’ that accesses websites, full of learning content and can be surfed at ‘super Internet speeds’, because the data is local and does not even need an Internet connection.\textsuperscript{51} One could imagine Digital Doorway devices with self-learning content installed (literacy, entrepreneurship, etc.); bite-sized pieces of appropriate learning content being delivered via cell phone to subsistence farmers (animal health, soil nutrition, etc.); and daily updates on

\textsuperscript{50} Article in the "Le Matin en ligne" (Casablanca) - July 10 2009.

suitable life-skills topics via FaceBook. While much of the content will need to be aimed at delivery only (one-way), some of these technologies will also provide for interactivity in the new modes, made possible by social networking. In any case, there is presently a world of enterprising experimentation out there which, sooner or later, somehow or other, will work their ways into the educational processes and systems. We need to reflect upon how to bring the most promising of them to bear on the development of EFA.

2.108. We must nonetheless bear in mind the risks associated to the integration of new ICTs to learning societies. The "digital divide" does not only replicate the inequity related to access to computer material and network connections. It also reflects a gap of 1 to 5, with 20% of the world's population accounting for 80% of its income. It is also indicative of the cognitive gap that serves to marginalize over a billion functionally illiterate persons. Lastly, it reflects the linguistic and cultural gaps ensuing from the standardization and uniformity of a hegemonic technical and scientific model that excludes from learning the idioms, practices and knowledge of those cultures that choose to not adhere to its norms and rationality.

2.109. If we add to this the control, privatization and marketing of knowledge (including the development of patents in various areas of research and innovation), there is a real risk that the extent to which persons are considered educatable will be measured on the basis of income and subsequently deprive the poor and marginalized from vital knowledge (health, agriculture, technology,..). This would have the result of exacerbating existing inequalities. As for Internet access, the gap between developed countries (42%) and developing countries (4.2%) was 37.8% in 2002. In 2006, this gap actually grew to 48.5% (58.2% for the first group and 9.7% for the latter). Such averages often hide an even greater disparity between people living in various regions and countries.

2.110. To meet these risks, learning societies must be able to distinguish learning from information, by propelling and strengthening the critical interest of learners in this regard. An ability to look at things from afar, so as to not only confront but also to think things through, will allow for avoiding the trap of simply gobbling up a multitude of information. The second requirement consists of breaking away from the standardization and uniformity which excludes local and traditional know-how from knowledge, citing a rationality that is absolute. The underlying myth is that outside of the Hellenic reality, all is absurd. It has long been accepted that rationality is a pluralistic concept, and that there are numerous types of knowledge. Learning societies must cultivate human diversity and wealth, along with its multiple and varied languages and cultures, its rich history, and the vast associated knowledge.

52 Two more examples: the Open Educational Resources, popularised by UNESCO and the William and Flora Hewlett Foundation has the potential to provide the world with learning content to complement technologies used by masses of people; the WikiEducator project initiated by the Commonwealth of Learning is a repository of open content and online workshops, where content is in development.
2.111. It thus becomes necessary to not only ensure access to knowledge for all, but to also promote everyone’s participation in the production of the knowledge disseminated by ICTs, for collaborative development is a cornerstone of true sharing of knowledge. When all is said and done, building learning societies and integrating ICTs into them requires that sustainable development and the comprehensive development of all people be at heart of all ideas, practices and outcomes.

**Element 9: Moving from focus on deficits and gaps to identification of assets**

2.112. Just as physical constructions are made from assets, so are social and institutional constructions. We may define our needs in terms of gaps or deficits in order to mobilise resources and opinion, but once we begin to construct we have no choice but to identify available assets and build from them. However, development assistance to education has often focused more on deficits than on assets. It has been characterised by calls to fill gaps in enrolments (in general, for girls, for the poor, for the handicapped, etc.) and in the financing needed to attain EFA. Agency analyses—both global and for individual countries—often focus on financing gaps and policy shortcomings. World Bank country education status reports, for example, estimate financing gaps. This is consistent with their mission of raising resources and the provision of financial resources to countries for agreed policies. And, of course, these gaps do exist. However, we need to put into question how productive this is and ask where we would be if much greater emphasis were put on identifying and developing existing policy assets (Marope & Sack 2007). We need to distinguish between tactics for resource mobilisation, where proclaiming financing gaps is a reasonable approach, and policy development where it becomes more productive to focus on assets.53

2.113. One implication of this plays itself out in the area of useable knowledge for development education. We find a perception of asymmetry of global knowledge assets, even though the line of divide may not be clean and clear cut. Overall, the developed world is perceived as holding an abundance of global knowledge assets, while the developing world suffers a deficit. The former are the creators of knowledge, while the developing world is mostly the user of that knowledge. As astute observers note, knowledge has become the modern boundary between rich and poor countries, and between the backward and the advanced (Watkins 1999).

2.114. From this knowledge *deficit* approach, parts of the developing world have developed a tendency to look toward the developed world for solutions to their development

53 With particular reference to the MDGs, Easterly (2007) invites us to be wary of approaches that “set quantitative targets for every conceivable problem of the poor [and] then try to raise whatever it takes in aid money to reach them. This approach has succeeded as a fund-raising strategy but not as a problem-solving one.”
challenges. To a large extent, locally created, and contextually tethered knowledge is “overlooked and undervalued” (Maclure 1997). Sub-Saharan Africa provides a striking illustration of this. With its tendency to look inward for problems and outward for solutions, SSA has missed out on opportunities to systematize its learning from successful experiences, and to build on them. In other words, it has lost the opportunity to build its own knowledge assets, which, of course, need to be informed and enriched by knowledge from the developed world. The overly outward looking approach has also reinforced the tendency to build responses to development challenges on definitions and diagnoses of the problems, rather than on diagnosis and documentation of success, however partial. Analyses of why things don’t work (the deficit, liabilities) have commanded more attention than analyses of what works (the assets).

2.115. And yet, education practitioners know well that effective pedagogy is based on positive reinforcement, which means taking the learner’s strengths (assets) into account. For some reason, however, this has been ignored in the context of policy formulation for EFA (Marope & Sack 2007). We need to give more systematic thought to this paradox and how to ensure that policy formulation for EFA — both within countries and between them and their external development partners — is characterised by emphasis on policy assets. Even if such assets are latent, a major task of a pedagogical educational policy analysis and formulation process should be to identify them. Again, an international funding structure that is dedicated to education may be more capable of this than the current structures that are working in all sectors.

2.116. It is in this context that we need to remember that knowledge-based economies are characterized by learning organizations, networked together. From this perspective, “knowledge” is assumed to be universal in terms of meaning, access, impact and understanding. What counts is the knowledge, not how it is acquired. However, if the goal is to maximize the probability that nations accept “responsibility for their own development” by elaborating and putting into practice strategies that are “tailored to country circumstances” and involve “broad-based participation” (Köhler & Wolfensohn 2000), the implications in terms of the sources of knowledge on which all this is to be constructed take on special importance. Are there knowledge sources and processes that are more likely to promote these goals than others?

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54 This is just the context in which Naudet (2000) warns that we need to be concerned about solutions for ill-identified and poorly analyzed problems.

55 Building on assets is similar to what Fullan (1999:72) refers to (for schools, not for entire systems) as “integrative capital” which is a “unifying vision” (i.e., policy) based on deep knowledge of the environment and shared commitment.

56 For example, it is always useful to keep in mind the importance of European knowledge in Japan’s development, especially the planned and intentional importing of British education, economic and military models by the Meiji restoration in the second half of the nineteenth century. However, these “imports” were thoroughly integrated into Japan’s culture and institutions which maintained their own national identity.
2.117. The sustainability of new directions may well depend on how they respond to this question. We assume that “ownership” will occur only if it enters at the very beginning of the process, where the basic ingredients for the policy processes are generated and assembled. Our position is that these basic ingredients are information, knowledge and know-how that are acquired through the very experiences that comprise the processes of the formulation of education policies and the strategies for their implementation. We are concerned with the basic knowledge ingredients used by policy actors — including those in the development agencies of the North — working on, with and for education in Africa. And this is where it is essential to identify assets and use them as for laying the foundations of education development policies.

**Element 10: We need to learn from a critical analysis of aid effectiveness**

2.118. The 2010 G8 summit meeting held in Canada reaffirmed both the long-standing commitments to ensure success of the MDGs, and the importance of mutual responsibility through strong partnerships, particularly in Africa. And yet, these commitments and partnerships are far from having fulfilled the promises. This speaks to much of the analysis and assessment on Part 1 of this Report. The principal lessons that emerge from this are summarised in the following bullet points:

- The lack of a high profile international “champion” for education may help explain the relative stagnation of aid to the sector. Other factors may also be related to this stagnation, such as the lack of transformational policies in most countries. In any case, education has not managed to capture the attention of high-level personalities on the global stage.
- Delivery of aid to education needs to be designed around the special characteristics of the education, as well as the specific contexts in the recipient countries.
- The institutional cultures of some of the most important aid agencies are ill-adapted to the imperatives of (i) giving priority to local knowledge and know-how, and (ii) ensuring that country logic trumps agency logic when it comes to the timing of aid delivery (in the form of projects and programmes).
- At both the institutional and personal levels, financing and technical partners (the donors) need to assume a profile of modesty that recognises the depth to which there are little-to-no generic and simple answers to the issues at-hand.
- Aid to education needs to fully incorporate local knowledge and know-how.
- Monitoring and evaluation are insufficient and need to be given much more prominence.

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58 OECD’s Development Assistance Committee first principle in its long-term vision for international engagement in fragile states is “take context as the starting point” (OECD 2007).
• The expectations of all parties need to be well articulated and taken into account. Venues should be explored for improved and more extensive dialogue between all parties.

• Efforts need to be increased to identify existing national and local policy assets — i.e., what is working.

2.119. The cornerstone of the architecture we propose is an institutional entity that is capable of (i) channelling resources to education, and (ii) taking into account the specificities of the education sector in each country. To some extent, this was the role expected of the expanded FTI (with its catalytic fund). However, as we have seen from its recent evaluation, FTI may not be the appropriate instrument for this. This is why, throughout our discussion of the elements of our architecture, we bring up the proposal to create a new global fund for education.

2.120. Institutional learning is not a simple matter — especially in large institutions that have a variety of mandates and products. Take, for example, the issue of “ownership”. It was in the early 1990s that the World Bank came to understand that poor project performance was the result of its own institutional culture. After that report, “ownership” became a buzz word throughout the development community. However, there is little evidence that anything really changed: the pressures on Bank staff to get the projects out and to meet the institution’s time-bound criteria for project approval remained intact. Effective national ownership is still an issue, even these days of programme and budget support.

2.121. Capacity and capacity building have also been on the development agenda for decades by now. And yet, this is still a major issue that goes far beyond the confines of training (Cohen 1995; Grindle & Hilderbrand 1995). The issue continues to bedevil us — perhaps more than ever — and it is clear that it impinges on the quality of policy dialogue, even down to the literal meaning of the term. This is an area where we may need radically new thinking that includes identification of what is working and, perhaps, a different way of defining and conceptualizing the issue. And, for the education sector, the issues need to be thought through in ways that are specific to the sector.

2.122. An example of the need for this can be found in many of the World Bank’s “Country Status Reports” on education that provide a wealth of analytical information related to financing needs. However, they contain little-to-no analysis on implementation capabilities and the effectiveness of the organizational structures that are expected to carry out the day-to-day tasks that keep the system running; nor do they contain analyses of the curriculum.

59 The Wapenhans (1992) Report — Willi Wapenhans was a vice-president of the World Bank; his report was an internal document — used the Bank’s own criteria for reviewing projects. It found that 37.5 percent of recently evaluated projects were unsatisfactory. The report found that this poor showing was linked to the “culture of approval” that characterised the institution’s internal culture. The Report found that Bank staff members perceived the appraisal process as merely a “marketing device for securing loan approval,” and that the pressure to lend overwhelms all other considerations, such as country ownership.
and instructional issues. This is symptomatic of most analytical approaches associated with resource planning. As necessary as such analyses are, they are far from sufficient. After all, this is what we’ve been doing for decades and the uphill struggle to achieve sustainable capacity remains substantial.

2.123. Our analysis of aid effectiveness also brings us to raise the two more points: (i) How effective can EFA be if it is divorced from the broader socio-economic issues surrounding that of poverty, which, after all, is the major reason for staying out of school, early drop-out and/or poor performance? and (ii) How reasonable is it to focus on only one level of education at the (unintended) expense of other levels? Education needs to be addressed holistically, not only in terms of its various parts and sub-sectors, but also with respect to its broader socio-economic, cultural and institutional contexts. Nonetheless, it is also important to note the unreasonable tendency to charge education with myriad mandates, such as the reduction of poverty, the eradication of inequalities ... What counts is that education systems and their schools function properly and deliver the results and services expected by national policies.

2.124. The big question, of course, is how to move from lessons to actions. This is the question we must tackle. The creation of a dedicated fund for education, independent of existing institutional structures is probably the best idea currently on the scene. It has supporters and some momentum behind it. Currently, there are global funds for health that can provide some lessons, even though the nature of support to the health sector is, perforce, different than that for education. Furthermore, such a structure, whose institutional culture would be designed in function of the specificities of the education sector, provides the greatest likelihood of blending the lessons of the past with current needs and goals. Declarations of good intentions, often backed up with some resources, are needed; and there have been many over the years. Nonetheless, multifarious problems remain — from lack of demand for the most economically marginalised populations to the implementation capacities of agencies, ministries and schools. The time has come to tackle these issues with an international architectural capacity that goes beyond the business-as-usual approaches we have known for decades.

2.125. There is much to be said for establishing a dedicated Global Fund for Education that would carry on from the FTI or other efforts that are part of, or emanations from larger institutions. According to Sperling (2008: 5-6), the major advantages of such a fund would be: it would introduce a single, unified global education process; it would put in place a strong, independent secretariat with broad organisational ownership; it would improve both the coordination and management of external financing for education; it could facilitate

60 The 2010 G8 Declaration also calls for a “whole-of-country approach” in order to achieve the MDGs,

increases in the level and duration of funding; it would build trust for a global compact on funding, accountability and outcomes; it would provide greater visibility for the education in general and the EFA imperative in particular. Furthermore, there is increasing support for this idea (Bermingham 2009; Sperling 2008). An additional advantage of such a Fund would be its exclusive and pragmatic focus on education, without excessive interference from economistic and other more theoretical perspectives that have been ill-served by recent events.

\[62\] See [http://www.cfr.org/publication/17839/toward_a_global_fund_for_education.html](http://www.cfr.org/publication/17839/toward_a_global_fund_for_education.html) for a discussion on this between proponents of such a fund and staff at FTI, the World Bank, and USAID. Also, FTI was originally part of the World Bank and appears to be gaining partial distance from that institution. It is probably fair to say that its institutional culture remains greatly influenced by that of the World Bank.
CONCLUSIONS

Three questions must be asked by EFA:

- What have we learned?
- Have we identified the appropriate “game changers” that are needed if we are to meet the global objectives agreed by the international community already twenty years ago?
- What new perspectives are there for considering and taking action to promote the achievement of EFA?

The lessons learned are defined by obstacles to avoid and promising avenues to explore if one is committed to working towards education for all.

When it comes to the obstacles, we now know that status quo policies are ineffective for attaining EFA objectives because:

- They give little or no consideration to the concerns of EFA stakeholders and are the brainchild of minimally committed political leadership.
- They maintain inequitable systems as is, thus retaining the sources and factors of inequity and discrimination currently found in the educational system.
- They generate an EFA that is only about schooling and that ignores other learning resources and dimensions by excluding those with no access to the traditional academic model, or for whose needs and circumstances such a model is inadequate.
- They favour the development and implementation of EFA as a quantitative supplement to access, while neglecting quality as a concept intrinsically linked to equity.

We also know that corrective policies will delay the most difficult EFA objectives and targets for an unacceptable length of time, because:

- They fail to hear the civil societies and communities that are involved, and are conducted by a leadership prone to avoiding risk and reluctant to distance itself from the status quo;
- They adopt a long-term and step-by-tiny-step approach to the reforms of inequitable systems;
- They pay little attention to the needs, abilities and resources of local environments;
- They take simplistic and reductionist approaches to EFA, which are discordant with a systemic vision of the sectoral framework for the development of education;

- Their overall approaches to EFA focus almost exclusively on access.

We now understand that international financial and technical support cannot efficiently bolster countries committed to EFA:

- Because it is not driven by a strong political will in support of EFA, and pays little heed to its undertakings with regard to international solidarity;

- The object and objective of such support is to fill a void, namely deficits in resources and abilities, with no link to the assets and acquired knowledge of countries, which are the true building block of progress;

- It promotes the extroversion of policies through unequal dialogue, conditionalities and the imposition of models that many disregard local and national ownership and solutions;

- It introduces or bolsters fragmented, simplistic or counterproductive EFA approaches;

- It is increasingly focused on maintaining and ensuring adherence to complex and rigid procedures, rather than on efficiently and effectively achieving development objectives;

- It favours short-term results over long-term commitments.

As for promising avenues, main elements arising from the lessons learned can be summarised as follows.

The EFA approach is successful when integrated within a holistic framework in which due consideration is granted to vertical and horizontal actions and interactions favouring quality and diversification. Its success also rests on balanced development and the integration of all of the global system’s sectors, elements and resources in order to meet the learning needs of everyone.

This holistic approach is supplemented by a praxis approach. Such an approach enables learning from an analysis of actions underway in the field and from the integration of lessons learned with the development of system imperatives in favour of learning for all. Such a process requires that education sector actors commit to an ongoing evaluation of their own experience, to generate and capitalize on local knowledge and solutions relevant to the specific circumstances. Outside support should have the mission of strengthening local processes, assets and advantages to produce catalyzing effects in favour of EFA.
EFA is based on transformational policies that require political will and are focused on gender equality and equity.

The move to transformational policies is facilitated by questioning the status quo and gaps in the existing learning approach, the educational system and society as a whole.

The learning at the heart of EFA is characterised by its: sustainability, relevance, quality, comprehensiveness, and its intersectoral and multidimensional dimensions—all of which enable it to impact the deep-seated process whereby man evolves. Sustainable learning is also at EFA's core, notably because it develops the knowledge, skills and behaviours humanity must favour to overcome the challenges presently threatening its survival. In this regard, learning is sustainable when it becomes a critical element of sustainable development in its widest sense.

Sustainable learning is necessarily a component of a lifelong learning process which is itself deployed in learning societies. As a result, EFA, in developing countries and developed countries alike, is fully realized when learning societies are completely erected.

We can obviously experience some difficulty adapting to these new perspectives, being products of the existing educational system. It is also a challenge to think of learning, the acquisition of knowledge and skills development outside of the traditional academic systems, paradigms and approaches. Yet life illustrates, on a daily basis, that there are other ways of learning as well as numerous sources of alternative learning available in our society.

Can we think out of the box, expand our horizons and consider this diversity? Will we succeed at conceptualizing and transmitting this wide and diversified vision of learning by stepping outside of our rigid ways of thinking? Can we go beyond our traditional systems to develop and strengthen multi-level ties, cooperation and the intersectoral initiatives necessary to mobilize and integrate all of the learning opportunities and resources available from the State and society? Will we be able to introduce learning communities and learner organizations in the workplace and in recreational venues, among families and communities, and elsewhere in society?

These questions are also pertinent to the way in which donor support to EFA has been practiced. It often appears to be organised around the processes, technical requirements, know-how, knowledge bases, time frames, bureaucratic constraints, and rationalities of the donor agencies rather than those of the countries. As a result, country ownership is often lacking and country decision makers act as though they were more accountable to their international partners than to their own population. Lack of attention to local knowledge and discovering what works in countries and focusing of their educational deficits rather than on their assets contributes to this.

More appropriate methods and structures need to be devised. The behaviour of the agencies needs to be reformed, including in the direction of greater modesty when it comes to both their institutional relationships and the more personal interactions of their
representatives in the field. One idea put forward is the creation of a global fund for education whose organisation, procedures and institutional culture would be adapted to the particularities of the education sector.

These are the challenges we must overcome to ensure that no human being is left aside in the exercise of the right to quality education for all.
**AFTERWORD**

It may be argued that the world knows no shortage of international organisations with an interest and formal remit in Education. There are those bodies that were established under the Bretton Woods process, as well as many others, both large and small.

By contrast, the Policy Action Group on Learning (PAG-L), an outgrowth of the Commission on Globalisation, has not been mandated by the United Nations Organisation or by other international entities that are characterised by membership of nation states. In this sense, PAG-L has an informal remit, unsanctioned by governments of any country.

Why then should PAG-L take upon itself an evaluation of an Education for All (EFA) process that was put in place and monitored by august international bodies with nation-state membership? And why should such an assessment of outcomes be broadly heeded by those same organisations, and the governments and civil societies which have an interest in them?

It is precisely because PAG-L is not a representative body that it is not required to express concerns or competing views of constituent groups. As a North-South deliberative entity composed of experts in the field of learning policy, whose membership in PAG-L is predicated on their independence from such constraints, PAG-L is ideally placed to develop analysis and conclusions, and to propose recommendations to the global community, that may not emerge from larger international institutions.

The principal reason, however, for which PAG-L believes that its contribution is significant lies in the criteria we have self-imposed in order to judge the benefit and utility of this endeavour. Both our analysis and our recommendations for change and improvement in the EFA process must be: credible, relevant, applicable, comprehensive, and bridge gaps in understanding and perspective.

**Credibility**

Credibility will be judged not only by the expertise and experience of the members of PAG-L but also by the clarity and precision of our discourse.

**Relevance**

The criterion of relevance implies a focus on those aspects of EFA that are most important and for which improvement would yield most benefits. Education requires not just massification, but transformation.

Relevance also implies that PAG-L’s work not be limited to developing countries, as if only they had an interest in EFA. If wealthier and emerging economies are not truly engaged in international learning undertakings because they recognise their own interests therein, those endeavours will fail.
**Applicability**

Applicability implies that there is useful and feasible action that could follow from each aspect of the evaluation and from each recommendation. Since education is conceived as a means to development and sustainability, any critique of current processes and priorities must lead to suggestions for change and improvement.

**Comprehensible**

PAG-L’s assessment of EFA must be thorough and extensive; but it must also be comprehensible to a wide audience not comprised principally of educators, governments, or insiders. Learning is in everyone’s jurisdiction, the responsibility of all. The language and ideas in this document must therefore be accessible to all.

**Comprehensive and specific**

Analysis and recommendations must meet an exacting standard by being both comprehensive but also sufficiently specific as to indicate attainable and operationalizable change.

**Optimal conditions for success**

PAG-L must attain the objective of setting out optimal conditions for future success in Education, not falling into the trap of prescribing standardised remedies.

**Bridging gaps**

PAG-L’s most important criterion for its internal self-assessment is the determination to bridge gaps: gaps in understanding of Education and EFA in particular; divergences in perspectives and attitudes; incoherencies among international organisations; and between “donor” and recipient countries.

Critique of our collective achievements under EFA implies no language of condemnation, no litany of outraged judgment of wrongs, hurts and deliberate misapprehensions. Our analysis and recommendations must assist in the harnessing of energies and goodwill from diverse sources.
## ABBREVIATIONS AND ACRONYMS

- **ADEA**: Association for the Development of Education in Africa
- **BRAC**: Bangladesh Rural Advancement Committee
- **CAR**: Central African Republic
- **CIDA**: Canadian International Development Agency
- **DAC**: Development Assistance Committee
- **DAE**: Donors to African Education
- **DP**: Development Partners
- **EAP**: East Asia and the Pacific
- **ECE**: Early Childhood Education
- **EFA**: Education for All
- **FAWE**: Forum for African Women Educationalists
- **FTI**: Fast Track Initiative
- **GAVI**: Global Alliance for Vaccines and Immunisation
- **GCE**: Global Campaign for Education
- **GER**: Gross Enrolment Rate
- **Global Fund**: Global Fund to Fight AIDS, Tuberculosis and Malaria
- **GMR**: Global Monitoring Report
- **GNP**: Gross National Product
- **GPI**: Gender Parity Index
- **ICT**: Information and Communication Technology
- **IDRC**: International Development Research Centre
- **IIEP**: International Institute for Educational Planning
- **LAC**: Latin America and the Caribbean
- **MCC**: Unites States’ Millennium Challenge Corporation
- **MDG**: Millennium Development Goal
- **MENA**: Middle East and North Africa
- **MLA**: Monitoring Learning Achievement
- **NER**: Net Enrolment Rate
- **NGO**: Non-Governmental Organization
- **ODA**: Official Development Aid
- **OECD**: Organisation for Economic Cooperation and Development
- **PAG-L**: Policy Action Group for Learning
- **PASEC**: Programme d'analyse des systèmes éducatifs de la CONFEMEN
- **PISA**: Programme for International Student Assessment
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>PRSP</td>
<td>Poverty Reduction Strategy Paper</td>
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<tr>
<td>PTA</td>
<td>Parent teachers association</td>
</tr>
<tr>
<td>SACMEQ</td>
<td>Southern African Consortium for Measuring Educational Quality</td>
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<tr>
<td>SSA</td>
<td>Sub-Saharan Africa</td>
</tr>
<tr>
<td>SWA</td>
<td>South and West Asia</td>
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<tr>
<td>SWAp</td>
<td>Sector-Wide Approach</td>
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<tr>
<td>TEVT</td>
<td>Technical Education and Vocational Training</td>
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<tr>
<td>TIMSS</td>
<td>Trends in International Mathematics and Science Study</td>
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<tr>
<td>UNDP</td>
<td>United Nations Development Programme</td>
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<tr>
<td>UNFPA</td>
<td>United Nations Population Fund</td>
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<tr>
<td>UPE</td>
<td>Universal Primary Education</td>
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<tr>
<td>USD</td>
<td>United States Dollars</td>
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### ANNEX 1: Glossary of indicators used in Tables 3 and 4

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Gross intake rate*</td>
<td>Total number of new entrants to a given grade of primary education, regardless of age, expressed as a percentage of the population at the official school entrance age for that grade</td>
</tr>
<tr>
<td>Net Enrolment Rate (NER)*</td>
<td>Enrolment of the official age group for a given level of education, expressed as a percentage of the population in that age group.</td>
</tr>
<tr>
<td>Gross Enrolment Rate (GER)*</td>
<td>Total enrolment in a specific level of education, regardless of age, expressed as a percentage of the population in the official age group corresponding to this level of education. The GER can exceed 100% due to early or late entry and/or grade repetition.</td>
</tr>
<tr>
<td>Primary school completion rate*</td>
<td>The number of pupils who complete the final year of primary school, expressed as a percentage of the number who entered the first year.</td>
</tr>
<tr>
<td>Gender parity index, Basic ed*</td>
<td>Ratio of female to male values (or male to female, in certain cases) of a given indicator. A GPI of 1 indicates parity between sexes; a GPI above or below 1 indicates a disparity in favour of one sex over the other.</td>
</tr>
<tr>
<td>% GDP to Ed</td>
<td>Percentage of the Gross Domestic Product received by the education sector</td>
</tr>
<tr>
<td>% Govt Budget to Ed</td>
<td>Percentage of government budget that goes to education</td>
</tr>
<tr>
<td>% GDP to Basic Ed</td>
<td>Percentage of the GDP that goes to basic education</td>
</tr>
<tr>
<td>External financial assistance to ed (Millions US$)</td>
<td>Amount of external financing from the DPs that goes to education</td>
</tr>
<tr>
<td>Survival rate to last grade of primary school*</td>
<td>Percentage of a cohort of students who are enrolled in the first grade in a given school year and are expected to reach the last grade, regardless of repetition.</td>
</tr>
</tbody>
</table>

* Definitions taken from UNESCO GMR.