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At the crossroads: Which way forward for a global compact on education?

GCE briefing for the Education for All High Level Group in Oslo
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Eight years after the Dakar World Education Conference, the much-celebrated 'global compact' on Education For All (EFA) appears to be in serious jeopardy. Over 70 million children remain out of school, learning achievement is worryingly low, and literacy provision and early childhood services have been woefully neglected. Many countries now rely on untrained, contract teachers who struggle to provide quality education in overcrowded classrooms with few resources.

As GCE's 2008 Global School Report showed, developing countries have, on the whole, made serious efforts to live up to their part of the global compact. 14 countries have abolished fees for education since 2000. Expenditure on education has risen in the majority of countries from which data is available, and for developing countries has now reached an average of 20% of budgets[1]. Growth of funding from national governments has been strongest in Sub-Saharan Africa and South and West Asia – the regions with greatest need. While there is considerable variation among countries, and the issue of equitability of spending within countries remains there has nevertheless been a strongly discernible 'Dakar effect' on political will in the South. Still, much remains to be done. Equitable and sustained progress across all subsectors of basic education, including expansion to secondary level, depends to a large extent on the availability of further resources to pursue rational policies. And there are still, of course, too many countries spending too little on education.

But, as this briefing paper demonstrates, the biggest challenge is that developing countries' efforts, far from being supported by the international community, have been and are being actively undermined in a number of ways. Most donors are not living up to their commitments to finance EFA, with a continued neglect of funding to the basic education sector and the low-income countries that are most in need. The Education For All Fast Track Initiative remains seriously underfunded as result of this negligence. The World Bank a significant partner in providing basic education assistance, appears to be shifting its priorities away from basic education. It has undermined its position as the world's largest financer of basic education by proving to be a hindrance to the EFA Fast-Track Initiative (EFA-FTI) Catalytic Fund effectiveness, and puts forward ideologically-driven policy advice that contradicts the spirit of the Dakar Framework for Action and at times runs against the evidence of what is needed to achieve EFA. Meanwhile its sister organisation, the IMF, deprives governments of sufficient fiscal space to upscale investment in education by requiring rigid adherence to its now increasingly irrelevant-looking macro-economic orthodoxy.

The paper makes the case for a re-invigoration of the global compact on education to redress this situation. It recommends a revival of the original vision of Education For All, supported by conducive policies from donors and international financial institutions. This will be essential to meet the priorities outlined in the EFA High-Level Group meeting, and go further and quicker in the coming crucial years.

Rich countries are 'Not up to scratch' in providing aid to basic education

At a very basic level, it is abundantly clear that donors have not fulfilled their side of the Dakar bargain. If donors gave $11 billion annually this would enable the achievement of universal primary education and a significant improvement in provision of early childhood care and literacy programmes[2]. Aid to basic education grew between 2000 and 2004 but has stagnated at around $4 billion per year. Shockingly, only 5 of the 22 OECD bilateral donors managed to give 90% or more of their fair share of this total in 2006 with many of the richest among them falling far short. The US, Japan, Germany and Italy are the most miserly of the rich countries, collectively giving just 10% of what is needed to keep their own promises of every person having the chance of an education by 2015. 60% of aid to basic education comes from five sources: the UK, the Netherlands and the World Bank International Development Association, the EC and the USA[3]. The Netherlands is far and away the strongest performer on aid to basic education giving seven times more than its fair share.

And a bigger challenge is on the horizon with the need to expand education to lower secondary level. It is unacceptable for children to go to work at the age of 11 and even a school leaving age of 14 will require further funds. Only the Netherlands - is giving its fair share of the total $16 billion needed per year to allow for an expansion of education opportunities to lower secondary level[4]. Moreover, assistance remains skewed towards expensive consultancies and tied aid projects. It is particularly shocking that the global plan to link increased aid to education sector plans – the Education For All Fast-Track Initiative – remains chronically underfunded. Endorsed countries face a financing gap of at least $1 billion in 2008, which is expected to grow to over $4 billion by 2010. Tragically, the countries most in need, countries affected by fragility and conflict, receive the smallest portion of aid, attracting just 20% of the total despite accounting for a high proportion of out-of-school children[5].

Table 1 Fair shares of the financing gap for education[6]

Country	Annual aid commitments to basic education in 2006, US$ million current	Donor GNI as % of Total OECD GNI	**Fair share of $11 billion based on donor GNI, $ million**	% of fair share actually committed	**Fair share of $16 billion based on donor GNI, $ million**	% of fair share actually committed
Netherlands	1,686.6	2.0	218	775%	317	533%
Norway	132.2	1.0	107	123%	156	85%
Sweden	141.5	1.1	124	114%	181	78%
United Kingdom	747.9	7.1	780	96%	1,135	66%
Luxembourg	10.4	0.1	11	93%	16	64%
Ireland	52.2	0.6	61	86%	88	59%
New Zealand	19.1	0.3	31	61%	45	42%
Canada	238.5	3.7	404	59%	587	41%
Belgium	52.6	1.2	127	41%	185	28%
France	293.7	6.6	730	40%	1,061	28%
Australia	71.7	2.1	232	31%	337	21%
Spain	109.4	3.5	390	28%	567	19%
Denmark	24.9	0.8	90	28%	131	19%
Finland	17.8	0.6	68	26%	99	18%
Switzerland	32.7	1.2	136	24%	197	17%
Germany	223.5	8.6	943	24%	1,372	16%
Japan	332.8	13.1	1,444	23%	2,100	16%
Portugal	12.7	0.5	60	21%	88	14%
Austria	16.8	0.9	103	16%	150	11%
Greece	8.0	0.7	79	10%	115	7%
United States	393.2	38.8	4,268	9%	6,209	6%
Italy	42.2	5.4	595	7%	865	5%

For the global total to increase significantly, it is clear that major economies such as Germany, the United States, Japan and Italy will have to both increase ODA and give a larger share of it to basic education. The situation of relying on a few donors to carry water for the whole cannot continue. All rich countries must aim higher and work together better to fulfil their part of the Dakar bargain. They should meet the international target for giving 0.7% GNI in overseas development assistance each year, and must ensure that their aid targets needy countries.

The quest for quality- what more could donors do on class sizes and teachers?

The shortfall in external financing for education has undoubtedly held back countries in their efforts to open the doors of learning to all, and to truly address every aspect of the Education For All agenda agreed in Dakar in 2000. One of the most pressing, and neglected, dimensions, has been the critical issue of quality. The right to education is not merely the right to a place in the school-room, but the right to learn real skills and develop critical abilities in a safe, conducive and caring environment. However, as the 2009 Education For All Global Monitoring Report notes, both national and international assessments of learning outcomes, including reading and numeracy but also critical thinking skills, show worryingly low levels of achievement in numerous poor countries. Many factors influence the ability of countries and their education systems to improve quality, including poor school infrastructure, lack of teaching and learning materials and problems ensuring teacher supply, retention and motivation. Addressing all of these inevitably requires resources.

It is hardly surprising that learning has been problematic when one considers that teacher recruitment has failed to keep pace with enrolment. Zambia, for example, has been forced to accept a pupil: teacher ratio of almost 70:1 in order to expand educa-

tion provision to all. In countries like in Afghanistan, Chad, Madagascar, Mozambique and Nepal the ratio of pupils to *trained* teachers is over 100:1[7]. In other countries, such as Senegal, Niger and Benin, governments have sought to supplement their stock of teachers by hiring contract teachers with less training and for lower wages.

This section of the briefing, focuses on the role of donors in giving financial support to teachers. The process leading up to the Olso Education For All High-Level Group meeting has identified the teacher crisis as one of the most pressing issues facing the EFA movement in the drive to ensure quality in education. The UN has clearly shown that 18 million teachers will need to be trained and hired between now and 2015. Lack of external funds has already forced countries to rely on untrained and contract teachers, in some cases (for example, Senegal) reaching 50% of the total teacher workforce. The shortage of professional teachers is recognised by UNESCO and the host government Norway as a 'formidable barrier to furthering progress' requiring 'an unprecedented and urgent effort'[8]. It is therefore obvious that when considering the financing needed to achieve the Education for All goals and MDGs 2 and 3 – the cost of recruiting, training and employing more teachers is fundamental. Teachers are the lifeblood of an education system.

As was shown in the section above, the volume of overseas development assistance (ODA) is still far short of the total needed to achieve EFA. On top of this problem, current aid modalities do not assist countries to be able to plan for a managed expansion of the teacher profession. Teacher salaries typically account for 70-90% of education expenditure, which must be fully budgeted for in at least a three-year medium-term expenditure framework. For ODA to be included towards this total, it needs to be both predictable and available to the core running costs of education, typically through either general budget support or sector budget support. These aid modalities allow governments flexibility to spend aid on the mainstream expenditure items in the education budget. However, donors remain reluctant to contribute their aid in this progressive fashion, preferring to support tied aid, projects or technical assistance. This means that the funds are effectively ringfenced and cannot be used to support the core running costs of teachers, with donors doing effectively little or nothing to tackle the teacher crisis.

In many cases donors do not understand or attempt to monitor their contribution to closing the teacher gap. According to the 2009 EFA Global Monitoring Report only 10% of aid to basic education is spent via direct budget support, amounting to just over $400 million per year. 80% of this could reasonably be assumed to be supporting teacher salaries, meaning that a total of $320m per year is available, in countries deemed eligible to receive support in this way. A further 34% of aid to basic education is in the form of 'sector programme support' to education ministries- equivalent to $1.3 billion per annum. There is no data on how much of this is available for recurrent costs/teacher salaries, however, if we assume that 1/3 of it is, this means another amount equivalent to $440 million per year. Adding these shares together, we come up with a figure of just $760m a year in support to teacher salaries – around 17% of total aid to basic education. Even if donors were to increase aid to basic education to meet the external financing requirement for primary education alone ($9 billion per annum) keeping the shares the same, this would

Could do better – Mali's experience of aid to education

Mali is one of five Francophone African countries that have around a million children out of school. It needs to recruit around 40,000 teachers between now and 2015 to meet increased demand and replace teachers leaving the profession. Currently there is just one teacher to every 53 primary school pupils, and one to every 70 children of primary school age.

There have been efforts to increase teacher numbers but lack of resources means that these have to a large extent been at the expense of quality. More than four out of ten teachers have not even completed junior secondary schools, and nearly six in ten have no teaching qualifications. In community schools, where salaries are much lower than in public schools, the statistics are even more stark: nearly six in every ten teachers have not completed junior secondary school, and as many as nine in ten have no teaching qualifications. The government's response has been to implement a programme called SARPE (*Stratégie Alternative de Recrutment de Personnel d'Enseignement*, SARPE) which trains teachers in just 90 days, putting them into the classroom in half that time.

"What is clear is that there is a terrible lack of teachers…SARPE is producing what is possible, not what is needed. You cannot train a teacher in 45 days with a magic wand. These poor teachers, who can't really teach, are stood in front of a class of 80 to 100 pupils and told to get going with no materials"

Kady Baby, Forum of African Women Educationalists coalition/coalition EPT

Yet, despite these evident pressing needs, Mali is struggling to secure aid to improve and expand its education system. Mali's plan for the Fast Track Initiative (FTI) was endorsed in September 2007. For 2008 and 2009, $8.7 million was committed from the FTI Catalytic Fund – nowhere near enough to fill the education financing gap (approx $40 million in 2008) as this initiative is intended to do -– a terrible indictment of how donors have failed to keep the Dakar promise that 'no country committed to EFA shall suffer through lack of resources'.
Fifteen donors provide aid for education in Mali, but the vast majority comes from just two donors. Canada and the Netherlands together provided 76% of all education aid and 95% of the aid for basic education in 2006. Other donors need to do more to fill the gap.

Donors also fall short on committing their aid to government priorities and programmes, through sector budget support, and budget support to allow the government the funds it needs to invest in recurrent costs like teachers' salaries. Only 13% of education aid in 2006 was delivered via sector budget support (SBS), and Mali also receives very little general budget support. In 2006, only six of its 20 donors gave any general budget support. In total in 2006, Mali received $140 million of aid as general budget support in 2006, just one-sixth of all its aid.
Moreover General Budget Support to Mali has been highly unpredictable over the last five years and looks set to continue to vary immensely year on year. There is a need for donors to not only improve the disbursement of their aid, but to provide more budget support over a long term basis in a predictable manner. Until the financing gaps are filled, on a basis that allows Mali to hire teachers, it is clear that the education system will be hobbled by serious problems, with devastating effects for a generation of learners.

Summarised from *Delivering Education Aid in Mali* (2008),Oxfam Research Report. Oxford 2008

mean that around $1.5 billion would be available to developing countries struggling to increase the teacher workforce – surely far less than what is needed.

This problem is compounded by lack of predictability and short-termism. In most donor countries, aid budgets are appropriated annually, leaving them unable to pledge support formally over the medium term. Aid allocation criteria are sometimes not well defined and vary over time, and donor agencies are increasingly required to demonstrate how past aid has been used before making longer-term commitments for the future. Ironically this more cautious approach ensures an efficiency loss - the bilateral aid tends to be granted only on a 1-2 year basis which ensures it cannot be spent on recurrent costs like expanding the teacher workforce, because recipient countries cannot take the risk that insufficient funds might prevent them from financing the recurrent budget in future. Countries' lack of confidence in the predictability of donor support is starkly illustrated by the fact that around half of FTI Catalytic Fund monies are used for the procurement of textbooks, and just 13% is used for teacher salaries[9]. While textbooks are of course a crucial aspect of quality education, these proportions are the reverse of what would be expected to reflect actual priority expenditure.

Moreover, it seems that countries facing the biggest challenges in meeting the teacher gap are not a priority for donors. The 17 countries identified as 'challenged' in providing enough teachers to achieve universal primary education, received $797m between them in 2006 – this is around 18% of aid available to basic education that year. The 8 'most challenged'[10] countries received just $211m – just 4% of total aid to basic education. These 8 countries collectively need to increase their teacher stock by almost 300,000 between now

and 2015 as well as retaining and motivating their existing teaching workforce.

In light of the current crisis, donors much change their laissez-faire approach, to set out what they are going to do about the teacher crisis. All donors, even those committing close to their fair share of financing for basic education, must explicitly state their contribution to solving the teacher crisis.

In particular donor countries need to:

•Specify how many of the 18 million new and replacement teachers they will assist governments to train and recruit
•Specifiy how many of the 3.7 million new teachers they will assist governments to employ and retain

There are a number of data and methodological challenges in calculating a 'fair share' of the teacher gap for donor governments. However, the example below illustrates how many teachers each donor government should be helping to provide if donors were responsible for half of the totals. The UNESCO Institute of Statistics and donors should work together to derive specific 'fair share' targets for each donor to strive towards achieving.

Donor countries need to set out how many teachers they are going to help train and recruit and for how many they will meet the full employment costs, and in what countries. Anything less will mean they are paying lip service – not only to the teacher crisis but also to the hope of Education for All. Developing countries need to ensure their national education plans are based on the number of teachers required to meet EFA goals with a maximum class size at least of the interna-

Example model of fair share commitments to meeting the teacher gap based on 50% split between external and domestic financing.

Country	Donor GNI as % of Total OECD GNI	**Fair share of 9 million teachers to be trained with external finance**	**Fair share of 1.5 million teachers to be employed with external finance**
Netherlands	2	180,000	30,000
Norway	1	90,000	15,000
Sweden	1.1	99,000	16,500
United Kingdom	7.1	639,000	106,500
Luxembourg	0.1	9,000	1,500
Ireland	0.6	54,000	9,000
New Zealand	0.3	27,000	4,500
Canada	3.7	333,000	55,500
Belgium	1.2	108,000	18,000
France	6.6	594,000	99,000
Australia	2.1	189,000	31,500
Spain	3.5	315,000	52,500
Denmark	0.8	72,000	12,000
Finland	0.6	54,000	9,000
Switzerland	1.2	108,000	18,000
Germany	8.6	774,000	129,000
Japan	13.1	1,179,000	196,500
Portugal	0.5	45,000	7,500
Austria	0.9	81,000	13,500
Greece	0.7	63,000	10,500
United States	38.8	3,492,000	582,000
Italy	5.4	486,000	81,000

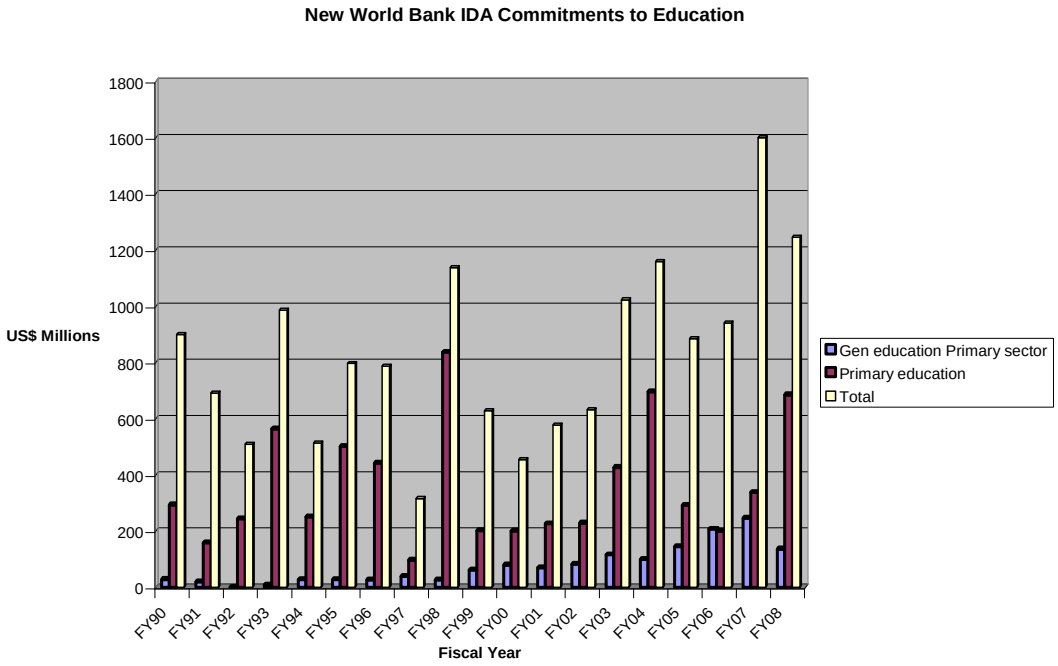
tionally recognised 40:1 ratio. The commonplace underestimating of costs in national education plans submitted to donors through FTI must stop, and all plans submitted need to explicitly set out target figures for the training, recruitment and employment of the relevant number of teachers.

Just as the 2005 gender parity in primary and secondary target has already been missed, Education For All will not be achieved by 2015 if this situation persists. The need for teachers is great and urgent. Donors must move teachers centre-stage in their efforts to achieve Education For All. Indeed they should prioritise predictable financing for recurrent costs including teacher salaries, given the constant negligence of this dimension in the period since 2000. And they should ensure that aid targets countries where most teachers are needed. To demonstrate their commitment to tackling the teacher crisis, donors should make a public declaration of how many teachers they will assist countries to hire and employ, and make strong efforts to ensure that they support their 'fair share' of the total needed in low-income countries.

Missing the Mark: the World Bank's misplaced priorities

The World Bank has been a major funder of basic education in low-income countries through its IDA concessional loans. A recent paper from RESULTS has shown that this may, however, be in decline (see box).

In recent years broader trends in Bank lending for basic education seem to indicate a shift away from direct investing in primary education. Bank investment in primary education appears to be waning, with support for primary education from IDA decreasing since 2002 – a 13% decline in nominal terms over three-year averages 2002-2004 and 2005-7. The above chart represents new IDA commitments to the World Bank's education projects from 1990 to 2008. The data indicates several things:



1. Overall education investments at all levels, peaked in 2007 at around $1.6 billion.
2. General education (education projects implemented through other sectors) as a share of total education lending has also increased – 50% of the General Education subsector is typically said to go towards primary. The overall trend is therefore an increase in primary education projects being implemented through other sectors.
3. Primary education projects (through the education sector, or Human Development Network) have decreased as a proportion of total education investments since 2004, with the exception of Fiscal Year 2008.

In 2008, the Bank did invest over $600 million directly in primary education – however $600 million went to just one country, India, for its Elementary Education Project, while, according to the Bank, only $44 million was invested in all of sub-Saharan Africa specifically through the Bank's Primary Education Projects.

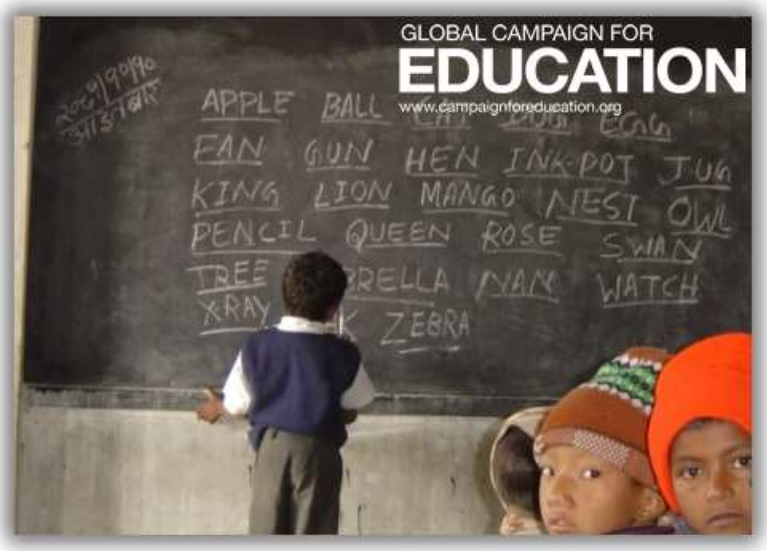
And by excluding last year's unprecedented investment in India's primary education and focusing in on the last decade, a worrying picture emerges about the World Bank's role financing basic education. Since 2004, investments in primary education have not only decreased in real terms but they have also decreased as a percentage of all education investments. If this trend is to continue, without adequate financing from the world's largest external financier of basic education, the recent gains in school enrollment, not to speak of the quality of education, may see a reversal.

Source: RESULTS World Bank Education Overview 2008

Perhaps to justify its own actions and those of the more laggardly donors, the Bank is now increasingly developing the argument that education, and quality education in particular, is not so much dependant on resources as it is on efficient management and institutional reform. For example, a recent World Bank publication[11] stated "there is no relationship between spending and student performances across the sample of middle and higher income countries with available data. Investigations within a wide range of countries, including a variety of developing countries, further support this picture… The effects of lack of substantial resources, and the impact on class sizes in particular, has been found across the developing world, including countries in Africa, Latin America and Asia."

Of course, some countries are cheaper than others – the cost of a car in Norway or UK is more than the cost of the same car in New York. However this merely reflects the cost of living and manufacture in those countries. It does not mean that there is no relationship between the quality of car and what you spend on it. This underplaying the importance of resources helps to deflect attention from the dire financing gaps and broken commitments, while paving the way to "pragmatic or realistic policies" which are no longer defined by EFA Goals but by cost effective administration of limited budgets. For the world to achieve EFA requires external and internal resources and donors need to back up their promises with resources – eight years after Dakar pretending that resources aren't the real issue is counter-intuitive.

This lack of emphasis on resources is not without effect. The share of national income devoted to education in developing countries decreased between 1990 and 2006 in 40 of the 105 countries with data[12]. When one considers the shocking North-South education expenditure imbalance – less than $40 a year spent per primary student in Congo against close to $10 000 in Luxembourg; Western Europe alone accounting for 55% of the world's total spending on formal education although they represent less than 10% of the 7-18 school age population – this focus on reform over resources appears all the more partial and specifically tailored to the "poor country" profile. Indeed, another basic underlying philosophy permeating the World Bank's advice to those countries facing the most dire challenges is that government budget cutting and reform for more "cost effective" administration is an infinitely wiser exercise than expecting the international community to finance education gaps to honour the Dakar promises.



The recommended reforms that substitute for sustained external financing are remarkable for their uniformity of approach. One recent study of 45 national education plans by UNESCO's IIEP[13] has confirmed the striking similarity in policy approaches with, as a common denominator, a constant lack of attention paid to social context and democratic political process. Elections, collective labour bargaining and any other type of national level popular consultations and mobilizations are systematically viewed by the World Bank as hazards and disturbances to the smooth implementation of the sector plans.

As a means of constraining governments' ability to adopt education policies that might respond to such concerns and cause high levels of public spending on education, specific governance reforms are instead prioritized. In all 45 education plans mentioned above, there is a considerable commonality of approach, with every one adopting the policies outlined below. In principle, such reforms could be a force for good, and some have in fact been actively put forward by many within the GCE membership with positive motivation and good intent. However, in practice their promotion has in some cases lead to undesirable effects.

Decentralisation

Decentralization is without a doubt the single most important component of all the sector plans' investment programs. Decentralization components account for a record 90% of World Bank lending to primary education[14]. Accordingly, most education plans promote the creation or the strengthening of formal administrative structures such as School Committees, village education committees or PTAs to facilitate parental and community involvement in school management. Such structures could and should lead to more responsive, accountable education systems that are better attuned to the real needs of the communities they serve. Evidence based country level information, however, largely documents the fact that these new formal "empowerment" strategies have rarely managed to overcome deep imbalances in power relations linked to wealth, gender and other socio-cultural inequalities[15]. Advocacy for strong public policies is needed, to transform formal mechanisms or symbolic calls for community participation into effective participation based on representative and democratic

principles. Otherwise, the decentralisation process is not only liable to increase inequalities but may also mainly used as a strategy to short circuit, bypass or contain the existing social, political and labour associations, such as Teachers' Unions for example.

School Based Management

Developed in the early and mid nineties, the school-based management system is based on the assumption that autonomy and accountability will give parents greater freedom to choose the best performing schools. Many civil society organisations advocate such approaches and support their implementation with the laudable intention of encouraging positive school-community dialogue for the benefit of pupils and communities. Unfortunately, the evidence suggests that too often, and of course against the intention of CSOs, the more direct effect of this approach in environments characterized by deep rooted geographical, and socio-economic disparities and unequal access to resources and information, is to privilege the most wealthy sections of the population, and risk of creating a network of first and second quality public schools[16]. It is also worthwhile to note that autonomy is always defined and implemented as moving towards political and financial independence from the government's central and regional authority, and almost never extends to the promised positive educational or pedagogical autonomy through a richer and more culturally relevant syllabus, for example.

Privatization for all and low cost schools.

The forces pushing towards increased privatization of the public sector are hardly covert. With World Bank country assistance strategies and PRSPs openly highlighting the need for parastatal reform and privatization, it would be surprising for this not to have implications towards the shaping of the educational strategies. And it is indeed difficult to find a single national education plan which doesn't include a move towards privatization or "public private partnerships" as it is often called.

At the same time, the consequence of state inability to resource the public school system has led the rapid emergence, in many developing countries, of low-fee private primary schools operating as small businesses outside any regulation from government authorities. Although thriving in the voids created by government neglect and disengagement, this low-fee private provision of education for the poor is presented as a promising force for greater quality education and even equity through increased opportunities and choice. The World Bank's 2006 Education Sector Strategy Update [17] states that "'Increased competition among public and private education institutions… is providing more incentives to improve quality. The Bank can help countries investigate the market for education, develop an enabling environment for private participation and competition, and align private provision whenever possible with equity principles laid out in national education strategies'. While most studies show this new type of education provision is growing in the slums of major urban concentrations of Asia and Africa, precisely because of the absence of choice, this does not alter the fact that changes in the educational landscape are indeed mirroring the World Bank calls for private intervention. But the record of such schools on providing quality education has been patchy, and their promotion has of course had a detrimental effect on equity of provision. This has been highlighted by the 2009 EFA Global Monitoring Report as a distraction from the main issue of ensuring that financial resources are available to address the failure of state systems to meet the needs of the poor.

Undermining teachers instead of supporting

If one is to judge by the importance and urgency given throughout the World Bank evaluation and implementation reports[18], the teachers' wages issue is presented as the single most formidable threat facing education plans worldwide. Numerous comments relate directly to the purported dangers to the education plan's sustainability by what is considered the excessively high level of public spending on teachers. The World Bank's Project Appraisal Documents go to particularly long efforts to explain the irrationality of any "abnormally high" spending compared to the official per capita GDP figures recommended by the FTI benchmarks. Reform initiatives and investment reallocations are aimed at reducing the share of public spending represented by wages, subtly linking the cost of teachers to the education sector's financial difficulties before making this expense responsible for any future deterioration in education quality. The box below features an example from Kenya, which highlights how the World Bank and IMF work together to constrain countries' ability to employ teachers. The role of the IMF is examined in more detail in the subsequent section of the report.

Governments are all the more encouraged to limit spending on salaries, since numerous reports and expert surveys commissioned by the World Bank are at pains to explain how little impact factors like trained teachers or class sizes have on the quality of education[19]. Quite logically, those who devalue the importance of professional and quality training are also enthusiastic advocates of reliance on contractual teaching staff and untrained, para-professional teachers. This ignores the fact that professionally trained teachers are part of the solution, not the problem and that this policy will have a detrimental effect on quality. Indeed, the World Bank's own research has concluded that the employment of 'contract teachers' has a direct causal link to a decline in the quality of teaching – due to reduced attractiveness of the profession, leading to lower quality applicants, and increased absentee-

ism as a result of fewer incentives and lower job security[20].

In many developing countries of the world, teachers' unions have traditionally been major players in the education field but also important actors of the struggles for democracy and human rights. As frequent well organized opponents, for obvious reasons, to wage caps and certain effects of decentralization, this major partner is almost categorically excluded from most educa-

Kenya's struggle for teachers

Upon arriving in office (boosted by school fee abolition as a popular item on the electoral programme), the Kenyan government was quick to present evidence of their firm commitment to the development of a "sound and efficient" strategy for social but also economic development. This was done through the preparation of the Economic Recovery Strategy for Wealth and Employment Creation (ERS), Kenya's chosen name for the PRSP which led the way, in November 2003, for a PRGF agreement with the IMF worth $252 million. This agreement was followed one month later by a letter of intent sent by the Minister of Finance to the IMF, detailing the policies Kenya was promising for the future. Among the three main objectives fixed for compliance with the IMF's general economic frame of mind, the Kenyan government listed high on its agenda the promise of "reducing the wage bill as a share of total expenditure by reforming the wage setting mechanism for public servants and continuing civil service reforms." As a large scale "teacher containment" testing ground, the Education Sector Plan (KESSP) bears witness to this promise.

The justifications for most of the recommended measures concerning teacher management are based on the following argument: "A major concern is how to **contain** the teacher numbers and the wage bill from escalating as enrolments at the primary level increased slightly, and the demand for admission to secondary education grows substantially as bigger numbers of primary pupils reach Standard 8." The containment measures include the following:

- Freeze on normal recruitments: According to the World Bank, "At the primary level, the policy should require the current total number of teachers is strictly limited"
- Increasing the Pupil:Teacher Ratio: For the World Bank, "the overall number of teachers **is not a major constraint**, even though the pupil-teacher ratio has risen from 31:1 (end of 1990s) to 43:1 (in 2005)." The above PTR ratio's degenerative growth does not appear to be any matter of concern to the World Bank, quite to the contrary, as the policy requirements go on to add that this equitable deployment should be calculated "on the basis of enrolment at **one teacher for up to 50 pupils**". This amazing proposal is backed by very serious research: The World Bank adds that "the economic analysis suggests that the following policies (50 to 1 PTR) are needed to reach the goals of the education sector program **in a fiscally sustainable way**."
- Increasing the teaching load through **Polyvalent teachers (**required to master and teach several subjects), **Multi-grade teaching**, **Teacher Sharing** (between several schools), **Performance rating** and **longer working hours** (At the secondary level, the World Bank suggests the new staffing norms include "an increased teaching load from 18 hours per week to at least 30 lessons of student contact.")
- Hiring of part-time and contract teachers: When all measures of teacher containment fail to prevent cases where recruitment becomes an unavoidable necessity, the last option available to keep the budget down is to design "special" contractual terms of employment. As often, the recruitment of this under qualified staff is closely linked to the decentralization policies, attributing more responsibilities to regional, provincial and local authorities, including the one to hire teaching staff. Hence the World Bank strongly recommends that "BOGS should be empowered to employ fixed-term contract or part time teachers to meet teacher shortages and local needs.".

The only teacher management advice not (yet) directly applied by the government concerns the rather radical suggestion made by the World Bank that "A policy should also be developed for retrenchment of teachers whose teaching load cannot be raised sufficiently."

This is especially alarming as it occurred in a context where donors promised to get behind efforts to achieve EFA, In a country which demonstrated strong leadership on expansion of education. Instead of donors providing the funding to allow this to happen (and therefore bring in the required numbers of extra teachers), they actively tried to restrict recruitment of teachers. This inevitably drove class sizes up, and then unashamedly the same actors used the example to highlight a false quality/access trade off. If donors had embraced the efforts in Kenya with predictable resources and supportive polices to allow significant teacher recruitment, a huge increase in literacy and learning outcomes for all could have been achieved with all the health and economic benefits that would create.

tion consultation processes and all forms of policy engagements at national level. This strategy of containment by the World Bank blocks potentially important contributors to the shaping of EFA development. It is therefore unsurprising that strategies accompanying the education plans – such as outsourcing labour relations and contracting - are seen, justifiably, by most teachers' unions as an indirect means of weakening their collective voice and bargaining power at national level.

And latterly, the World Bank has played an increasingly problematic role vis-à-vis the EFA Fast-Track Initiative. In its role as trustee of the FTI Catalytic Fund, it has been entrusted with the responsibility of ensuring that funds are disbursed in a timely manner following approvals and allocations from the Catalytic Fund Committee of FTI. However, at the most recent round of FTI meetings in Paris there was widespread disappointment - from the core "committed" donors especially - on the slow pace of spending out of the Catalytic Fund. The damaging facts cited were a roughly 5% initial spend rate (actually $3.2m on $519m) on allocations approved 8-12 months ago, an overall cash balance of $700m, and perhaps most problematic, the Dutch development minister having to explain to Parliament that he would miss a national education spend target as a result of slow FTI uptake. This embarrassment to FTI has been caused largely if not exclusively by the problem of the World Bank imposing ex-post conditionalities during signing of trust agreements, to satisfy fiduciary concerns about procurement of goods and services to achieve the FTI plans, most recently, and damagingly in Mozambique.

Education For All or Universal Primary Education?

The 2000 Dakar Framework for Action, provided a remarkably clear and comprehensive definition of the wide-ranging issues and long term strategies needed to be developed and implemented with active civil society participation to address and meet the six educational goals. These landmarks are unfortunately of little help today. Indeed, if some residual Dakar structures remain, most EFA Forums and National Action Plans have been discarded and replaced by sectoral approaches. This occurred on the basis that they did not meet the "credibility criteria", as defined according to the partial but powerful judgment of those who had promised to finance them through the mechanism of the EFA-FTI. Essentially based on the MDGs, many such education sector plans can be seen as a limited instrument when compared with the scope of EFA plans, which were not only inclusive of the six goals and hence not limited to the formal education sector but also strongly based on a multi-sectoral approach involving all ministries related to the challenges of life-long education. In a majority of FTI-endorsed education plans, poverty, public health, child nutrition, social issues, transportation etc are not addressed. Moreover, the sectoral plans themselves fail to address all challenges to achieving even the limited goal of universal primary education:

•On the critical issue of special needs education, only ten of the plans endorsed by the FTI between 2002 and 2006 included a strategy for children affected with disability, and five of them don't even raise the issue of disability[21].

•A review of 12 country plans revealed that five made no mention of HIV and AIDS, and only four had specific cost estimates. Another follow-up review of 8 FTI-backed plans showed that three had no HIV/AIDS component, even in two countries suffering from a situation of generalized HIV epidemic[22].

•Over half of the 28 reviewed plans lacked a strategy for girls' education, and the few that did were reduced to an uncoordinated and unprioritised set of gender related interventions.

Contradicting commitments: The IMF's role in constraining public expenditure

The IMF has long been an enemy of social spending and especially on public sector wages. As Structural Adjustment gave way to the Poverty Reduction Growth Facility, this remained a key aim of IMF macro-economic policy advice.

The public sector wage bill is the largest recurrent expenditure on the national budget. The wage bill covers salaries for teachers, health workers, ministry staff, and the police amongst others. How much government can afford to spend on the wage bill depends on the amount of resources available through the national budget. It is wise public resource management to place a limit in the form of a ceiling on the public sector wage bill ensuring that Government does not spend excessively on salaries. Overspending on wages can make fewer resources available for other priority sectors and may jeopardise macroeconomic stability.

To ensure governments hold to the wage bill ceiling the IMF in the past tended to set it as a conditionality. Failing to meet this conditionality is enough ground for the IMF to postpone future loan disbursements and signal to donors and creditors that the country is not economically stable. However, when government spends less on the wage bill it has a direct impact on teachers because they make up the single largest group on the public sector wage bill. In Malawi teacher salaries make up 37 percent of the total wage bill and up to 35 percent in Sierra Leone and Mozambique.[23] IMF-advised wage caps were typically very low, at around 8% of GDP, and inflexibly applied, leaving countries unable to find sufficient fiscal space to expand the teaching profession in line with demand. In some cases, this left governments unable to take on teachers which it had invested considerable funds in training, such as in Zambia in 2004.

During 2004 and 2005, a number of civil society reports demonstrated that IMF-advised wage bill ceilings were blocking teacher recruitment and hiring in African countries[24]. After considerable pressure from civil society, building to a crescendo with the release of ActionAid International's report Confronting the Contradictions at the World Bank/IMF Spring Meetings 2007, the IMF agreed to reduce its use of wage bill ceilings. The IMF's agreement to reduce or eliminate the use of wage bill ceilings was an important policy reform which raised hopes that governments, with donor support, would be able to finance the recurrent costs that are teachers' salaries, which are central and critical to a functional education system.

Except waiving the wage bill ceiling instrument has proved to be an easy concession for the IMF because the very restrictive inflation and deficit spending targets the IMF sets in PRGF agreements continue to hold public spending down, even while wage bill ceilings are no longer being applied. These macroeconomic policies have a "divider" effect diminishing aid effectiveness; on the one hand, through the deficit spending target, the IMF continues to cap the government's available budget for teachers even in the absence of a formal wage bill cap. On the other hand, complying with single digit inflation targets makes it impossible for governments to expand short and medium term spending to invest in long term development gains achieved through education. Without **both predictable aid flows from donors** to cover teachers' salaries (70-90% of education sector recurrent costs) **and flexible, development-based macro economic policies**, EFA goals will not be achieved.

One irony here is that the donor community which rallies to get the resources to governments in developing countries to scale up the education sector are the same donors that empower the IMF to play a signalling role, determining which countries are and are not credit worthy. Many developing country governments feel they must enter into IMF PRGF agreements in order to get IMF approval as credit worthy and thereby qualify for consideration by donors, but the policy conditions attached to the PRGF condemn the local economies to low inflation and no-to-low deficit targets which simply will not permit the expenditure of aid dollars on the intended sector. Until donors collectively insist on macroeconomic alternatives that enable and embrace the needed public investments to achieve education and health services on a proper scale, or collectively agree to disempower the IMF as the world's sole arbiter of macroeconomic stability, even increased aid flows will not resolve the urgent humanitarian crisis of surviving in poverty with no services.

This contradiction has gone ignored for too long partly because the donors have not developed systematic attempts to provide solutions to the teaching crisis. National country-developed targets for teacher training, recruitment and retention, supported by donor countries would bring these issues out into the open and force a better alignment for IMF and World Bank policies to support the Education For All goals and the growth that their realisation would lead to.

Conclusions and Recommendations

The global compact on education seems to be slipping further from our grasp just as it ought to be within reach. At this pivotal moment, it is vital that the international community, the donors, the World Bank and the IMF, radically rethink their policies and practices to ensure that governments are given the support and advice needed to achieve Education For All. The High-Level Group meeting is ideally-placed to challenge these key actors to ensure that they support, rather than undermine, the drive to achieve EFA.

The Education For All High-Level Group should:

- Oblige donors to declare how many professional teachers they will assist countries to train, hire and retain. The UNESCO Institute of Statistics and donors should work together to derive specific 'fair share' targets for each donor to strive towards achieving.
- Demand that the World Bank and IMF to re-orient their policies and practices to support quality public EFA and the

expansion of the professional teaching force

- Deliver specific actionable realistic commitments through a strengthened accountability framework
- Support a radical overhaul of the global system for financing education, to ensure timely and sufficient disbursement of predictable funds, supporting the whole EFA agenda.

Glossary:

BOGS	Boards of Governors
EFA	Education for All
EFA-FTI	Education for All – Fast Track Initiative
FTI	As above (EFA-FTI)
GCE	Global Campaign for Education
GDP	Gross Domestic Product
GMR	Education for All Global Monitory Report
IDA	World Bank's 'International Development Association'
IIEP	UNESCO's International Institute of Education Planning
IMF	International Monetary Fund
PGRF	Poverty Reduction and Growth Facility
PRSPs	Poverty Reduction Strategy Papers
PTA	Parent-teacher associations
PTR	Pupil: Teacher Ratio
OECD	Organisation for Economic Co-operation and Development
UNESCO	United Nations Educational, Scientific and Cultural Organisation

Footnotes

[1]Education For All Global Monitoring Report 2009. UNESCO, Paris. Quality Education For All: FTI Progress Report. Washington DC. 2007

[2]Estimate in EFA Global Monitoring Report (2008) '*Education for All by 2015, Will We Make It?*' Paris. UNESCO

[3]This apparently contradictory statement derives from the fact that although the USA gives by volume one of the largest contributions to basic education, it is still a tiny amount relative to its national wealth

[4]Estimate in 'From Commitment to Action: Education'. UK Department for International Development/Treasury. 2006.

[5]'Last in Line, Last In School' Save the Children. 2007

[6]Source: OECD DAC Creditor Reporting System.

[7]EFA Global Monitoring Report (2008) '*Education for All by 2015, Will We Make It?*' Paris. UNESCO

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[18]See Kenya example in text box

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