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## Editorial

### Aid, education policy, and development

#### ABSTRACT

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This paper discusses the recent history of education aid policy, and introduces the studies that constitute this UNU-WIDER Special Issue. It highlights an important shift in policy-thinking in the international aid architecture that has dominated the global education aid agenda since the early 1990s. It argues that Rawlsian principles of social justice, human rights perspectives, and advancements in economic theory that emphasize the role of human capital in development have been central in that process. The studies of this Special Issue aim to address the general question of how aid can better support the collective actions that seek to improve education systems in developing countries. Overall, they provide an analysis of key policy strategies that can improve the functioning of education systems and the quality of services, and discuss major challenges for the future global education agenda.

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## 1. Introduction

The normative principles, institutional structures and legal systems that facilitate the provision and utilization of education services—what constitute education policy—have long been recognized as instrumentally important for human capital formation, and individual agency (Schultz, 1960). A sound education policy that facilitates the advancement of knowledge and the process of technological and scientific innovation is essential for economic growth and the development process of nations (Barro, 1991; Rebelo, 1991; Benhabib and Spiegel, 1994; Barro and Sala-i-Martin, 1998).

A crucial part of a successful development strategy largely depends on how effectively a country utilizes its abundant resources or ‘factor endowments’ for production and exchange in the global economy. For developing countries in particular, which often exhibit higher birth rates and family-oriented social and economic structures, human resources represent a very important factor endowment for production. However, it is not until they are upgraded through human capital investment, that they can more effectively support the development process (Haq, 1996; Lin, 2008). It is here where the design of effective education policies becomes critical.

Developing countries face; however, major challenges. These include, inter alia, considerable budgetary constraints in contexts of large unserved (or underserved) populations; weak bureaucratic capacity to manage programmes and policies; limited capacity to provide good quality services; competing needs and interests in pursuing education policy vis-à-vis other policy priorities; and social norms and economic incentives that prevent the full utilization of education services. In such contexts, aid to education

can be justified under economic principles, given the instrumental role that education plays in widening people’s opportunities and breaking the structural causes of poverty (Barham et al., 1995), and also as a fundamental human rights (United Nations, 1993).

Since the World Declaration on Education for All, adopted by UNESCO, UNICEF, the World Bank and other multilaterals, as well as by 155 countries and 150 governmental and non-governmental organizations (NGOs), much work has been undertaken to improve the effectiveness of aid to education (UNESCO, 2007). Greater engagement among multilateral and bilateral organizations in adopting broader educational frameworks has contributed to a shift in the focus from vertical and supply-driven strategies towards the inclusion of demand-related considerations, vertical and horizontal inequalities, and relationships with external actors, including the private sector and NGOs. These processes paved the way for the adoption of the Dakar Framework for Action that reaffirmed the commitments of the international community to achieving Education for All by the year 2015 (UNESCO, 2000) and also the introduction of global initiatives, such as the Millennium Development Goals (MDGs), in particular Goal 2, achieve universal primary education.

These global initiatives changed the structure and composition of aid to education. As discussed in Section 2, over the past 15 years, aid to education, in particular higher education but also primary education, has increased steadily. Donors and actors participating in the sector have also increased. More actors and larger aid budgets have, however, created costs for recipient countries. Issues of lack of harmonization and alignment of donors with domestic policy priorities have dominated the discussions around aid effectiveness, first captured in the Paris Declaration on aid effectiveness in 2005, and then reaffirmed in the 2008 Accra

Agenda for Action that aimed to accelerate progress towards ownership, harmonization, alignment, results and mutual accountability (OECD, 2008; Wood et al., 2011).

Now, at the outset of the new Sustainable Development Goals (SDGs), and more specifically, Goal 4—ensure inclusive and equitable quality education and promote lifelong learning opportunities for all—a more complex set of policy strategies will be needed to achieve the much more ambitious targets of SDG4 by 2030. How could donors better engage with developing country governments? How can education aid more effectively help shape domestic policies to improve education quality (and achieve the SDGs)? These are key questions for the future post-2015 education agenda.

This article provides a discussion on the recent history of education aid policy, and introduces to the reader to the studies that constitute this UNU-WIDER Special Issue. Overall, the Special Issue aims to address the general question of how aid can better support the collective actions that seek to improve education systems in developing countries. This is not an irrelevant question. Despite that developing countries have increased their domestic revenue capacity to finance education spending, aid still contributes, on average, to one-fifth of the education budgets in low-income countries. In some African countries, including Mali, Rwanda, and Zambia, the contribution of aid to government education budgets goes up to nearly 50% (UNESCO Institute for Statistics, 2011).

The six articles that constitute this Special Issue contribute to the existing literature on education aid in two important ways. First, they discuss past and current trends in education aid, highlighting the role that bilateral and multilateral organizations have played in that process. Second, they assess more specifically the policy strategies and design features of relevant education programmes that have proved to be effective in improving education quality in developing countries.

The first set of issues is addressed in the studies by Riddell and Niño-Zarazúa (2016) and Heyneman and Lee (2016). Riddell and Niño-Zarazúa provide a critical examination of many decades of foreign aid to education, highlighting the gaps between what aid actually does and what it could potentially achieve, especially in relation to its contribution to improvements in educational quality, whereas Heyneman and Lee provide an analysis of the activities undertaken by bilateral, multilateral organizations and private donors in education aid, examines their effectiveness, discusses major problems in implementing educational programmes and suggests ways to improve aid in education.

The other four studies in the Special Issue focus on the second set of issues. The study by Birchler and Michaelowa (2016) analyses the effect of education aid on primary enrolment and education quality. More specifically, they highlight the complementary relationship between primary and secondary education, whereby if funding for primary education is increased while supporting secondary education, it further enhances primary education enrolment. Masino and Niño-Zarazúa (2016) undertake a systematic review of the literature to uncover the types of education policies that improve student learning and achievement. They identify three main drivers of change in the context of education policies: (1) resource provision and capability-enhancing interventions; (2) household- and individual-level incentives; and (3) participatory and management innovations.

The study by Jones (2016) examines whether and how aspects of classroom composition, including class size and the achievement distribution of classmates, may affect individual learning in the context of Uganda, a country that has been historically dependent on aid to deliver education services. Finally, the study by Kristjansson et al. (2016) provides an analysis of the factors that influence the cost effectiveness of school-feeding programmes in low- and middle-income countries. This is a relevant issue given

the well-established link between malnutrition and poor cognitive development and learning during early childhood and school years (Glewwe and King, 2001; Grantham-McGregor et al., 2007).

This special issue comes at an important time in the debate around the post-2015 education agenda. The debate on the role of education in economic and social development, and on the links between education and the other sustainable development goals is intense within donor agencies and, not least, within developing country governments and civil society.

The remainder of this article is organized as follows. Section 2 presents an overview of the recent trends of education aid, paying particular attention to a fundamental transition that began in the 1990s, and which moved aid policies and philosophies from a 'productivistic' approach, which emphasized support to physical infrastructure to foster economic growth, to a more 'developmentalist' perspective of development that gave a stronger emphasis to investing in human capital. Section 2.1 presents an overview of the studies that constitute this Special Issue, and which examine some important shifts in education aid policy-thinking which recognize the importance of adopting the Paris-style aid modalities, and the need to focus on education quality and learning. Section 3 concludes with some reflections on future global education agenda.

## 2. Education policy and policy approaches in international aid architecture

Since the post-war era, there have been important shifts in the provision of aid to support education policy.<sup>1</sup> Infrastructure and the 'hard' sectors were favoured by donors in the earlier decades, and the 'softer' sectors, in particular education and health became only dominant until the 1990s and first decade of this century. During the 1960s, education aid constituted only 8% of total aid flows, increasing just marginally to around 11% during the 1970s. The priority given to education was again reduced from the late 1970s through 1980s, something that reflected, as Coombs (1985) points out, the joint view of donor agencies and developing country authorities that important competing priorities in physical infrastructure and labour productivity needed to be addressed to improve the competitiveness of developing countries.

Two central features characterized what I refer to as the 'productivist' approach to education aid during the 1960s, 1970s, and early 1980s. First, education aid was largely concentrated on building physical infrastructure, and providing equipment and technical assistance to developing countries, many of which had recently gained independence from colonial rule.<sup>2</sup> Tilak (1988) shows that two-thirds of World Bank educational lending during the 1970s was directed to the construction of schools and around 30% was used to purchase equipment. Aid efforts concentrated in strengthening the supply-side capabilities of countries to enhance labour productivity, and economic growth. These activities included the support of workforce development plans, which emphasized vocational training, and engineering education (Heyneman, 2004).

The second feature of the productivist approach was its strong focus on secondary and post-secondary education, including vocational training (World Bank, 1980). In fact, nearly 50% of bilateral aid went to secondary and nearly one-third to tertiary and technical education (OECD, 2012). Reiff (1983) also points out that training programmes for teachers, and learning materials were

<sup>1</sup> We adopt a definition of education policy that considers the principles of policy strategies and rules that facilitate the development of education systems as defined in Bell and Stevenson (2006).

<sup>2</sup> To illustrate, just in Africa, Cameroon, Togo, Madagascar, Democratic Republic of Congo, Benin, Niger, Burkina Faso, Ivory Coast, Chad, Central Africa Republic, Gabon, Senegal, Mali, Nigeria, Mauritania, Sierra Leone, Tanzania, Uganda, Burundi, Rwanda, Algeria, Kenya, Malawi, Zambia, Gambia, Zimbabwe, Botswana, Lesotho, Mauritius, Swaziland and Equatorial Guinea gained independence in the 1960s.

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