# BASIC EDUCATION AND THE WORLD BANK:

# CRISIS AND RESPONSE IN THE 1980S

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## ABSTRACT

Basic education is a crucial, often underfunded component of national development. Theories based on basic needs both illustrate the links between education and other goals associated with the elimination of poverty and define the types of education needed to maximise these links and advance these goals. Third world progress towards basic educational goals, as measured by first level enrolment, literacy and resources available to education, has been slowed particularly as a result of economic pressures. Measures taken by international organisations to relieve these pressures have not adequately protected the poor; and in some cases have adversely affected the maintenance of systems of basic education.

The World Bank, as the world's largest development organisation and as one concerned with economic adjustment, is changing its policies to adapt to this situation. (These changes are taking place in an institution noted for being more oriented to economic growth than to human needs). There is, however, room for cautious optimism that trends within and without the Bank may converge to bring basic education to a higher place on the development agenda.

# PRECIS

L'éducation fondamentale est un élément crucial et souvent sous financé de développement national. D'une part, les théories basées sur les besoins fondamentaux illustrent les liens entre l'éducation et d'autres objectifs associés a l'élimination de la pauvreté. D'autre part, elles definissent les formes de l'education nécessaires afin de maximiser ces liens et d'atteindre ces objectifs. Si l'on prend comme mesure l'effectif au primaire, l'alphabétisme et les resources consacrées a l'éducation, le progrès vers l'éducation fondamentale au Tiers monde a ralenti, notamment à la suite des pressions économiques. Les mesures enterprises par des organismes internationaux pour atténuer ces pressions n'ont pas protégé les démunies et les démunis de façon adequate. Et dans certains cas les mesures ont eu un impact négatif sur l'expansion et le maintien des systmemes d'éducation fondamentale.

La Banque mondiale, le plus grand organisme de developpement au monde et un de ceux préoccupés par l'ajustement des structures économiques, change ses politiques pour s'adpater a ce contexte. (Il est à noter que ces changements surviennent au sein d'une institution plus orientée vers la croissance economique que les besoins sociaux). Toutefois, il est possible que les tendances à l'intérieur et à l'extérieur de la Banque convergent afin de donner à l'éducation fondamentale une place plus importante dans les priorités de développement

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# INTRODUCTION

## 1. PROBLEM STATEMENT

In the past, the World Bank as the leading western development agency, has upheld the notion that basic education is a basic human need, and that creating the means to satisfy this basic need is a primary goal of policy and programmes for aiding education. In many poor countries today, the ability to satisfy this need is in jeopardy as institutions and finances are threatened by changing economic conditions, by programmes imposed to help countries adjust to these conditions, as well as by other factors such as political instability and demographic changes. This thesis will discuss 1) the importance of basic education in improving the lives of the poor; 2) the threat to the attainment of basic educational goals being posed by economic crises and adjustment programmes; and 3) the extent to which World Bank policies and programmes are responding to this threat.

## 2. DEFINITIONS

a. Basic education I will use the term "basic education" in a fairly broad sense, to mean the provision of instruction within the public sector in the fundamental skills of literacy and numeracy and in basic knowledge, whether

provided to children or to adults. Basic knowledge means that knowledge which enables people to engage in productive work, to satisfy their own needs, to engage at the citizen level in the decision-making processes of their society and to have some access to their cultural heritage.

Primary education is the best known means of delivery of basic education. Another important means is nonformal education, defined as "systematic learning outside the education system as in agricultural extension, skills training and adult literacy courses" (Noor, 1981, p.9). Basic education may be delivered as a component of a larger programme designed to meet other basic needs of the population (for example, basic literacy as a part of a rural health programme) or as something autonomous.

Education, along with health, food and shelter, is one of the "necessary conditions for the enjoyment of a full life in a poor society" (Stewart, 1985, p.5). Education is closely connected with indicators of the elimination of poverty, such as increasing life expectancy and declining infant mortality; and is strongly correlated with the means necessary to achieve a full life, such as increased agricultural productivity. Unlike such activities as family food production, basic education is "an essential service provided for and by the community at large" (ILO, Employment, growth and basic needs, 1975; cited in Ghai, 1977, p.9); as well as

a form of private consumption. Basic education is also considered a human right and is mentioned in the Universal Declaration of Human Rights.

Basic education is both a means and an end - "a concept of mass education, which, while optimally flexibly useful to its recipients' productive pursuits (whatever they may be) can also be appreciated as an enriching experience in its own right and in communication with the country's particular cultural traditions and aspirations" (Weiler, 1978, p.183).

b. Economic crisis and adjustment programmes A combination of deteriorating terms of trade vis-a-vis the industrialised countries, population growth, environmental problems and political and economic hostility from the industrialised countries has afflicted many countries of the third world. This results in overburdened school systems and decreasing ability of governments to pay for education for the poorer segments of the population. The damage to education systems is often complicated by the measures known as adjustment which many countries adopt to cope with these problems.

Adjustment programmes are economic policies and plans which "embody measures which aim at achieving viability in the medium term balance of payments while maintaining the level and rate of growth of economic activity at as high a rate as possible" (Please, 1984, p.18). They may be national in

scope or targeted at specific sectors of the economy. Adjustment programmes have been associated with austerity measures which result from decreases in subsidies and social spending and which negatively affect the poor. Countries with adjustment programmes tend to suffer deterioration in their social programmes, although whether this is the result of the economic problems that led to the implementation of the adjustment programmes or the result of the programmes themselves is difficult to establish (Giovanni, Jolly and Stewart, 1987). In Cornia's contribution to this volume, he estimates that "the vast majority of developing countries have been affected by the adjustment process" (p.49).

## 3. SIGNIFICANCE

### a. Why education is considered valuable

National governments and development planners have always accorded great significance to the provision of education. Evidence of education's prominence includes the tendency of revolutionary governments including the USSR, the People's Republic of China , Iran and Cuba to launch literacy campaigns as one of their first priorities, and the attempts by many of the poorest countries to protect the vulnerable education sector when government cutbacks must be made. The respect which governments accord education is paralleled by the esteem in which it is held by the people. For example, Eisemon and Schwille (1989) note that farmers in rural Africa will forego almost all other expenses in order to pay their

children's school fees. Education is valued for moral, political and economic reasons.

### *i. Moral value of education*

Education is perceived as a human right. In the Universal Declaration of Human Rights, the right to education stands alone as Article 26, while other basic needs such as adequate food, clothing, medical care and shelter are telescoped into the phrase "a standard of living adequate for health and well-being" in Article 25. In the view of those who drew up those documents, the right to be educated and to develop one's intellectual capacities is akin to the right to freedom of religion or the right to self-determination, as something which is provided to every person, regardless of its instrumental or productive value. These statements are usually taken to refer to literacy and basic education, rather than to elite education.

### *ii. Political value of education*

Because of the moral weight of education, its provision gives legitimacy to the state or agency responsible, which explains why many new governments are eager to introduce educational reforms. Provision of mass education thus becomes part of the process of "political rationalisation", defined as "both the expansion of state authority and the expansion of citizenship links between the state and the individual" (Boli, Ramirez and Mager, 1986, p.123). Mass public

education, often with a heavily ideological component, can promote both types of expansion.

Through education, the state can provide more chances for social mobility for the individual and can compensate for the flaws of a fundamentally hierarchical society (Weiler, 1983). Education is thus a substitute for other actions which could rectify social or economic inequalities. The potential for upward mobility through the credentialling function of education is one of the most important ways in which it legitimates the state and the social hierarchy. The provision of free or cheap education can be used to placate potentially politically volatile groups, especially the urban middle classes and thus can help to ensure a government's survival.

Formal education can be used to reproduce desired values and patterns of behaviour. Schools are seen as repositories of the cultural capital of a society, which includes political values and which is transmitted from one generation to another through the overt curriculum of formal schooling. In addition to this cultural reproduction, schools can reproduce and legitimate the division of labour in a society through their sorting and selecting functions.

Education can also be used to promote a specific political culture. This may be done through the overt curriculum (for example, schools of the African National Congress, which

require students to study "The History of the Struggle") or through activities tangential to the curriculum, such as the American pledge of allegiance. Aspects of the hidden curriculum, or of the structure and administration of the school can promote certain political values, such as the school gardens envisioned in Julius Nyerere's Education for self-reliance plans, which were meant to inculcate values of community co-operation.

### *iii. Economic value of education*

The economic value of education is the reason most often cited by national planners and aid organisations to justify injecting aid dollars into the education sector. Education is both a means for the individual to raise his/her income and a means for a society to increase its gross national product and to modernise. The link between education and national economic development is still somewhat problematic (Carnoy et al., 1983) although the existence of this link has formed the basis for human-capital-based theories of education and development.

## b) Significance of this study

A study such as this one is significant for several reasons: first, since aid to education from international sources represents 9% of total educational budgets in the third world (World Bank, 1980a, p.73), studies of aid and basic education are significant for understanding and predicting the

contribution which aid to education could make to development. Second, the provision of basic education is necessary for the success of projects in other sectors of development work, particularly health and agriculture, thus the state of aid to basic education should be taken into account when planning or assessing projects in these other sectors. This is likely to become even more true in the future, as external aid for education is expected to play a critical role in adjusting and revitalising the educational systems of some of the most debt-stricken and impoverished regions of the world, especially sub-Saharan Africa (World Bank, 1989a). Third, many writers have identified the need to analyse the policies and workings of aid agencies from the perspective of the donor agency as well as that of the aid recipient in order to understand what the future may hold for third world education in light of the importance of external aid in this sector (Hurst, 1981, p.117; Weiler, 1983, pp.7-15).

Negative changes in the world economic environment such as falling commodities prices, intolerable debt burdens, declining government revenues and falling trade balances, which were once conceived of as crises, are now being seen as a long-term steady state rather than as a short term problem. Increasing poverty and declining standards of living are the most important results of this situation although they are by no means the aspects on which the greatest amount of

attention has been lavished. It is particularly important to examine the result of this situation on basic education, as education is morally, economically and politically significant and is closely correlated with many other aspects of development.

Both the current state of basic education in the third world and the Bank's pattern of lending to basic education are the result of historical situations and the result of Western involvement with the third world over several centuries. World Bank policies on education should be thought of as part of a historical continuum of western involvement in the third world as well as a response to the current global situation of human welfare and as a specific expression of World Bank economic policies.

Although this study considers the historical factors which create the present situation of education in the third world, it is essentially forward-looking, because new factors which arose in the late 1980s and at the beginning of the 1990s create a new operating environment for the Bank. These factors include the changing role of aid in a global environment which is not hospitable to human needs, and changes in the Bank's self-perceived mission which affect the Bank's policies in meeting human needs.

## 4. LITERATURE REVIEW

This review of literature will create a theoretical context for the study of aid to basic education during the current global economic crisis and adjustment to that crisis. It considers literature on the prospects for the provision of aid to education in the near future, and literature on perspectives on the role and desirability of aid to education. It is divided into two sections - one dealing with theory and one dealing with the prospects for maintaining or expanding levels of multilateral aid.

a. Education and development: some theoretical perspectives

There is polarisation around the question of whether or not foreign aid to basic education is desirable or useful. Weiler (1983, p.37) notes that "of all sectors of development co-operation, education is usually the most susceptible to charges of interventionism, dependence, cultural domination, etc.". Those who contend that aid to formal education has the potential for great damage write in an anthropological mode, describing the impact of alien knowledge and values on one's sense of self and one's culture (e.g. Clignet, 1971). Those who see great potential and promise for education as a key to development tend to describe the impact of aid on education in primarily economic terms, and to see the problems of implementation as primarily problems of technique which can be eliminated by adjusting the "input" of aid so that it more closely corresponds to the desired "output" of material progress. The latter point of view is characteristic

of most large aid agencies, including the World Bank.

Among the anthropological theorists, some, such as Memmi and Fanon probed the effects of transfers of Western education on the mind of the student, while others such as Rahema and Zachariah examined the assumptions and biases of those who make decisions on aid. Rahema identified a technical, managerial "top-down, ethnocentric, blueprint" (1984, p.5) approach to the problems of third world education, which manifested itself in large-scale, institution-based, bureaucratic interventions. Zachariah (1985) described two paradigms in the minds of Western aid planners - that of students as "lumps of clay", passive and undifferentiated objects to be molded by Western expertise; and that of students as "growing plants", to be nurtured and aided to express individual strengths and differences.

Other writers have treated education, particularly elite (secondary or tertiary) education as one particular manifestation of an overall relationship between first and third worlds. Such writers accept the concepts of cultural dependence, described by Altbach and Kelly (1978) as "an unfavourable balance of cultural payments ... (the third world) imports many more knowledge products than it exports" (p.302) and reproduction, described by Hurst (1981) as the theory that education reproduces existing patterns of cultural and economic inequity, reflecting the

stratifications of the society outside the educational institutions and ensuring that these stratifications persist throughout generations.

Education is seen as one of the forces which contribute to the creation of an international division of labour which assigns to the third world a role as producers and exporters of primary products and as a source of cheap labour. This division requires two things: the creation of an educated elite group to oversee the affairs of the third world country and to form a link with first world elites; and the legitimation of the dependent third world state. This international pattern is also reproduced within nations, as was documented by Bowles and Gintis.

Writers who accept this analysis criticise the assumption that aid to education is politically neutral and morally unimpeachable. They look for the hidden agenda which is identified with furthering the ends of neo-colonialism and capitalist expansion. However, Hurst (1981) cites several other critics of aid to education who are of the opinion that the organisational constraints and problems of aid are such that negative outcomes are effectively neutralised by the inefficiencies of aid mechanisms and processes.

b. The prospects for further aid to education

Recent studies of the role of aid in education in developing

countries have not been optimistic. Carnoy et al.'s 1982 study, The political economy of financing education in developing countries, concluded that a substantial "legitimacy gap" ("the difference between expenditures, current and proposed, and the level necessary to meet the demand for education" (p.39)) would continue to exist into the foreseeable future. This study stressed the difficulty of obtaining reliable and valid data about the contribution of education to society, and the related difficulty in assessing and planning education projects. Most of the other studies which Carnoy et al. cited found that the rate of return in the education sector was highest to basic education, but the authors of that paper identified several socio-political factors which would make it difficult for governments and aid agencies to spend more on basic education. Other studies, particularly those conducted by the World Bank, reached similar conclusions about the legitimacy gap, but recommended that this gap be made up by private contributions to the cost of schooling rather than by increased aid or government expenditures.

Hans Weiler's study of aid to education (1983) found that donor nations were unlikely to provide an adequate or even constant level of support of aid to education, due to "resource limitations ... and a number of political factors" (p.6). Such low levels of funding would make it impossible to achieve such objectives as "universal primary education, the

improvement of educational quality and a more equitable distribution of educational opportunity" (p.5). Countless World Bank studies since then have analysed and documented the need for more aid to social sectors and human resource development in general and aid for education in particular.

Even if finances were not a problem, the existence of a "world crisis in education" (Coombs, 1985, cited in McLean, 1986, p.201) is thought to threaten the ability of aid organisations to contribute to abolishing the third world's comparative disadvantage in education. This global crisis, which "threatens the existing and already inadequate provisions of educational opportunities" (p.201) is the result of decreased public spending on education, and the increasing value of capital intensive scientific knowledge which produces a growing gulf between the technologically literate and the majority of the world's population. Many studies documenting the global availability of social welfare corroborate the existence of a threat to third world educational systems in terms of declining quality of education and decreased equality of educational opportunity (Cornia, Jolly and Stewart, 1987). "Quality" was identified by World Bank officials during interviews in March 1990 as the major underresearched area in third world education (interviews with Marlaine Lockheed and James Socknat).

Indeed, even if the alleged global crisis did not exist and

if funding for aid programmes could be secured and increased, it is not certain that universal prosperity would follow the expansion of education. Writing in 1978, Hans Weiler called for a sense of "enlightened humility" (p.197) about the potential for positive social changes as a result of increased educational provision. This call by Weiler was motivated by the belief that faith in the constructive value of education had entered an "age of scepticism" after an "age of innocence" in which it was believed that education could accomplish anything. Weiler justified this scepticism by pointing to growing awareness of resource limitation, the intellectual dependence of the third world on the industrialised countries, and the essentially conservative characteristics of educational reform.

## 5. THEORETICAL FRAMEWORK

This study is not intended to validate or to expand on a particular methodology or theory. It operates with several assumptions about the nature of international aid and the importance of basic education. Insofar as these assumptions constitute a theoretical framework, they are as follows:

1) The "photocopy approach" to development, in which third world countries mimic the development choices of first world countries, does not work. Third World countries must find ways of resolving their educational issues which are born out of their experience rather than based entirely on the stages

of development experienced in the first world.

2) "Transfers can either be imposed or invited. What has been imposed can later be accepted voluntarily for a number of reasons" (Le, 1987, p.231). It is true that the imposition of Western models of education was in many ways detrimental to third world education. However, it is in the best interests of many countries to retain and expand certain aspects of imposed models.

3) Education is both a means and an end. The right to be educated is a basic human right and is in addition a way of achieving salient societal and individual goals, such as a more balanced economy or a higher standard of living.

4) The quality, distribution and potential for social and individual mobility through education is a good gauge of a nation's or an agency's commitment to the well-being of the people it serves.

5) Organisations, particularly large organisations with differentiated functions and with numerous interest groups acting on the policy formation and implementation process, are liable to internal contradiction. In international development, this means that an organisation such as the World Bank may act simultaneously to promote and to retard true development and that certain aspects of its work may be progressive and other regressive. In other words, differentiated organisations are not monoliths.

6) Changes in international relationships produce changes in education for several reasons: education's potential to

create and maintain international divisions of labour; changing patterns of wealth and poverty which affect finances available for the provision of formal education, and the dynamic of cultural domination and resistance to that domination.

## 6. RESEARCH QUESTIONS

1. What is basic education? Is it essential for promoting true development through improving the lives of the poor?
2. What evidence is there to suggest that the quality and distribution of basic educational opportunity is declining? How has economic crisis and adjustment affected basic education?
3. What have the World Bank policies and programmes in education been in the past, and how is the Bank responding to the threats to basic education?

# BASIC EDUCATION AND THE BASIC NEEDS APPROACH TO DEVELOPMENT

## 1. THE BASIC NEEDS APPROACH

In the 1970s, an approach to development and to education as a component of development arose which integrated the moral, economic and political aspects of education. This strategy was called the basic needs (BN) approach to development, and it is valuable to examine that approach to provide an ideal against which the present situation of education stands out in stark relief.

### a) Origins

The BN approach emerged from disillusionment with growth-based theories of development which predominated in the 1950s and 1960s. Rapid growth during these years benefitted mainly the richer half of the population of third world countries, particularly those living in smaller industrialising countries such as Sri Lanka, Taiwan,and Singapore. Other larger countries experienced great discrepancies between rich and poor as a result of poorly distributed growth (Streeten and Burki, 1978, p.411). Economic growth alone did not appear to be sufficient for the eradication of poverty.

Critics of economic plans based on growth maximisation split into two overlapping groups - those who believed that its emphasis on capital-intensive industry and export-led

development intensified third world countries' position of dependency with respect to the first world; and a second group who criticised growth maximisation on the grounds that the emphasis on building productive capacities further impoverished the marginally productive poor, since such people were likely to be ignored in strategies which concentrated on productive capacities alone (Stewart, 1985, p.8). Several development theories were formulated to avoid the destructive effects of growth maximisation, many of which received more political, organisational and financial support than the BN approach, although the BN approach had a more direct appeal to people in the first and third worlds. These other formulations included the International Labour Organisation's emphasis on full employment (Streeten and Burki, 1978, p.411) and the World Bank's notion of "redistribution with growth" which required mechanisms for distributive equity to be built into development plans. In both these formulations, however, emphasis was placed on raising incomes as a means to the end of raising standards of living. The basic needs approach was the first of the international development strategies to emphasise the abolition of poverty directly rather than indirectly through income augmentation. The basic needs approach was also helped by the timing of its appearance, during the 1970s when the industrialised countries were relatively affluent and many third world countries were winning their independence and embarking on plans to expand their social programmes.

Support for the basic needs approach was also motivated by less altruistic concerns. Robert MacNamara, the prime mover of the basic needs approach at the World Bank, learned from his experience in the Vietnam war that "a regime that ignores the most basic needs of its poorer majority will never be stable. This ... had been a chronic problem for the regimes the United States created in south Vietnam" (Broad, p.50). Consequently, MacNamara and his staff developed the notion of basic needs satisfaction as a form of "defensive modernisation", through which improvements in the standard of living would stave off the possibility that political elements bent on destabilisation could capitalise on popular dissatisfaction. When Ayres surveyed the staff of the Bank towards the end of MacNamara's mandate, he found this attitude widespread (Ayres, 1983). More cynically, the enthusiasm of MacNamara and others for the basic needs approach can be seen as an attempt to atone for centuries of aggressive and exploitative colonialism, culminating in the public relations disaster of Vietnam.

b) Concepts

The basic needs approach to development is superficially simple but operationally complex. According to Hopkins and van der Hoeven (1983, p.4), "a basic needs approach seeks to define development objectives in terms of people and what they need rather than turn to secondary objectives such as

growth, industrialisation, increased trade et cetera. These are essentially means to meet the needs of the people ... a priority of development objectives should be the satisfaction of the basic needs of the poorest people by the year 2000." Stewart (1985, p.1) emphasises that the basic needs approach concentrates on all people, without distinction based on productive capacity or ability. Streeten and Burki note that "while increasing productivity is not the criterion (for the basic needs approach), the basic needs approach often does have that effect and is therefore doubly blessed. Thus, the emphasis on the needs of children can be regarded either as a form of long-term investment or a focus on basic needs." (1978, p.412).

The actual constituents of basic needs are defined in many different ways, but the goals of this approach always include "the fulfillment of certain standards of nutrition (food and water) and the universal provision of health and education services" (Stewart, 1985, p.1). Hopkins and van der Hoeven (1983, pp.9-10) cite several different definitions of basic needs. Education appears as a component of all the definitions, and is in some cases the only component which has a non-material or abstract character, unlike components related to the satisfaction of immediate physical needs such as food or shelter. Of the World Bank's definition of the five basic needs (education, food, drinking water, health and shelter) (Hopkins and van der Hoeven, 1983, p.3) education is

the only one which is not primarily physical.

c) The political environment of BN satisfaction

Most writers stress that the goals of basic needs cannot be achieved except in a global environment which permits self-reliant development (Streeten and Burki, 1978, p.413). Therefore, efforts to satisfy human needs at the micro level must be complemented by, although not subordinated to, measures to secure autonomy and sustainability at the macro level. Stewart (1985, p.2) also emphasises the importance of global economic factors in the effort to procure resources for BN satisfaction; a point which is borne out by the experiences of countries in the late 1980s whose BN programmes are imperilled by poor terms of trade and global debt problems.

A second way in which political environment affects the success of BN projects is in the role of the public sector. Services which are important in reaching BN targets, such as public utilities, mass educational services and health systems, are often the responsibility of central or local governments rather than of the private sector. Even in those areas which are not traditionally controlled by the public sector, such as food retailing, the implementation of price controls or subsidies in order to make these supplies accessible to the poor implies a high degree of government involvement (Streeten and Burki, 1978, p.414). BN strategies

are thus most likely to succeed where the implementing agency is willing to accept an important role for government. Other political factors which have been found to positively affect the BN programmes include the number of years since independence and per capita GNP, while dependence on a single export is negatively correlated (Hopkins and van der Hoeven, 1983, p.3)

Finally, the BN approach is most suitable in societies whose main development challenge is a high degree of absolute, rather than relative, poverty. In such conditions, the primary task of development is relieving the immediate conditions of the people rather than promoting economic efficiency, modernising the economy, or even redistributing the wealth which already exists, since redistributing wealth might go some distance towards eliminating inequities but might not be sufficient to eradicate the conditions that produce poverty.

d) Problems in the basic needs approach

Certain problems arise both in conceptualising and in implementing the BN approach. These problems dog the efforts of development agencies such as the World Bank and can explain both the difficulties of developing and maintaining BN programmes and the difficulties that will be faced in any effort to re-orient development to the satisfaction of basic human needs in the current period of economic crisis.

In the planning phase of BN programmes, defining basic needs can be difficult because of cultural and philosophical differences, but setting targets to be achieved can be even more difficult because of the possibility that certain interest groups will influence or attempt to influence the setting of targets in order to subordinate BN goals to other economic policies and goals. Emphasis on popular determination of basic needs goals and targets can also lead to confusion between needs and wants, particularly under the influence of advertising or media. There may also be confusion between projects and plans which respond directly to basic needs (such as primary education) and projects which respond to the desire for social mobility, such as higher-level education.

Even if the problem of determining appropriate targets can be resolved, a second major problem arises. This is the difficulty of finding appropriate indicators by which to measure progress or lack thereof. Many of the measures which are frequently chosen, such as life expectancy or school pass rates, are problematic in that they often do not actually measure what they are intended to measure. Stewart (1985, p.55) points out that one may have a long life expectancy while suffering from chronic diseases or malnutrition; similarly, one may graduate from school and thus be included in a high pass rate without having learned anything relevant

to one's life. In other words, indicators often do not tell the extent to which the attainment of targets has really contributed to a higher quality of life. It is difficult to create a single universally accepted index of quality of life against which the success of poverty alleviation strategies can be measured. In addition, data collected in areas of absolute poverty tends to be based on guesses and estimates which can be biased by the vested interests of the reporting agencies. When data is not disaggregated for gender, class, ethnicity or region, the use of national averages can conceal maldistribution. Nonetheless, such data related to literacy and primary enrollment are the best measurements that exist of progress in basic education.

A third major problem, with repercussions not only for the BN approach but for the overall development strategy of the country, is the involvement of the "non-absolute-poor" - those who have the essentials to sustain their existences. To concentrate only on the poor and marginal is to risk the sustainabilty of BN programmes when they are not seen to have benefits for the "productive" classes. On the other hand, the BN approach is vulnerable to being diluted and co-opted if it strays too far from the absolute poor.

## 2. BASIC EDUCATION

In the literature of the basic needs approach, education is significant primarily because of its relationship to the

satisfaction of other basic needs. Education is generally considered a means rather than an end in itself; and education may be the only means, within the BN approach, to some certain non-material ends such as greater involvement in decision-making and self-determination.

a. Characteristics of basic education

The type of education incorporated into BN strategies is usually quite different from the educational models and systems which the third world inherited from their colonial past. Instead of emphasising a credentialling function or academic and abstract studies, basic education (BE) concentrates on three things (this typology was used by the Noor of the World Bank in 1981, and is present with minor variations in most discussions of BE): communications skills and general knowledge; life skills and life knowledge, including family planning, agriculture and general health and nutrition; and productive skills necessary to make a living (Noor, 1981, pp.9-10). BE has six organisational characteristics which allow it to be integrated into BN strategies: 1) it is based in human needs - health, nutrition, shelter, economic needs and social needs; 2) it is concerned with equity - the potential must exist for equal distribution of the rewards associated with BE; 3) it is linked to real employment opportunities, especially in agriculture; 4) it has a low cost per capita and per instructional unit; 5) it recognises the aspirations of

learners and incorporates programmes to respond to these aspirations; 6) it is of short duration and has frequent termination points. BE is considered an important part of BN programmes because it is a means to the goal of improving the quality of life. It has been demonstrated over and over that education contributes to the alleviation of poverty in both intangible ways which resonate across many sectors of development and in specific and quantifiable ways which affect single indicators.

Because of these characteristics, the most common means of attaining BE goals is through primary and adult nonformal education programmes. It is important, however, not to equate basic education exclusively with either primary or nonformal education for two reasons.

First, as the universalisation of primary education is unlikely to be achieved in the near future, other, less expensive means must be used to attain BE goals. In addition, systems of primary education tend to be standardised and centrally controlled, while Noor (1981) emphasises that "BE does not imply a set number of years in school, or even a set curriculum, as the character, amount and means of delivery of education must necessarily differ ... according to the target groups ... and their distinctive needs" (p.10).

Second, there is a more subtle danger in equating BE with

nonformal education. These programmes became popular when formal education programmes were found to be contributing to unemployment and cultural irrelevance, to the extent that the World Bank, in its 1974 Education sector working paper, found that formal education of the sort that had been supplied since the colonial times was becoming irrelevant to the real needs of developing countries. BE strategies, while emphasising primary and nonformal programmes because of their low unit cost and flexibility, must however be careful not to become counterproductive by excessive reliance on these types of programmes.

b. Effects of basic education

***i. Global effects of education***

Commentators across the political spectrum - from Paulo Freire to the colonial powers in Africa - have stressed the importance of learning and acquiring knowledge in creating modernity of outlook and political maturity. Literacy in particular is associated with the development of critical consciousness and self-reliant attitudes. One of the more tangible results of education's ability to promote global attitudinal changes is that awareness of and demand for goods and services can be stimulated, which can have unanticipated political effects, as the "revolution of rising expectations" can produce either peaceful social change or violent social unrest.

Many educational planners saw education as a way of developing "modern" westernised concepts of such things as task commitment and time perception. This is generally considered to be one of the results of non-curricular aspects of education: "Many of the non-recognitive aspects of learning - competition, discipline, self-confidence, self-esteem, receptivity to new ideas - directly influence economic production" (Noor, 1981, p.3). These effects, by their nature, are more closely associated with formal schooling than with nonformal programmes of basic education.

***ii. Specific effects of education***

Basic education has been found to be a major factor in an interlocking web of influences which make the various means of poverty alleviation interdependent. Education, for example, can positively influence individual income, nutrition and health, all of which in turn provide more access to and greater ability to absorb education. Some of the most researched and most significant correlations between education and other basic needs - economic activity, increased agricultural productivity, and beneficial effects associated with the education of women - will be described below.

***1. Economic activity*** Because basic education leads to higher skills, which can lead to greater economic activity, it can be described as a good investment in the economy. This

link has been expressed in terms of individual rates of return to investment in education (increased personal income) and social rates of return (increased contribution to GNP, expressed as pre-tax earnings since taxes represent transfers back to the government). The social rate of return has been found to be highest for low-skill levels of education such as primary education and adult literacy education, making them the most profitable education investment for third world governments. Rates of return hover near the 25% mark for primary education (Hicks, 1979, p.986; Jiminez, 1986, p.127; Psacharopoulos, 1985, cited in Tilak 1989, p.20). Tilak (1989, p.20) found that the relationship between education and economic development is strongest in countries described as "very poor". Rates of return to education are highest in low-income countries and compare favourably to the calculated rates of return for other government investments (World Bank, 1980b, p.49). While the individual may benefit more in terms of increased income if s/he is educated to secondary and tertiary levels, the greatest contribution to the national good is made by government investment in lower levels of education.

Tilak (1989) summarised the huge amount of research into the economic consequences of education and arrived at several general conclusions, two of which are particularly significant for basic education. Tilak found that "both with respect to growth and income distribution, the contribution

of primary education is more significant than that of higher levels of education" and "contribution (rates of return) is higher from investment in education of socioeconomic weaker sectors (of the population) compared to investment in their respective counterparts" (p.60). These findings, taken together, reaffirm the centrality of basic education in a basic needs model of development which emphasises the simplest and most primary levels of skills and which is directed to the poor.

***2. Agricultural productivity*** The effect of basic education on agricultural productivity is generally positive; and is particularly fortuitous because of the stress within the BN approach on helping the poorest of the poor, the majority of whom live in rural areas. Much of the positive effect of primary education on agriculture can be attributed to the ways in which basic learning enables farmers to absorb other inputs with a more direct impact on their productivity. For example, numeracy may be a necessity for obtaining credit, with which labour-saving implements can be purchased. Similarly, literacy may be a pre-requisite for joining a co-op or for absorbing information about new growing techniques.

Lockheed et al.(1980, cited in Tilak, 1989, p.24) found that four years of primary schooling for farmers could enhance farm output by an average of 8.7%. Tilak's survey of literature found that the positive impact of basic education

on agricultural productivity was highest in areas characterised by low technology and poor environmental conditions, i.e. in the poorest parts of the world. This makes basic education even more significant in the basic needs approach which is oriented to the poor areas of the world rather than to those with good environmental conditions and sophisticated technological inputs.

***3. Basic education and women*** The benefits accruing to society from investment in basic education for women do not often appear on formal calculations of increased income and productivity because most women tend to work outside the monetarised economy. In Africa, for example, 80% of agricultural production is done by women and the vast majority of this is for consumption within the family unit rather than for exchange (Hilsun, 1985, p.11).

Although investments in women's education may have the same economic impact as investment in men's when measured in increased wages, women's education has greater impacts on child and family health (Schultz, 1988, cited in World Bank 1988b, p.4). Because of women's role within the family, they are the most important conduit for information about BN satisfaction to reach the rest of the family and it is therefore important that they be literate. Women are largely responsible for household practices which have a positive association with BN satisfaction, such as boiling drinking

water, so education which has a component focusing on home economics (as do most basic education programmes which adheres to the first characteristic mentioned by Noor), brings benefits to the whole family. The mother's primary education has been found to be more significant than the of the father in building the ability of the family to absorb new practices related to the satisfaction of human needs.

In addition to satisfying the needs of the family, literacy and primary education also enable women to satisfy other needs, mostly through providing access to income-generating activities. These can be especially important when women are family heads, as in the case in many of the poorest regions where men must leave the home because of unemployment and migratory labour patterns. Literate women are more eligible to work in the formal or organised sector of the economy, although they may face debilitating competition with educationally overqualified men as well as cultural prejudice. Women's small-scale entrepreneurship, which is becoming an increasingly important sector of troubled or debt-ridden economies, is helped by literacy and numeracy, which permit women to avoid being cheated, to form co-operative associations and to compete successfully with larger or better-established enterprises. This is also socially beneficial in that it reduces women's economic dependency on men. Literacy and basic numeracy among women are crucial to the success of the small credit and loan

programmes for agriculture mentioned above, as women have a better payback record than men (Press, 1988, p.3).

Basic education of women has a major impact on fertility and population growth. Increases in the provision of educational opportunity frequently depress the birth rate, because primary education increases a child's chances of success in life and parents need no longer have many children to increase the odds that at least one will be able to provide for parents in their old age. In addition, women with some education are more likely to delay marriage (particularly if education proceeds beyond the primary level) and to learn about and be able to use contraceptive and birth spacing methods. Since mothers' education has a positive effect on children's health, mothers do not need to have many children to ensure that a few survive. The education of women has a strong transgenerational effect as new cohorts of children grow up in environments where the benefits of literacy and numeracy are constantly apparent. (Hyde (1989) notes that this effect is particularly pronounced in the case of female children). This effect would logically be strongest if the primary caregiver (usually the mother) is educated.

Efforts to promote the basic education of women are often stymied by social customs and functions assigned to women, such as betrothal, early marriage, pregnancy and childbirth, which interfere with education. In places where customs

preclude women's employment in the formal sector, the perceived benefits from education are also smaller. These factors often proceed from strongly held traditions, handed down over hundreds of generations. This aspect of women's integration into development is thus deeply involved in questions of cultural imperialism and of the apparent contradiction between securing human rights (such as the right to education) and respecting cultural practices. These theoretical problems are interesting and merit more attnetion than they have received. On the practical level, however, there are several options for improving women's involvement in school, beyond simply increasing the number of places available and expecting that girls will move into them. These options include increasing the number and visibility of female teachers; the introduction of labour-saving measures for women and girls to free them to go to school; the provision of segregated classes for girls where culturally appropriate; and the integration of science and technical subjects into girls'curricula.

## BASIC EDUCATION PAST AND PRESENT

Basic education should be situated in two contexts - first, the historical context of colonial and post-colonial education which create certain factors that impede the realisation of BE goals; second, the current economic context of education, particularly in terms of the global crisis of debt, recession and adjustment which has profound impacts on the status of basic education at the national level, at school level and at the level of the individual. In describing the current status of basic education during this crisis, I will use data relating to primary enrolment and adult literacy attainment, as the closest categorical approximations of basic education, as suggested by Frances Stewart (1987).

### 1. HISTORICAL CONTEXT OF EDUCATION SYSTEMS

#### a) Colonial education

Developing countries have found themselves caught between the restrictions imposed by their colonial past and the demands of modernisation. This is compounded when poverty prevents qualitative and quantitative changes in the inherited institutions.

Colonies which were dominated by the European powers played the roles of political outposts, sources of raw material and

cheap labour, and more recently dumping grounds for surpluses. The education structures were designed to produce people who would fit into these functions and generally resulted in polarisation between the managerial elite and the vast lower and working classes. Formal education, especially that given to the elite, was instrumental in holding up the social structure because education plays a large role in the development of self-image, skills, attitude and world view, all of which could be tailored to fit the interests of the colonial powers. Colonial administrators tended to downplay the provision of social services, so that the provision of education was scanty and erratic except among the elite.

Not all colonial education was destructive. Colonial administrators pioneered the concepts of education for women, vocational or technical education and were often responsible for the transliteration of the vernacular. It should also be noted that criticisms of inadequate provision, elitism, irrelevance and racism could be levelled at the domestic policies of the colonial powers, most of which did not have free and universal primary education until this century.

b. The colonial inheritance

Colonial educational systems had several characteristics in common. They were meritocratic and elitist and became associated with the transition out of traditionalism and into modernity. The school thus became legitimated (Carnoy, 1974:

Weiler, 1983) as a civilising, liberating and mobilising force, a perception which legitimates both the school and the social system which it represents.

The colonial period also produced a set of institutions, processes and values which can be collectively thought of as the colonial inheritance:

- a highly academic curriculum, often offered in a European language (Thompson, 1976)
- a job hierarchy, especially within the government, based on the number of years of school attended and the number of academic credentials obtained ( Zachariah, 1985)
-a curriculum based on the historical experiences of the colonising powers (Thompson, 1976)
- the orientation of the intellectual elite towards the academic discourse of the metropolitan centres (Altbach, 1971)
- a curriculum which stresses academic skills to the detriment of non-academic skills
- an educational "ladder", in which each stage feeds to the stage above and no stage except the final one is terminal (Thompson, 1976)
-institutes of higher education which replicate those in western countries, notably the transplantation of American land-grant universities to Latin America (Altbach, 1971).
-alienation on the part of graduates from both their own culture and the metropolitan culture (Clignet, 1971)
-heavy reliance on European-style formal examinations and thus on rote learning (Thompson, 1968)
-favouritism shown to urban or "modern" sector over rural sectors and regions

The period between the 1940s and the 1970s marked many transitions to independence, some of which were peaceful, while others came about in the context of revolution. Some new nations chose to attempt ambitious programmes of social and economic engineering to eliminate the relative poverty of their countries, while others were content to leave colonial structures intact and replace a foreign elite with an

indigenous one.

Most newly independent states found themselves with several major imperatives for education. The quality of the workforce had to be upgraded so that the country would not always be economically dependent on the metropole. The attitudes of the people had to be reformed so that the new state would be able to generate its own ideology and politics and would not always be intellectually dependent on the metropole. Finally, many newly independent countries, particularly those with socialist orientations such as China and Cuba, expressed the idea that education is a human right as well as an instrument for achieving national objectives, and should therefore be extended to as much of the population as possible. This attitude, whether deriving from liberalism, socialism, African socialism or Christianity, necessitates a quantitative as well as a qualitative change in education.

This was the era of the "education explosion". During the years 1950-1985, enrolments in all levels of education expanded from 250 million to 906 million, while the number of adult literates increased from 1,134 million in 1960 to 2,314 million in 1985 (Tilak, 1989, p.1). According to Unesco (1988, p.6), the primary enrolment ratio in the developing countries increased from 72.8% to 97.8% between 1960 and 1985.

Regardless of the path chosen for the newly independent country, the academic, meritocratic nature of inherited formal education proved to be remarkably resilient, even in the face of deliberate interventions designed to make education more indigenously-based and more progressive. Aklilu Habte of the World Bank, looking back from 1983, reflected that "certain types of educational investment (i.e., formal schooling) are able to withstand the vicissitudes of social and economic change" (p.69). Habte attributes this to the enduring individual demand for education as a means of social mobility which persists even when this demand conflicts with the needs of society as a whole for different types or levels of education. Others, such as Martin Carnoy, borrowed from American educationists such as Bowles and Gintis and argued that the endurance of this inherited model of education was because formal education was inherently class-reproductive - that it reflects and perpetuates the hierarchical nature of society, and that until this hierarchy is eliminated, education can not be fundamentally reformed.

## 2. CURRENT STATE OF THIRD WORLD BASIC EDUCATION

Indicators of basic education registered steady progress through the 1970s and early 1980s, a legacy of large-scale interventions by governments and nongovernmental organisations as well as the result of relatively prosperous decades. Frances Stewart of the Unicef group which produced Adjustment with a human face suggests literacy levels and

primary school completion and dropout rates are appropriate indicators for monitoring the basic educational welfare of the poor (Stewart, 1987, p.261). Since data on completion and dropout rates for primary levels is relatively hard to come by except on a country by country basis, I have used first level enrolment ratio figures supplied in Unesco's latest statistical yearbook instead, although these figures can be distorted, as described below. Indicators of literacy and primary enrolment describe the current status of basic educational welfare - in order to trace the causes of this status and thus to understand the achievement of basic educational goals in a wider economic context, Stewart recommends monitoring real incomes of low income groups and government expenditure. In the case of basic education, which tends to be provided directly through public funds, I have chosen to examine government expenditure on social services, particularly on education, instead of family income.

This type of analysis necessarily neglects important qualitative indicators of the state of third world education. Determining what constitutes the quality of education and then determining how to measure it produces methodological problems which are beyond the scope of this study. However, it suffices to say that deteriorating quality of basic and primary education has been identified as a major global problem, particularly acute in sub-Saharan Africa (World

Bank, 1989a). A related problem is shifting patterns of expenditure by operational category, resulting in lower expenditures on non-salary recurrent expenditures such as textbooks, despite the evidence that the impact of such inputs is very high in developing countries (Verspoor, 1990, p.12). Declining quality of education, coupled with decreasing quantity, places in double jeopardy the social externalities generated by education which are the heart of the basic needs model.

Most planners now agree that universal primary education and universal literacy, represent ideals rather than realistic goals. The current challenge is to maintain current levels of attainment and resource commitment before expansion in the direction of the ideal can be undertaken. These levels of attainment and resource commitment will be described below.

a) First-level enrolment

The picture that emerges from figures reflecting first-level enrolment is not so much of an absolute decrease in enrolees as of a reduction of the rate of increase. This is apparent in all regions of the world, particularly in sub-Saharan Africa, where from 1970 to 1980, the female gross enrolment ratio grew from 36% to 68%; while between 1980 and 1990 it is projected to grow to only 69% (Unesco, 1988, p.101). The male first level enrolment ratio is actually declining (from 89% to 84% between 1980 and 1985; with a rise to 86% projected

for 1985-1990). In sub-Saharan Africa, the average annual growth rate of first level enrolments from 1980-1986, 2.4%, is only slightly more than one quarter of the average annual growth rate from 1970-1980, 8.4% (Unesco 1988, p.213). The modest increases in the total number of children enroled translates into stagnation or decline when put into the context of rapid population growth.

The reduction in enrolment in the late 1980s is especially noticeable when it is compared to the years between 1960 and 1970 when LDC primary school enrolment increased at about 10.5% per year. (Primary education, however did not expand as fast as secondary and tertiary enrolment, which grew at 32.2% and 25.5% respectively (Bacchus, 1981, p.216)). According to Unesco, no region in the world achieved a growth rate in first level enrolments in the 1980s which was higher than that achieved in the 1970s.

Children may be deprived of primary education not only because population growth has outstripped the number of places available, but also because schools may be geographically or socially inacccessible, because students are too ill or weak to attend school, or because their parents cannot afford the fees or the foregone income that the children could earn. Consequently, the number of out-of-school children is caused not only by population growth but also by declines in health and family income. The number of

out-of-school children is projected to increase from 49 million in 1970 to 79 million in the year 2000 (Unesco, 1988, p.97). The number of out-of-school children aged 6-11 is projected to increase from 25 million in 1970 to 37 million in the year 2000. The number of out-of-school 12-17 year olds is expected to increase from 24 million to 42 million in the same time period, a rate greater than that which could be explained by the average annual population increase in that time. The younger children are likely to be kept out of school because of health-related problems, while their older siblings are more likely to be involved in income-producing or subsistence activities. Both age groups are affected by deterioration or elimination of schools.

The use of first level enrolment figures may actually give an unduly positive picture of the actual enrolment situation, since these figure do not disaggregate repeaters and students who drop out or attend only sporadically. Unesco estimates that 25% of children enroled in the first level of schooling will drop out without ever becoming literate, yet these children will be represented in figures describing enrolment numbers and patterns and that 15-20% of all school places are occupied by repeaters, which distorts the enrolment pattern. The number of children dropping out and repeating grades can be expected to increase as children's health declines, which has been occurring over the past five years as gains in nutritional standards and child mortality are slowly being

reversed.

b. Literacy

Figures on literacy attainment give less cause for pessimism than figures on primary school enrolment. Illiteracy rates among adults (15 years and over) have declined steadily in every region of the world; and the decrease in the rate of decline in the 1980s is not as precipitous as the decrease in the growth rate of first level enrolment. This may be so because literacy attainment figures tend to reflect past interventions to a greater degree than figures for first level enrolment. Once a person becomes literate, s/he is likely to remain so, if not for the rest of his/her life, at least for several years to come. The success of primary schooling and literacy campaigns in the 1960s and 1970s means that the 15-24 age group in the third world has a higher literacy rate than the population as a whole (Unesco, 1988). Children enroled in first level education, however, are only counted for the few years that they are enroled in school. Another cause for relatively high literacy figures is the low costs associated with literacy programmes, which tend to be less expensive to start and to maintain. In addition, literacy figures include those who successfully maintained the literacy they gained in school as well as those who were affected by specific programmes aimed at illiterate adults.

The total number of illiterates rose from 760 million in 1970

to 890 million in 1985. China and India together account for more than half of the world's illiterates (UNESCO, 1988, p.98). Women's literacy still lags behind that of men, with women's literacy rates being less than three-quarters of that of men for the third world as a whole, the worst instances being in South Asia, where women's literacy is only half that of men (INSTRAW, 1987, p.2).

For a variety of reasons, literacy appears to be more clearly linked to per capita income and employment opportunities than does primary school enrolment. In order for literacy to be maintained, it must constantly be used, and the numbers of jobs requiring high literacy skills shrinks in difficult economic times. As a result, one might expect to see a delayed decrease in the rate of reduction of illiteracy, resulting from unemployment, underemployment and cuts to literacy maintenance programmes which do not have the same political appeal as, for example, the provision of primary schooling. The growing absolute number of illiterates as well as socio-economic factors which contribute to the erasure of literacy mean that illiteracy will continue to be a problem. This will continue to frustrate the attempts of third world countries to move out of a subordinate place in the world economy, as advances in technology demand higher and higher literacy skills.

c. Resources for education

The outlook for public education in terms of financial resources available to sustain it is not promising, giving some credibility to the scenario of a "world crisis" in education. The reductions in expenditures on education described above take place in a context of overall reduced government expenditure. The social sectors including health and education were actually affected relatively lightly by cutbacks and economic crisis - only defense suffered fewer reductions.

In the period from 1980-1984, two thirds of all third world countries registered negative or negligible GNP growth per capita (Cornia, Jolly and Stewart, 1987, p.1), and real government expenditure per capita fell in over half of these countries. (Pinstrup-Andersen, Jaramillo and Stewart, 1987, p.73). Expenditure on social services, including health and education fell 13% (World Bank, 1988c, pp.110-113). In the least developed countries (LLDCs), public expenditure on education as a percentage of GNP rose only marginally from 2.9% in 1980 to 3% in 1985.

The majority of this expenditure (from 70% to 90% according to Hurst, (1981, p.119)), is spent on recurring costs, especially teacher's salaries. This characteristic of education may actually have lessened the impact of cutbacks on the education sector, considering that a study of government cutbacks during the global recession of the early

1980s (Hicks and Kubisch, 1984) found that governments tended to reduce capital expenditures more than recurrent expenditures as the political costs of reducing recurrent expenditures such as wages were too great. This mitigates the effects of austerity on educational financing, a sector which is heavily biased towards recurrent expenditures. However, Verspoor (1990, p.12) notes that the share of education budgets allocated to non-salary recurrent expenditure, such as textbooks, is declining. The amount spent per pupil on teaching materials (which are strongly correlated with pupil success in the third world) declined from $2.60 per pupil per year in 1975 to $.67 per pupil per year in 1985 in the low-income countries (p.20).

In some countries, particularly sub-Saharan Africa and the highly indebted Latin American countries, stagnant and declining GNPs combined with soaring populations have actually reduced the amount spent on education per capita in real dollars. "Between 1972 and 1985, education's share in central government budgets in all developing countries fell from 13% to 10% ... In sub-Saharan Africa, real expenditure for each pupil in primary education declined in 17 out of the 25 lowest income countries ... the enormous gap in per capita spending on human resources between industrial and developing countries has been widening rather than closing" (World Bank, 1988c, p.13). Primary education, central to the realisation of BE goals, appears to have been slightly better off than

secondary education - despite the increasing number of primary students, expenditure per primary pupil in Africa in 1983 was 72% of what it has been in 1970, compared to 62% for secondary students (Tilak, 1989, table 5).

The reductions on expenditures for education are especially striking in comparison with the expansions of the 1970s. In sub-Saharan Africa, spending on education declined from nearly $11 billion in 1980 to $6 billion in 1986, compared to an increase from $3.5 billion in 1970. This discrepancy probably owes as much to abnormally high rates of growth in the 1970s as to abnormal slowdowns of growth in the 1980s. In the 1960s and 1970s, education was "oversold" by development planners, who encouraged resources to be poured into education in the hope of reaping economic benefits which did not materialise. (This should not, however, minimise the remarkable achievements in literacy and primary enrolment, which are valuable even if their value cannot entirely be captured in rate of return calculations).

Although much educational expenditure has been skewed disproportionately towards the higher and more elite levels of education, basic education can be particularly vulnerable to financial cutbacks because it has fewer non-governmental funding sources such as fees. Even the World Bank, a strong proponent of user costs as a means of financing education, concluded in its report on education in sub-Saharan Africa

that it would be impossible to expect private sources to make up anticipated shortfalls in financing for primary education. In addition, the target population for basic education is likely to continue growing as the demographic bias towards youth increases, further burdening first level institutions, while the target population for elite education (i.e., the middle and upper classes) is likely to remain stable or even to shrink under economic recession.

It is worth noting that financial capability is not the only or even the dominant factor influencing the provision of financial resources for education. Political will or commitment can have a strong effect on educational expenditure and consequently on educational attainment. Anyadike (1989, pp.1040-1041) notes that Nigeria, one of the wealthiest countries in Africa, has an illiteracy rate of 62% while relatively impoverished countries such as Zambia and Lesotho have illiteracy rates of 24% and 26% respectively. As another indicator of the power of government commitment in even the most difficult times, the annual growth rate of educational expenditures fell by 17% from 1987 to 1988 in Ghana and Nigeria, but by only 7% in Angola, which was in the middle of a civil war at the time.

# BASIC EDUCATION DURING ECONOMIC CRISIS

## 1. ECONOMIC RECESSION, ADJUSTMENT AND EDUCATION

The changes in expenditure on education described in the preceding chapter are largely the result of recession and adjustment. Adjustment has always been a feature of economic life (Streeten, 1987): some adjustments are positive - for example, increased prices for a major trade good or lower interest rates. In this case, the challenge for the government is to derive the maximum sustainable benefit for the greatest number of people from this good fortune. More often, however, the adjustment for many third world countries has been to worsening economic circumstances, in which case it is the responsibility of the government and those who advise the government to permit the least possible harm to come to the greatest number of people. The policies and practices involved in helping governments adjust can be judged by the extent to which they protect the interests of the most vulnerable.

This has been done throughout the 1980s. At the beginning of that decade, reports issued by the OECD and the World Bank and commissioned by the White House envisioned a future in

which the quality of life would be sacrificed to economic pressures. The World Bank's 1980 Development report (p.86, cited in Helleiner, 1987, p.1509) warned of the "serious danger that economic stringency in the next few years will lead to cutbacks in human development programmes, despite their contribution - often exceeding that of additional physical investment - to Africa's future". This report concluded that the Bank and other institutions should pay attention to the protection of human resources; advice which, says the Bank's Adriaan Verspoor, "the international community, including the Bank, has not heeded, (Verspoor, 1990, p.xvi). In the late 1980s, Cornia raises the same concerns, this time on behalf of the entire third world, about "the aggregate tendency of prevailing adjustment programmes to have poverty inducing effects ... especially for vulnerable groups and especially ... during the time necessary ... for policies to start yielding results ... (F)or many countries the need to adjust seems to be a continuous one in the 1980s as external conditions remain highly unfavourable" (1987, p.67).

Since the early 1980s, third world countries have been faced with adverse conditions which force them to change their economic and social programmes. Streeten (1987) indicates the following: 1) growing debt service coupled with high interest rates; 2) deteriorating terms of trade resulting from increases in import prices and drops in commodity prices; 3)

high inflation; 4) slower growth in the industrialised countries; 5) technical changes which affect industries, such as miniaturisation and electronics.

These trends are complicated by:
6) population growth; 7) urbanisation; 8) scarcity of land and raw materials; 9) protectionist policies in the industrialised countries; 10) scarcity of food grains; 11) environmental pollution; 12) international migration; 13) natural disasters; 14) artificial disasters such as war (p.1472)

The causes of these problems are located both within and without the third world. Therefore, neither solutions which are localised entirely within third world nations themselves nor solutions which are exclusively international will be adequate. However, as the Commonwealth Secretariat notes (1987, pp.3-4), the mechanisms for reducing economic crises, particularly those promoted by the financial institutions such as the International Monetary Fund and the General Agreement on Trade and Tariffs, are essentially asymmetrical, in that they put pressure on the countries with balance of payments deficits to adjust but put no equivalent pressure on countries with balance of payments surpluses.

Third world governments faced with extremely negative balances of payments have essentially three choices

(Commonwealth Secretariat, 1987, p.4) - to finance the deficit by borrowing; to restrict international trading; or to adjust the domestic economy to the changed international situation. The first two options are neither wise nor feasible; so the only alternative is to undertake policy reforms. This process affects the vast majority of the poorest and most indebted countries in the late 1980s, and for sub-Saharan countries and Latin America, "adjustment policy is the dominating economic pre-occupation for setting frame and constraints within which all other economic and development issues have to be considered" (Introduction to Cornia, Jolly and Stewart, 1987, p.5).

a. Analysing the impact of adjustment and recession

For a variety of reasons, it is difficult to distinguish clearly between the effects of adjustment and the effects of recession. Cornia (1987, p.68) states that "it is not possible, methodologically speaking, to attribute precise causal responsibility for the deterioration in human conditions". This is true for several reasons:

***i. Lack of a "control group" of countries***

Countries which implement major adjustment programmes are countries which are already suffering from economic problems which inevitably harm the ability of the poor to meet their basic needs - it is impossible to create a "control group" of countries to determine whether the impact on basic needs

satisfaction would have been better or worse had adjustment not been pursued.

***ii. Role of inputs other than government spending***

In education, successful attainment of goals is the result of numerous inputs, only some of which are directly linked to government spending. The standard of living of the poor, including such things as adequate income and adequate nutritional intake, is crucial to the realisation of BE goals. In some cases, it is possible to blame the adjustment process for negative impacts on the standard of living of the poor (for example, when price controls are removed from food staples). In many other cases the distinction between the impact of adjustment measures and that of recession is not so clear (for example, when unemployment rises). I have borne in mind that the negative impacts on education described in this chapter are characteristic of countries going through the adjustment process and are not in all cases the result of the adjustment process itself.

***iii. Variations among adjusting countries***

It is also difficult to make generalisations about the effect of adjustment on BN satisfaction because of the great variations among adjusting countries. In countries where the poor have never benefitted substantially from public social services, the decline in their standard of living may be smaller than in those countries where social services played

a bigger role in the lives of the people. It is also difficult to predict (as distinct from describe) the impact of adjustment because "the poor" are usually a diverse and heterogeneous group. While the elderly, the disabled and single women are almost always poor, other impoverished groups, depending on the country, may include the "educated unemployed", urban young men, landless peasants, members of certain ethnic and religious groups, etc. Since economic policy measures affect different sub-groups in different ways, and since the size of each sub-group varies from country to country, it is difficult to predict the impact of recession and adjustment without a detailed country by country study.

***iv. Assessment using exclusively economic measures***

Assessing the impact of adjustment measures in economic terms, such as GNP per capita, average income per capita or income distribution by percentile is frequently done by the International Monetary Fund (IMF) and the World Bank. While these indicators are useful for describing a country's economic recovery or non-recovery, they are not so useful for describing the satisfaction of the basic needs of the poor. In countries where many people are involved in non-monetarised activities, impoverishment cannot be gauged by statistics related to income alone, which is a weakness in much reporting done by the IMF and to a lesser extent the World Bank. Relying on average income or income distribution

can also be misleading because such measures disguise the dislocation caused by various groups shifting position along the wealth-poverty continuum. While the size distribution of "the poor" may appear to be relatively unchanged, the composition of the poor is subject to alteration (Helleiner, 1987, p.1502).

b. What is adjustment?

Adjustment programmes may be undertaken voluntarily, but are more often undertaken as a pre- or or-requisite for being granted a loan by a commercial bank or a multilateral organisation such as the IMF. Some countries, such as Tanzania and Jamaica, have been reluctant to undertake the types of adjustment programmes mandated by the IMF because of a concern that these programmes place too much burden on the poor with too little positive result (Helleiner, 1987, p.1499). Worsening social and economic conditions in Africa, where 28 countries have adopted the IMF's orthodox austerity measures yet continue to be unable to repay their loans, let alone progress towards development, have called into question whether the traditional adjustment strategies of export and private sector promotion and expenditure reduction are worth the chaos they create (Westlake, 1988, pp.23-25).

Until recently, most adjustment programmes were aimed at large-scale, macro-economic changes in the allocation of resources and expenditures. The most important trend in these

macro-economic programmes in terms of impact on basic education and other social services is increasing the role of and the resources allotted to the private sector by reducing the role of the state and re-allocating resources to market-oriented sectors and enterprises.

In order to achieve adjustment objectives, three types of policies are employed: expenditure reduction, which curtails demand through such means as lower wages, more restricted credit and reductions in the public sector in order to both cut the deficit and reduce domestic consumption of goods which could otherwise be exported or traded; expenditure switching, which diverts both labour and capital to sectors which are considered more productive; and institutional and policy reforms, including privatisation and reduction of the role of the state in the economy (Cornia, 1987, p.51). All of these types of policies have impacts on the quality and provision of social services including basic education. Some impacts are on the ability of the people to utilise social services; other impacts are on the ability of the government to provide such services.

Impacts on the family, which affect the people's ability to derive maximum benefit from social services include: 1) changes in income through changes in wages and level of employment and through changes in product price affecting the self-employed; 2) changes in the price of imported (or

subsidised) items such as food; 3) changes in level and composition of public expenditure in the social sector, including possible introduction of or increases in charges for services; 4) changes in working conditions, through changes in work hours, job security, fringe benefits and legal status (Commonwealth Secretariat, 1987, p.10)

The third of the effects mentioned above relates directly to the availability of educational opportunity while the others relate to health (which in turn has an impact on absenteeism and intellectual ability) and the opportunity costs of schooling, which increase as the need for potential students to engage in income generating or reproductive work grows. The opportunity costs of schooling also increase if the heads of the household are unable to provide for the family because of deflated wages and/or inflated prices, and so require the assistance of other members of the family.

Recognising these potentially deleterious effects of traditional adjustment programmes upon the ability of people to maintain an adequate standard of living and satisfy their basic needs, Unicef has called for "adjustment with a human face", the Overseas Development Institute in London wants "adjustment with equity", the Canadian International Development Agency has committed itself to adjustment programmes with "miminal impact on the poor", and the World Bank is now emphasising sectoral adjustment programmes which

strengthen the development of human capital and human resources. Even the new managing director of the IMF, Michel Camdessus, is said to be more aware of the social impact of the conditions associated with IMF loans, although this may be more an attempt to improve the Fund's image in the face of widespread disenchantment with the human cost of adjustment programmes than an altruistic policy shift (Sparks, 1988).

c. Adjustment lending and the World Bank

For the third world as a whole, there were an average of 47 such countries with adjustment programmes every year between 1980 and 1985, an increase over the average of 10-15 during the 1970s. (Westlake, 1989, p.24). The World Bank is an example of an institution becoming more and more preoccupied with adjustment. Changing global circumstances have forced the Bank to make loans for adjustment, despite the 1944 Articles of Agreement which stipulate that aid was to be only for the purpose of specific projects. Lending to assist with adjustment, however, usually encompasses work designed to change national priorities and policies. By following this trend, the Bank has become more significant as an influential body which can shape policy as well as a bank in the traditional sense.

The World Bank makes structural adjustment loans and sectoral adjustment loans. The former are oriented to economy-wide changes while the latter are focussed on specific sectors

which are intended to make the country more able to cope with its economic difficulties by increasing the ability of sectors to be either more efficient or more productive. Education was the first social sector to receive such a loan.

Adjustment lending represents 23.3% of the Bank's total lending (p.5), while sectoral adjustment represents 19.5%. The majority of countries receiving adjustment loans are in Africa (39% of all adjustment loans in 1987) or the heavily indebted Latin American countries (29.9% of all adjustment loans for 1987). For most of these countries, adjustment loans represent more than half their total loans from the Bank.

***i) Impacts of adjustment lending on poverty***

As adjustment lending becomes a more and more important part of World Bank lending, the question of the human impact of adjustment must be addressed. A concern for human welfare in the making of loans to assist with the adjustment process has been relatively rare. Most organisations making loans for adjustment have traditionally insisted that they are purely financial institutions and are not concerned with the impacts of their loans and programmes on the development of a country. The International Monetary Fund in particular insists that it is not within its mandate to say what third world governments should do internally to improve income distribution and to fight poverty:

A question that may be raised in this connection is whether the Fund should exert pressure in the determination of government priorities and even make the granting of its assistance contingent on measures that would better protect the most disadvantaged population groups. An international institution such as the Fund cannot take upon itself the role of dictating social and political objectives to sovereign governments". (Jacques de Larosiere; "Does the Fund impose austerity?"; cited in George, 1987, p.53).

This is true, according to a very literal interpretation of the IMF's articles of agreement which stipulate that the purpose of the Fund is to stimulate world trade, but the Fund's ability to influence domestic policies has been demonstrated again and again by their practice of selectively making loans and imposing conditions upon countries in which the major partners in the Fund have a particular interest. In the area of the social impact of adjustment lending, the Bank has been emerging in advance of the IMF in the past several years, with programmes which take more account of human needs than do the programmes of the IMF.

The IMF's 1986 comprehensive analysis of its adjustment programmes, Morris Goldstein's The global effect of Fund-supported adjustment programs, made no mention of changes in the quality of life of the poor as potential criteria for judging the success of an adjustment programme, while the World Bank's publication of Adjustment lending: an evaluation of ten years of experience by Stanley Fischer dealt directly with the impact of adjustment programmes on the poor. Fischer's report found that adjustment programmes have

positive results overall, and contribute to the resumption of growth in the third world, but added a few caveats: "The sustainability of adjustment programmes and hence the restoration ... of programs in poverty alleviation may be threatened by rising debt burden ratios, difficulties in maintaining fiscal balance, and deficiencies in per capita consumption levels" (World Bank news, February 23 1989 p.3) This observation is borne out by the decline in social spending noted in chapter 3. Fischer concluded that there was still much room for improvement in the Bank's lending for adjustment, and recommended, as a pragmatic first step, that more money be made available for programmes targeted directly at alleviating the social costs of adjustment. Fischer's proposals may be an indications of a swing back to the Bank's past, and to the early 1970s debates about the importance of capital assistance to promote redistribution of income versus the development of human resources.

Marilyn Zuckerman addressed the issue of the social impact of adjustment more specifically in the Bank's first publication on the topic, Adjustment programs and social welfare, which was published in 1989, five years after the first UNICEF study on "adjustment with a human face". Zuckerman found little data on the social cost of adjustment, but what she did find indicated that, despite the overall positive effect of adjustment on the economy, it "made some of the poor poorer" (World Bank news, March 2 1989, p.2). Zuckerman

identified three groups which were especially vulnerable to declining standards of living - the "new poor": people, usually in the public sector, who lost their jobs as a direct result of restraint; the "borderline poor" whose marginal existence had been made possible by such things as food subsidies and social services, and who are consequently pushed over the brink into poverty when these services are reduced or eliminated; and the extreme poor, who were destitute even before the adjustment process began. While in the long run, Zuckerman agreed with the Bank's standard wisdom that economic growth and liberalisation of trade is the only way to alleviate poverty, in the short run she argued that more capital resources are necessary to preserve social services, as well as better management of those that already exist.

Zuckerman suggests several ways in which the adjustment process can be changed so as to preserve the ability of the poor to satisfy their basic needs. These ways include, in the short term, cost recovery, selective privatisation of social services, reform of the administration and planning of social services and tax reform (Zuckerman, 1989, p.16). In the long term, Zuckerman argues that the poor must be brought into the process of economic growth and expansion, through programmes designed to enhance human capital building and employability. (Characteristic of the Bank, Zuckerman does not mention any factors in the global economic environment, such as

plummeting commodities prices or high interest rates as contributors to impoverishment during adjustment).

All of Zuckerman's suggestions have obvious implications for the World Bank's lending for basic education, with the exception of taxation reform. Her recommendations are amplified in the Bank's publications on educational policies, and are expressed to a certain extent in the Bank's pattern of lending for education in the 1980s. These recommendations take up certain themes which have remained constant in the Bank's lending for education throughout the years, and form a tentative outline for the ways in which the Bank will deal with the specific problems of education during times of economic adjustment.

d. Adjustment and basic education

The impact of adjustment and recession on education is not limited to the education sector itself. Because so many aspects of BN satisfaction are interdependent, as illustrated in chapter 2, other aspects of the life of the poor affect both the quality and provision of education, and the ability of the poor to attain basic educational standards. Examples include widespread unemployment, which acts as a disincentive for literacy programmes, or increased food prices which lead to greater malnutrition, which in turn affects cognitive capacities and school success. It is difficult to "prove' the connection between changes in employment and nutritional

status and possible impacts in education, just as it is difficult to prove that deterioration in the standard of living are the result of adjustment programmes rather than of the economic difficulties these programmes were designed to address. However, it is possible to conjecture that impacts on a a variety of aspects of the life of the poor would necessarily affect basic education.

Government spending cuts themselves do not affect basic education as strongly as they do other sectors for two reasons: first, because the education sector as a whole is relatively well-protected from the brunt of cutbacks and second, because national governments and development agencies are making choices which favour forms of basic education. The World Bank provides examples of the second reason in action, which will be discussed in the next chapter; the first illustrated is borne out by studies of the distribution of government cutbacks in recessionary times.

### *i. Distribution of government cutbacks*

Social expenditures in the 1970s and early 1980s were less vulnerable than other types of expenditures when governments made cuts in their budgets to cope with recession. Streeten (1987, p.1476) suggests that this may be because the increased unemployment and falling incomes associated with other aspects of adjustment programmes create a greater need for social services; Kubisch and Hicks (1984, p.38) suggest

more pragmatically that the social sector (and the defense sector) are not as vulnerable to cuts because of high political costs in the form of middle class alienation and because both those sectors involve a great amount of recurrent expenditures which usually involve employment. Education in particular may be protected from cuts because the education system is traditionally biased in favour of urban groups, whose approval is crucial for the continued existence of a particular government.

Per Pinstrup-Andersen, Maurice Jaramillo and France Stewart's studies of the impact of adjustment programmes on government expenditures in the mid-1980s confirmed these findings. They found that "cuts in government expenditure tended to fall most on economic services and least on defence, with health and education occupying an intermediate position" (1987, p.77). Of these two major social sectors, education appeared to be slightly more vulnerable than health to expenditure cuts, although there is less data available on the impact of adjustment on education. Pinstrup-Andersen, Jaramillo and Stewart found significant regional variations, noting that African countries tended to protect the education sector from cuts while the major Latin American debtor countries tended to expose it more. Although education was relatively well-protected from the worst impact of government restraint, the authors cite anecdotal evidence to illustrate that even the milder forms of austerity to which education was subjected

could be have severe effects - in Zaire, 7000 teachers were removed from the government payroll in 1984, while in Ethiopia even children in the wealthy urban schools must now share one textbook among at least four students (p.73).

***ii. Indirect effects of recession on education***

Other effects of recession may have less direct but no less significant impacts on education. These indirect effects have not all been documented and proven, but may be inferred. They include: ***1. The relatively more severe impact of recession and adjustment on women compared to men***. As described in chapter 2, women, particularly women with some degree of basic education, are crucial to the satisfaction of the basic needs of the family. Because most adjustment programmes emphasise increasing the role of the private sector and the free market, which has many financial, physical and cultural barriers to women, the incomes and job opportunities open to women have probably deteriorated (Commonwealth Secretariat, 1987, p.10), (although programmes aimed at women entrepreneurs and credit plans for women are a hopeful sign). The switching of labour into cash production or export production means less time for women to engage in "reproductive" work, such as childrearing. Children are left in the care of siblings or are expected to be autonomous, which can have a negative impact on their physical health. Cornia (1987, p.100) notes that in times of austerity the intra-household distribution of resources changes, so that

the available resources of food clothing or surplus money, including money for school fees, tend to go to the men and the boys. Girls may also be expected to take on more of the reproductive tasks of the household. This impoverishment of women can ripple across the generations, since women's education and standard of living are one of the greatest influences on the quality of life of their children.

***2. The impact of recession and adjustment on nutrition.*** Declining standards of nutrition and increases in intellectual handicaps have been noted among children in countries where food subsidies have been cut (George, 1987:, Cornia, 1987). This can be expected to negatively affect the attainment of minimum standards and to increase the wastage at the first levels, as well as increasing the number of dropouts. Malnutrition is most common among the younger primary school aged children, since, as the intra-household distribution of resources changes, older and stronger siblings claim a greater share of what little food there is.

***3. Greater international and intra-national migration.*** When life in rural areas becomes untenable, due to low prices for agricultural goods, the abandonment of state agricultural collectives or for other reasons, rural-urban migration takes place (although in some regions, such as Brazil, this flow is reversing as the employment situation in the city becomes worse than that of the countryside). This phenomenon is

exacerbated by refugee flows out of unstable areas and by migration resulting from environmental problems such as drought. Although it is usually initially single men or male heads of households who migrate to find work, families are also forced to migrate as conditions worsen. Although little research has been done on this result of recession, this degree of mobility could play havoc with basic schooling for children, disrupting the continuity of children's education and making it impossible to plan adequately for facilities and staff. When a family moves from the region of one cultural or religious group to that of another, ethnic, racial, linguistic or religious tension can also be disruptive. Cornia (1987b, p.119) notes that increases in the number of street children and vagrants have been reported in the wake of economic austerity measures in the Philippines. Not only does this indicate that a large number of newly arrived urban children are not in school, but it may also make the cities unsafe places for children who must travel to get to school, as crime among young people rises.

Another form of disruptive migration which is peculiar to children takes place when family incomes fall and children are "farmed out" through the extended family network or as labour to more affluent families (Cornia, 1987a, p.101). This could have positive effects of children's attainment of basic educational goals because more affluent families would have greater access to educational services.

or it could have negative effects due to lack of continuity and exploitation of the newly adopted children.

***4) The effects of recession and adjustment on the opportunity costs and benefits of schooling***. In times of economic adversity, the opportunity costs of attending school are likely to rise and the benefits are likely to decrease. Households may switch to more labour-intensive forms of basic subsistence production as a response to unemployment and increasing poverty (Cornia, 1987a, p.95). This may mean that family members cannot be released to go to school. Girls may be especially hard hit, as child care duties are relegated to them in order to free the mother to supplement the family income. Incidental expenditures associated with school, such as uniforms and supplies, may be beyond the reach of the family.

At the same time, the benefits associated with the attainment of basic skills may also decrease. The civil service, traditionally the desired occupational goal of graduates, becomes less attractive as expenditure reduction programmes force governments to freeze wages or hiring. Outside the public sector, the job market may become increasingly chaotic and unpredictable as a result of expenditure switching plans. Because skilled labour is not as "switchable" as capital or physical resources, unemployment occurs in sectors which are not deemed sufficiently

productive. This contraction and disjointment of the job market acts as disincentive for the poor to pursue education (Caillods, 1989, p.129).

Despite all the recession linked pressures on education which are felt at the household level, individual commitments to basic education remain strong, more testimony to the remarkable resilience of formal education noted by Habte in chapter 1. According to a study by Raczynski cited by Cornia (1987a, p.94) when economic pressures hit households, the last expenditures to be cut or reduced are staple foods and children's school fees. Eisemon and Schwille (1989) report that families in impoverished areas of Burundi are committed to paying their children's school fees in any way possible, even at the expense of investing in purchases with greater economic returns, such as seeds and fertiliser.

iii. Pressures at the school level

Other indirect pressures of recession and adjustment on education are felt at the school level, as opposed to the household level. Government restriction on foreign exchange and reductions in imports can mean that vital educational supplies such as textbooks and lab equipment cannot be brought from abroad or cannot be serviced. This can be a particular hardship in those countries which have not previously taken steps to make their curriculum indigenously based and has spurred some countries such as Zimbabwe to

accelerate their efforts to "Africanize" education, especially at the lower levels. Wage freezes in the public sector can have a negative impact on teachers, who make up a large part of the civil service. If highly qualified, they may abandon their profession and look elsewhere for work; if not so well qualified, they may have to moonlight and take on additional jobs. Morale problems and unrest among teachers can be traced to falling incomes, as was the case in Sri Lanka (Cornia, 1987c, p.122). Government reductions in expenditures may also affect education in the long term by eroding the educational research capacities of third world institutions. Consequently, the development of appropriate and indigenous pedagogy and curriculum is delayed, and dependence on the metropole in this regard is continued.

Clearly, the effects of economic recession on basic education are complicated by the adjustment programmes undertaken. The effects on education are often actually worsened by adjustment programmes which are oriented to austerity and rationalisation above all else. Agencies which work in the field of education, such as the World Bank, should make education a priority, in view of both the importance of basic education as a basic human need and the difficulty which basic education programmes will have in meeting the needs of the poor during economic crisis. For some of these institutions, this will require changes in the traditional ways that they have supported education and modifications to

their philosophies and policies on education.

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# THE WORLD BANK AND BASIC EDUCATION

## 1. THE WORLD BANK

### a) What is the World Bank?

The World Bank (formally known as the International Bank for Reconstruction and Development) was created by the Bretton Woods conference of July 1944. It was originally concerned with the reconstruction of Europe, but made its first loan to the third world to Chile in 1948 (Ayres, 1983, p.4). Its first loan for education was not until 1963 (World Bank, 1971, p.13). Unlike its sister institution the International Monetary Fund, whose business is to assist countries with their balance-of-payments problems, the World Bank provides financing for specific projects designed to promote development. The growing importance of adjustment as a development issue means that the World Bank has begun encroaching on territory which was once exclusively that of the International Monetary Fund.

The Bank fulfills many functions. First and foremost, it is a source of funds for development projects. Secondarily, it is a political forum within which different ideologies and geopolitical blocs, as well as different conceptions of development are played out against on another. The politicised nature of World Bank decision making can be seen

by the composition of its Board of Directors, where voting strength is determined by a country's contribution to the Bank's finances. The United States alone commands approximately 20% of the total vote, while 23 African countries command only 2% of the vote. The president of the Bank is traditionally an American; current president Barber Conable is a former US congressperson. The Board of Directors of the World Bank is dominated by the Western industrialised countries, which tend to direct the greater percentage of their aid through bilateral channels, and a higher than average percentage of their multilateral aid through the World Bank group.

An indication of the Bank's dependence on Western governments was seen in 1980 when the first Reagan administration reneged on its commitment to IDA, as part of an across-the-board reduction in support for multilateral organisations, including the United Nations, which were found to be not sufficiently positive towards the United States. As a result of this and of matching withdrawals by American allies, the value of the loans that IDA was able to disburse fell by 39% from 1980 to 1982.

By granting or withholding funds, the Bank and the IMF can "vet" a county in terms of its suitability for assistance from commercial banks. "The credit rating and flow from international commercial banks are favourable to those

countries which are endorsed positively by the multilateral institutions, particularly the IMF and the World Bank' (Reddy, 1985, p.6). Reddy also notes that the Bank in a 1984 meeting expressed strong support for a multilateral investment guarantee agency, which it would have headed. Because the World Bank is a bank, its development work is conditioned by the need to attract and placate the investors who buy its securities, to keep itself solvent, and to ensure the creditworthiness of its borrowers (Ayres, 1983, p.10).

Thirdly, owing to the Bank's size and research capacity, it is also important as an intellectual forum which provides governments and organisations with the data and analysis they need to formulate and implement policies. Although the Bank was once heavily dependent on the United Nations for research and data, particularly in the field of human resource development, it is now able to produce an impressive number of scholarly publications and working papers.

The International Development Association (IDA) is an affiliate of the World Bank created in 1960 to provide loans on the most lenient possible terms for the poorest countries. IDA is less like a traditional bank and is financed entirely by contributions from members, rather than by funds raised on capital markets. IDA has become increasingly important in the maintenance of human resources development for IDA loans in the education sector as a percentage of total World Bank

education loans) and in loans for structural adjustment, particularly in Africa, the region in which many countries display both high indebtedness and poverty. Within these areas, IDA loans are designed to "bring the scope of (the public sector's) activities into balance with its capabilities" and to promote the private sector (World Bank news April 1989, "The evolving role of IDA", p.4), in keeping with the tendency toward restraint of the public sector as an adjustment mechanism discussed in chapter 4.

b) The World Bank today

The value of the World Bank's commitments has been growing steadily, to a record $21.37 billion in new commitments in 1989, according to the preliminary summary of the 1989 annual report. The proportion directed to the poorest of the poor, through the International Development Association, has remained relatively stable at approximately one fifth of the total committed, although IDA approved nearly as many new operations as did the IBRD, the "main" wing of the Bank, (106, compared to 119). The majority of Bank loans in 1988 went to Asia, the region of the third world in which is seen the highest growth rates. In 1989, slightly more new funds were allocated to Latin America and the Caribbean, the region with the most heavily indebted countries and thus an appropriate target for a Bank devoting more and more attention to adjustment (World Bank news, July 5, 1989).

c) Economic growth and the planning of Bank loans

The World Bank has historically equated development with economic growth and integration into the modern world capitalist economy; and has structured its loans accordingly. Since the 1960s, concern with the distribution of social goods (implying a greater role for basic education) has moderated the emphasis on growth, although some writers fear that following the departure of Robert MacNamara from the World Bank, this concern has abated.

The philosophies which guide the Bank's identification of projects have evolved since the creation of the Bank. In the 1950s and early 1960s, the Bank emphasised "megaprojects" such as highways and hydro-electric dams, designed to create an industrial infrastructure on the model of the western industrialised nations as quickly as possible. The emphasis shifted from such large capital intensive projects to more directly productive enterprises in sectors such as agriculture and small industry in the 1960s.

By the time of the "development decades" of the 1970s, the development of human resources and human welfare was given more attention as a means of building a base for economic development. During this optimistic time, the basic needs approach was created. Education became a priority and unrealistically high expectations were attached to its ability to transform a society. The Bank's 1980 Development

report is worth quoting at length to illustrate the changes in the World Bank's perspective on basic education:

> A decade or two ago, there was a widespread view that trained people were the key to development. Universal literacy was a political objective in many countries, but money spent on primary education was often regarded as diverted from activities that would have contributed more to economic growth. Planners favoured the kinds of secondary and higher education that directly met the manpower requirements of the modern era. People who worked with their hands were not thought to have much need of formal education. Over the past decade, views have changed dramatically. But the value of general education at the primary level is now more and more widely recognised" (World Bank, 1980b, p.436)

In the 1980s, sustaining the progress that has been made and assisting with the process of adjustment have become priorities. At the end of the decade, however, the Bank has not strayed far from its roots.

In 1988, Barber Conable, the president of the World Bank, stated that "first and foremost we must have growth. Growth provides the poor with access to better markets and opportunities. It provides the resources for private and public programs vital to the poor. It helps sustain the broad-based political support the anti-poverty effort needs" (World Bank, 1988b, p.3). Conable's identification of the pillars of this drive for growth - combatting hunger, curbing excessive population growth, investing in education and protecting the poor during the process of economic adjustment - shows the influence of changing notions of development and is distinct from the earlier days of the bank, when

growth was thought to be secured through megaprojects for industrialisation and infrastructure, projects which provided substantial benefits for western corporations and governments. The justification for giving priority to human needs projects is still framed in terms of potential benefit to economic growth and stated in the metaphors of human capital: "The productivity of an educated workforce is the most reliable engine of growth ... Modest investment in education, wisely and steadily made, will pay great dividends in fostering growth and reducing poverty" (World Bank, 1988b, p.4).

e) Policy-based lending

Another new dimension to Bank lending in the late 1980s and early 1990s is a concentration on policy-based lending. The Bank has historically been involved with project lending - the provision of funds for specific development projects. Recently, however, the Bank has been placing more emphasis on work in the area of policy formation. An emphasis on strengthening policy implies an emphasis on institution building in order to sustain improvements in policy and programmes. This "sustainability imperative" (Gow and Morss, 1988, p.1403) means that the focus is on "institutional learning and capacity building, rather than on the attainment of temporary targets".

The shift to policy based lending will have ramifications for the education sector, due to the Bank's strong research

capacities in that sector, and may be one contributing factor in the Bank's preference for qualitative over quantitative improvements in basic education. In the area of education, policy lending is connected with adjustment programmes - Verspoor (1990, p.13) notes that "programs to reduce the public deficit have, in many cases, disproportionately affected education, not only curtailing growth but hurting the operation of the system". Although the Bank has not issued a sector paper on education since 1980, its major research-based publications, especially Education in sub-Saharan Africa and Education for development: new financing options give indications of the policy directions the Bank will expect national governments to undertake with its loans.

f) New directions for the Bank

Fiscal 1989 is the "beginning of a new era" at the Bank in which "the strategic priorities ... set for the institution truly began to be embodied" (World Bank news, July 1989 p.2), according to the preliminary synopsis of the 1989 development report. These priorities are identified as "investment areas that are targeted at the very poor and make a direct difference in their lives" (p.3) as opposed to strictly growth-oriented investments. According to Moeen Qureshi, Senior Vice President Operations of the Bank, fiscal year 1989 "initiates a major expansion in programmes that will directly invest in human capital - in education, health, nutrition and in more concerted efforts to address issues of

population planning and the role of women in development programmes" (p.2). It remains to be seen just how this reported new era will ease the economic stagnation and increasing poverty of some parts of the third world.

The Bank's lending choices of the 1980s provide both the backdrop and the launching pad for this new direction; analysis of the Bank's lending choices in the area of education in the 1980s reveals that the Bank still has some distance to go to give education its proper place at the lead of the Bank's new commitment to "people focused" development, particularly in terms of the quantity of financing available.

## 2. HISTORY OF WORLD BANK LENDING FOR EDUCATION

The World Bank has been making loans for education for 26 years. The Bank is the largest single provider of loans for education, providing approximately 15% of world official development assistance (ODA) for education (Verspoor, 1990, p.v).The priorities of the Bank's operations have changed over time in response to changing conditions in the third world; some themes, however, have remained constant and continue to be stressed in the current era of economic pressures.

### a) Education lending in the 1960s

Bank lending for education began in 1963. In that year, the President of the Bank issued a memorandum which defined the

scope of World Bank lending for education for the rest of that decade. The memorandum stated that "the Bank and IDA should consider financing part of the capital requirements of priority education projects designed to produce or to serve as a necessary step in producing trained manpower of the kinds and in the numbers needed to forward economic development in the member country concerned ... in the fields of a) vocational and technical education and training at various levels; b) general secondary education (cited in World Bank, 1971, p.13). Physical infrastructure was a major priority (Verspoor, 1990, p.v). This was in keeping with the then popular idea that the function of human resource development was to enable Western capital and technology to be more adequately absorbed.

Between 1963 and 1971, secondary education received 72% of the Bank's education loans and tertiary education received 23%. Primary education, crucial to the successful attainment of basic education goals, received only slightly more than 1% of the total volume of loans, while "adult training", which would take in adult nonformal programmes that contributed to the development of literacy, received 4%. The great majority of loans were for the capital costs of providing buildings and equipment (World Bank, 1971, p.16).

Loans tended to be very small by today's standards, even taking into consideration the effects of inflation. The

average value of an education loan in the 1960s was $7.6 million and the largest was $20 million, in contrast to the 1980s when loan sizes from the hundreds of thousands to the hundreds of millions are commonplace. From 1963 to 1971, the Bank made 57 loans to 42 countries, worth a total of $431 million (a lower volume that was often made in one year in the late 1980s). From 1963 to 1967, 90% of loans were to IDA-eligible countries - that is, countries with a per capita income of less than $200. In 1967, however, a decision was made to concentrate on a wider range of countries, and the extension of educational financing to wealthier countries led to greater emphasis on linkage with the modernised labour market.

In the 1960s, the Bank did not have the research capacity which it enjoys today. The majority of the research utilised by Bank planners originated with Unesco, indicating that education was not an intellectual preoccupation of the Bank. In the 1971 paper, several areas of concern for the upcoming years were identified: a) nonformal education and training; b) educational radio and television; c) programmed learning; d) the creation of appropriate locally produced teaching materials and equipment; e) training in business administration and management; and f) the management of education (World Bank, 1971) Some of these objectives, such as (b) and (c) are no longer evident as concerns of the Bank. Objective (f), identified in 1971 as "perhaps the most

pervasive weakness of the education system" (p.22) is still one of the most important purpose for which loans are made, and will probably continue to be so, particularly as education comes to be viewed more and more as a sector which needs to be adjusted.

b) Educational lending in the early 1970s

The sector working paper which followed in 1974 reflected the trend towards emphasis on satisfying basic needs which affected the Bank in the 1970s, although the paper stressed that "mass education will be an economic as well as a social necessity" (World Bank, 1974, p.14). This trend, according to the authors of the working paper, was fuelled by the greater demand for education generated by the great educational expansion of the 1960s as well as by the realisation that the satisfaction of the educational needs of the poor was not an automatic corollary of growth.

In the 1974 working paper, an emphasis on basic education was proposed as a policy alternative to both the increasing number of illiterates and primary school noncompleters, and to elitism and inappropriateness in the formal school system. It was conceived of as a number of "basic learning needs", including "literacy, numeracy, knowledge and skills for productive activity, family planning and health, child care, nutrition, sanitation and knowledge required for civic participation" (World Bank, 1974, p.30). The target groups

for programmes delivering this type of education were not exclusively school-age children, but could also include older children and adults. In order to give more emphasis to education as a basic need, the paper recommended, for the years 1974-1978, an allocation of $1,075 million for 80 educational projects and an increase of up to 27% of total educational lending for basic and primary education with a corresponding decrease for secondary education and beyond (World Bank, 1974, p.8).

The Bank's "new and dramatic" (p.47) concern with the situation of the poorest meant that educational policy became more differentiated. For the poorest countries, the development of low-cost programmes of basic education was to be pursued, while for the higher income countries the development of skills tied to manpower requirement projections at the secondary and tertiary levels would be the priority. These two tracks of the Bank's lending programme were expected to diverge more and more in the late 1970s.

The major issues envisioned for the remainder of the 1970s were equity, efficiency, and the development of the capacity for management and planning. The Bank called for the use of disaggregated analysis of regions, economic sector and social classes which would enable the government or the planning agency to target its efforts on the poorest, a type of analysis is even more urgently needed today.

The financing of education was not presented as a primary problem. Instead, it was seen as an area where greater efficiency would be desirable or as an arena for potential future problems. The notion of user costs was advanced as a possible means for both cost recovery and for control of the demand for education, although it was noted that the impact of these measures on the educational system, particularly on equality of opportunity had not been thoroughly researched.

In keeping with its stated commitment to raising the standard of living of the poor, the Bank's projected lending for 1974-1978 involved an increase for basic and primary education to 27% of total educational spending, up from an average of 11% in the years since 1971. Spending on agricultural education increased to 24% from an average of 17% in the years 1971-1974; and health education increased to 10% of the total. Corresponding declines in percentage allotment were absorbed by the fields of general and comprehensive education. While these percentages did not conform to the Bank's view of the importance of basic education relative to secondary and higher education, it was noted that the 1974-1978 period was to be a time of "tooling up" for a "substantially greater attack on worldwide educational needs after 1978" ( World Bank, 1974, p.54). This tooling up was to have paved the way for a major and ongoing expansion of the Bank's basic education programme in the 1980s.

c) 1980 sector policy paper

The Bank's next official pronouncement on its strategies in education was issued in 1980. Looking back over its history of involvement in education, the Bank was generally satisfied with the results of its work, especially in terms of meeting BE objectives. "Most educational institutions financed as part of World Bank/IDA projects have achieved or exceeded their enrolment targets; rate of repetition and dropout have tended to decrease; and female enrolment has increased. The few completed studies that included socio-economic surveys have shown an improvement in educational equity." (Haptemariam, 1983, p.22). The Bank reaffirmed its commitment to the "two tracks" of low cost basic education for the poorest countries and skills development for those with higher incomes; and to the development of management capacity, particularly in the middle income countries.

In this report, however, the concept of basic education underwent some changes. Basic education was presented less as a human right or need and more as "the minimum foundation in which countries should build higher levels of a comprehensive network of education and training" (p.24). Consequently, "assistance by the Bank to provide opportunities for basic education to the school age population will be devoted mainly to expanding and improving the quality of the formal system (p.24) with no mention of nonformal programmes, except

insofar as nonformal education can be encapsulated in "innovative projects and programmes intended to improve the quality and efficiency of basic education and increase access to it to groups which are not equitably served" (p.24) another stated priority of the Bank. The report's authors also state that "the recent concern of the Bank for expanding basic education does not imply any diminution in its interest in developing manpower to meet critical needs" (Habte, 1983, p.25).

The major concern in this paper is the improvement of the internal efficiency of the school system. Improving internal efficiency means improving the quality of such things as curriculum, textbooks and teachers, and re-evaluating the efficiency of continued injections of capital as opposed to such efficiency measures as class rotation and staggered schedules. This concern for educational management is apparent in the lending patterns of the late 1980s.

Psacharopoulos, in his commentary on the 1980 paper, notes several important changes which foreshadow the Bank's spending choices in the 1980s. First, the concern with the internal efficiency of school systems may be the result of a more sophisticated capacity to analyse education, joined with the need to rationalise expenditures brought on by periods of economic crisis and resulting in the emphasis on loans for management and planning prevalent in the 1980s

(Psacharopoulos, 1981, p.142). Second, the 1980 paper explicitly endorses the controversial principle of private funding and increased user costs in education, themes which are taken up in later Bank reports and recommendations. The utility of this recommendation during times of adjustment is obvious; however the potential social and political consequences of imposing such measures were of concern to the authors of the 1980 report.

## 3. WORLD BANK LENDING FOR EDUCATION IN THE 1980S

Since 1963, the Bank has lent $8 billion for education and training, about 4.4% of total Bank lending (Verspoor, 1990, p.24). The Bank has not issued a policy paper for the late 1980s, which would take into account changes in the world economy, including deepening recession, debt burden and adjustment which forces the public sector expenditure on education to decrease and which has increased the need for more aggressive measures to protect the satisfaction of the basic needs of the poor. In the absence of such a paper, I will refer to two studies published in the late 1980s and to the Bank's record in lending for education projects to obtain an idea of the Bank's major concerns entering the 1990s. This forms the backdrop for the major changes at the Bank heralded by Qureshi and indicates the steps the Bank is beginning to take to pursue its objective of "people-centred development".

One significant study is Education in sub-Saharan Africa,

published in 1988, which deals with the problems of basic education in difficult economic times in the area of the world where they are most pressing. This study takes up themes advanced in the 1985 Bank publication Financing education in developing countries, co-written by George Psacharopoulos, the pioneer of the rate of return calculations which convinced the Bank to adopt human capital theory to guide its educational planning in the 1960s and 1970s.

a) Financing education in developing countries

This authors of this report found that educational expenditures were being skewed away from the areas that has the greatest social return and into those areas that were most coveted by individuals for reasons of both personal economic gain and social prestige, particularly tertiary education. This amounted to an unfair transfer of public funds to the rich. Charging higher fees and offering loans instead of bursaries would cut down on the burden to the public, according to the authors of this report, and would not result in underutilisation of educational resources because of the great excess demand for higher education which already exists.

The authors believed that the potential gains in equity which could be made by diverting public funds to primary and basic levels of schooling would outweigh the potential loss of

equity resulting from more restrictive access to secondary and higher education. (This appears to be a new World Bank "two track" policy developing - this time with respect to the split between primary/basic and post-primary education, rather than with respect to the split between the poorest countries and the less poor countries.) This equity tradeoff, however, would be desirable only if it could be possible to guarantee that all the savings in higher education will be directed to primary and basic education - something which may be difficult to achieve, both because the target groups for primary and basic education are rarely politically powerful and because governments which are pressured to reduce spending may be reluctant to reduce in one area and increase in another. In order to see how these policy trends translate into practice, I will examine a recent report on education in a region where it is most strongly threatened.

b) Education in sub-Saharan Africa

This report describes the potential application of many of the general points raised in Financing education in developing countries, and contains several implications for policy at the Bank:

1. That African countries could not generate the funds needed for their educational systems and that more international money was needed, as well as better allocations of existing funds.

2. That greater cost-sharing and privatisation were valid

options for some forms of education but not for primary or basic education.

3. That education in Africa has deteriorated so far that the revitalisation of education must be achieved before any expansion of education can be contemplated - in other words, that qualitative improvements in education must take precedence over quantitative growth.

4. That the above recommendations can only be implemented if educational management capacity is significantly strengthened; and that therefore management should be a priority for aid to Africa.

The authors of the report indicate that the need to plan for continuous growth has been superceded by the need to restructure to prevent the further decline of African education systems, a "new experience" (World Bank, 1988a, p.98) which will require more emphasis on management and policy analysis. Restructuring will require the Bank and other international agencies to become more deeply involved in African education in order to halt the erosion of education, as well as regenerate it: "All savings from adjustment measures will not be sufficient, in most countries, to cover the substantial resources needed to revitalise and rebuild African education to the extent essential for future development. International aid will remain a critical determinant of progress in the region (p.102).

Three broad rehabilitative phases are proposed: adjustment of education, followed by revitalisation and finally expansion. The adjustment of education is achieved by the containment or reduction of unit costs and especially by diversifying the financial base of the educational system. This means, in practice, greater tolerance of private education and more efforts to shift the burden of costs where possible to students and their families. This plan would have relatively little effect on basic education, because it is assumed that "the scope for further cost sharing in primary education is negligible or nonexistent" (p.96).

International institutions such as the Bank must take the lead in changing the pattern of their aid-giving to fit the need for basic and primary education. The report's authors note that in recent years "only 7% of international aid to African education has been used for primary education, compared with 16% for general secondary education, 33% for vocational and technical education and 34% for higher education" (p.103). As well as adjusting their loans in terms of levels of the education system supported, international agencies must curtail certain investment choices which had previously been strongly advocated, but which are unlikely to raise the quality of schools, such as reductions in class size, highly educated teachers and the use of high-tech innovations such as televisions and computers (p.104).

Concurrent with adjustment are revitalisation measures to improve the quality of the educational system. The writers of the paper note that "the choice between expansion and quality is no longer an either-or choice. Without some basic revitalising inputs, particularly textbooks and instructional materials, almost no learning can be expected to take place" (p.99). The deterioration of the quality of primary education means that many social welfare benefits or "externalities" such as decreased fertility or increased political participation may no longer be expected to take place. Attention to quality before quantitative expansion can be undertaken is therefore justified by the need to raise the social rate of return of education and make it as profitable an investment as possible. This recommendation builds on a large body of Bank research (summarised in Fuller, 1986) which found that favouring improvements in school quality over school expansion (when such a choice must be made) yielded results in terms of increased individual incomes and higher social rates of return.

The "revitalisation" of education has three components - the strengthening of the formal examination system (the existence of which had been previously regarded as a weakness of African education); an increase in inputs, particularly textbooks and instructional materials; and improvements in physical plant (p.97). Expansion of the educational system,

which could be contemplated only after adjustment and revitalisation, might include distance education, a new drive towards universal primary education, emphasis on training and the building of greater capacity in research and post-graduate education.

Verspoor (1990, p.30) notes that Africa is the focus of education sector adjustment policies, having received three education sector adjustment loans in 1987 "and several more are under consideration". There are some indications of the beginnings of an economic recovery in Africa (interview with James Socknat, February 1990). If that is the case, education for the primary cohort now could pay off in about ten years, when this cohort is ready to enter an expanding job market which could absorb literate, numerate primary school graduates. Such a possibility justifies prioritising investment in basic education of the next generation over the current group of young adolescents and adults; however such a scenario ignores the human rights aspect of education as well as the social externalities generated by basic education.

Critics of the report found both positive and negative aspects to it. According to Marlaine Lockheed (interview February 1990) third world ministries of education have reacted negatively to the Bank's emphasis on primary education even at the expense of higher education. They perceive that change of emphasis could be another factor

widening the technological gap between the first and third worlds. Caillods sees the World Bank's approach to education in poor and debt-burdened countries as indicative of a new approach to human needs in times of recession which rejects the laissez-faire, free market approach of the IMF: "It (the report) constitutes a genuine attempt by the World Bank to "adjust" the adjustment policies advocated by the IMF" (Caillods, 1989, p.126). On the other hand, Eshiwani (1989) believes that the World Bank has not gone far enough either in rejecting the prescriptions of the IMF or in analysing properly the exogenous causes of recession which threatens African education. Taking these two comments into consideration, this report shows the Bank in transition - moving towards a goal of prioritising human needs while still remaining relatively uncritical of the international status quo of which it is a product.

c) World Bank initiatives for basic education in the 1990s. One initiative which is likely to shape Bank lending for basic education is a proposed "World Conference on Education for All: Meeting Basic Learning Needs" to be held in Bangkok from March 5 to 9, 1990. The World Bank, with co-sponsors the United Nations Development Program, Unicef and Unesco, plans to use the conference to fix definite educational goals regarding a) a common basic level of primary educational achievement in each country; b) access to basic knowledge and skills training for adults; and c) mass reductions in the

rate of illiteracy, with country-specific targets (World Bank news, February 9, 1989 p.3).

It remains to be seen what the effects of this conference will be on the Bank's educational work. It could be very significant for several reasons: first, it will be the first opportunity to evaluate comprehensively the Bank's literacy and basic education programmes; second, it will mark the first time that specific country targets will be set against which progress can be measured. It may also be the first opportunity for the Bank, in conjunction with other organisations, to develop global plans and policies for meeting basic educational needs in a world growing poorer. According to Marlaine Lockheed (interview, February 1990), the conference represents an opportunity for consensus building on the issue of basic education. She hopes to see the institution of spending targets for basic education set by the Bank at this conference, which will guide the Bank to increase its expenditures on basic education.

Other superficially unrelated changes at the Bank also bode well for the adoption of education policies and targets which favour basic education. For the first time since 1980, the Bank's annual World Development report will focus on poverty in 1989. In the same year, the Bank released its first compendium of statistics on worldwide social conditions, which outstrips Unesco's compilations in comprehensiveness

and specificity. In the area of lending, as distinct from policy and research, the IDA received a replenishment from donor nations equal to a record $US 17 billion, an 11% increase over last year.

The World Bank has also committed itself to increase funding for one very specific application of basic education: basic education for women. According to the director of the Bank's new Women in Development division, "across cultures and particularly in the earlier stages of development, education for women may well be the single most important intervention" (World Bank, 1988b, p.6). Given the importance of basic education in the lives of women, the creation of this new division may mean greater prominence for education in country lending.

d) Bank lending patterns in education from 1980-1988

The bank engages in policy advising and research, but it is the Bank's project loans which have the most immediate impact on education in the third world. The Bank's patterns of lending in the 1980s reveal several trends which add up to an ambiguous picture of the Bank's commitment to basic education as part of a a new orientation towards poverty. While some aspects of the Bank's lending programme appear to have been developing in ways which are consistent with the promotion of basic education in times of economic crisis; other aspects of the Bank's lending programme need to be changed before it is

be appropriate to the needs of the late 1980s and the 1990s.

Examining the Bank's distribution of educational projects and of funds is a significant but limited way to determine the Bank's policies and priorities for education in the 1990s, since it is difficult to disaggregate how much of the observed lending is the result of Bank priorities and how much is due to the expressed wants of recipient countries. Verspoor (1990, p.18) suggests that education is still regarded as an "investment in human capital" rather than a "welfare item". This may explain may explain some of the shortcomings of the Bank regarding a model of education based on the provision of basic education to the poor regardless of productive capability, as outlined in chapter 2.

The positive aspects of the Bank's lending record for basic education in difficult times include:

1) concentration on the poorest countries and regions of the world.

2) emphasis on building management and planning capacity.

3) a fairly even balance between large and small projects.

4) some reduction in the total amount allocated to secondary and tertiary education.

The negative aspects include:

1) a relatively small share for education in the total budget of the Bank.

2) uneven increases in the funds allotted for education,

3) a small share of education funds allotted to education in rural areas,

4) an ongoing need to concentrate more funds in countries where the needs (measured in terms of basic education indicators) is greatest.

Many of the indicators of World Bank lending for education change very slowly. The trends that can be identified are small ones, in only a few cases are they major or dramatic. Nonetheless, they form the background against which the Bank's commitment to "people-focused" development must be played out. According to Socknat (interview February 1990) some increases in the Bank's funds for education are planned for Africa, the focus of much of the Bank's anti-poverty work. He expects expenditures on education to increase from $624 million in 1985-1989 to $1.558 billion in 1990-1994. The notes below discuss some of the conclusion drawn from the figures at the end of the chapter.

***i. Figure 1***

World Bank expenditure on education grew, albeit unevenly, in the 1980s. In 1987, which appears to be an anomalous year, possibly because of the transition from Clausen to Conable, expenditures on education plummeted but appear to be recovering. The low percentage of total Bank funds devoted

on education gives substance to Fischer's and Zimmerman's call for an increase in funding for education, and provides a clear starting point for change in the Bank's educational lending.

The low percentage of funds allotted for education is representative of a a generally lukewarm Bank response to the need to increase funds for fighting poverty. Sandford (1989) examined the Bank's lending patterns from 1968 to 1986 in terms of percentage of funds allotted to key sectors with an orientation to poverty alleviation (rural development, small scale agriculture, primary and nonformal education, small scale industry, urbanisation, water supply and sewage) as a total of World Bank lending to all sectors. He found that this share had grown sixfold since 1968, and in 1986 was 29.2% of total Bank lending, the highest rate since the MacNamara years. (Sandford does not note that world poverty, as measured by virtually any index, is higher in the late 1980s than it was in the MacNamara years, so that if any index showing the ratio of world poverty to Bank expenditure on poverty were constructed, the Bank's performance would be seen to be steadily declining).

***ii. Figure 2***

The majority of education projects are channeled through the IDA - in other words, are directed to the poorest countries, which are IDA-eligible. These projects are made available on

the most lenient possible terms. The percentage of education projects channeled through IDA is greater than the percentage of total Bank projects channeled through IDA, indicating that in the realm of education at least, the Bank has a good basis for its claim that it is strengthening human resources to fight poverty. Education received an average of 8% of all IDA funds from 1981-1987 (Sandford, 1989, p.158).

It is possible that within these poor countries the bulk of funds received go to benefit elite groups. It is difficult to assess this as the Bank does not make its project evaluations public. Only since 1983 has the Bank required its staffers to monitor the impact on poverty of projects and programmes with which they are associated and, as Sandford points out, no uniform methodology exists at the Bank for calculating the distribution of project benefits among recipient individuals. Sandford's figures on World Bank education projects expected to directly benefit the poor as a percentage of all education projects (50% in fiscal 1984, 51% in 1985, 63% in 1986) indicate that the percentage is higher in the education sector than in other human resource sectors, such as population, health and nutrition, and water and sewage.

***iii. Figure 3***

The distribution of Bank projects by value has remained relatively constant through the 1980s. The great majority of projects are valued at less than $50 million, which is

somewhat smaller than the average project value for the Bank as a whole. This is consistent with the particular needs of the education sector, which is markedly less capital-intensive than other sectors funded by the Bank, especially with the Bank's new emphasis on primary-level projects. However, there has been no trend in the late 1980 towards smaller projects, which may be inconsistent with the Bank's stated desire to scale down its project lending and target its projects more specifically.

***iv. Figure 4***

None of the countries except Pakistan receiving projects valued at more than $100 million are among countries reporting greater than 60% illiteracy, according to the most recent Unesco Statistical yearbook. All are large industrialising countries, and the nature of the loans disbursed to them reflects the Banks' traditional emphasis on modernisation and higher levels of education. (The exception is Pakistan's primary education policy reform in 1987). While the size of these loans reflects in part the capital-intensive nature of the projects concerned, it also reflects the Bank's priorities, as one such huge loans could represent up to a quarter of the total value of the Bank's educational commitments for that year.

***v. Figure 5***

The distribution of the Bank's educational loans by region

shows a consistent pattern of preference for the poorest regions of the world and those with the least extensive formal school systems. Sub-Saharan Africa has generally been allotted the most projects, eclipsed by Asia for several years in mid-decade. However, if the total for sub-Saharan Africa is added to the total for the somewhat more prosperous regions of north Africa and the middle east, the total for that continental area is greater than that for any other part of the world. The preference for Africa is even more striking when considered in light of the size of Africa's population relative to that of the rest of the third world. However, Bank figures (World Bank, 1990, p.12) indicate that Africa received only 16% of total education funds, indicating that projects there are on a much smaller scale than in the rest of the third world. Within the context of total Bank lending to Africa, education projects will account for 7.3% of total funds channeled to Africa from 1990-1994 (interview with James Socknat, February 1990) - a percentage which has been growing but which is still low relative to the importance of education in development.

1988 saw the highest number of projects approved in sub-Saharan Africa since 1982. This trend should be maintained or increased, as both the Bank's own reports and research from other sources reveal an ongoing need for infusions of external aid money in order to expand existing levels of provision of education. None of the Bank's megaprojects

valued at more than $10 million have been in this region.

*vi. Figure 6*

There have been some significant changes in the number of projects allotted to certain aspects of education through the 1980s. The number of projects allotted to rural education (educational provision in rural areas, not the training of agricultural technicians) has fluctuated from 30.8% in 1980 to 5.3% in 1985, but appears to be on an upswing. It is still too early to tell whether this trend will be more stable, but an increase in the number of projects focused in rural areas is a necessary concomitant of any serious attempt to address the basic educational needs of the poorest. The same is true of projects focused on primary and basic education. While the proportion of these projects focused on these areas is greater now than it was at the time of the Bank's first drive towards basic needs satisfaction, it is important that this trend continue to climb.

Both secondary and tertiary education experienced a decrease in the number of projects funded. This is consistent with the Bank's position that user costs and resource re-allocation are the best ways to support higher levels of education, rather than continued injections of funds. This change in Bank lending, if it proves to be a permanent change, is especially noteworthy because the imposition of user costs or loans rather than bursaries programmes for post-primary education could alienate the 'modern' elite of third world

countries, a group on whose goodwill the Bank is dependent in order to implement its projects. According to Socknat (interview, February 1990), lending for primary education accounted for approximately 20.5% of funds expended on education in Africa from 1980-1984; increased to 35.8% from 1985-1989, and is expected to continue to increase to up to 40% in the 1990s.

The most striking change in project focus has occurred in the number of projects devoted to or having a substantial component of management and planning - usually to make do with less money; to change inherited systems of educational administration; or to adapt educational systems to modern planning techniques. As the Bank devotes more and more of its resources to adjustment measures and as educational management is again and again identified by the Bank as the primary concern of third world education, changes to management and planning processes will become an ubiquitous feature of education projects. As a possible result of the same forces which make management such a pressing concern, the number of projects focusing on research and curriculum development have declined. This may be because the economic climate of education in the third world is such that innovation and experimentation have become secondary to the rehabilitation and maintenance of existing systems.

## WORLD BANK EXPENDITURES ON EDUCATION AS % OF TOTAL EXPENDITURE

| YEAR | EDUCATIONAL EXPENDITURES | TOTAL EXPENDITURES | EDUCATION AS % OF TOTAL |
|---|---|---|---|
| 1980 | 440.1 | 11 462.7 | 3.83 |
| 1981 | 735.3 | 12 291.0 | 5.98 |
| 1982 | 526.4 | 13 015.9 | 4.04 |
| 1983 | 547.9 | 14 477.0 | 3.78 |
| 1984 | 693.8 | 15 524.2 | 4.47 |
| 1985 | 927.8 | 14 386.3 | 6.45 |
| 1986 | 829.2 | 16 318.7 | 5.08 |
| 1987 | 439.8 | 17 674.0 | 2.48 |
| 1988 | 864.0 | 19 220.7 | 4.49 |

NOTE:
All figures except percentages are expressed in millions of U.S. dollars.

Source: World Bank Annual Reports 1981-1988

World Bank lending for education is expected to total $5 billion in the period 1990-1994: 6% of total projected Bank lending during that time (Verspoor, 1990, p.24).

WORLD BANK EDUCATION PROJECTS FOR 1980-

| YEAR | NUMBER OF EDUCATION PROJECTS | % OF PROJECTS FINANCED THROUGH IDA |
|---|---|---|
| 1980 | 13 | 30.7 |
| 1981 | 19 | 52.6 |
| 1982 | 19 | 47.4 |
| 1983 | 21 | 57.1 |
| 1984 | 20 | 35.0 |
| 1985 | 19 | 47.4 |
| 1986 | 17 | - |
| 1987 | 14 | 64.3 |
| 1988 | 19 | 52.6 |

NOTE:
IDA is the International Development Association

Source: World Bank Annual Reports 1980-1988

Education lending has comprised 7.1% of total IDA lending over the last decade. It comprised 3.1% of total Bank-wide lending during that time (Verspoor, 1990, p.25).

## DISTRIBUTION OF EDUCATIONAL PROJECTS BY VALUE (IN $US MILLION)

| PROJECT VALUE | NUMBER OF PROJECTS PER YEAR | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 |
| <10 | 0 | 3 | 5 | 2 | 3 | 3 | 2 | 4 | 1 |
| 10-20 | 6 | 4 | 5 | 9 | 5 | 3 | 5 | 4 | 2 |
| 20-30 | 1 | 4 | 4 | 3 | 1 | 3 | 1 | 2 | 1 |
| 30-40 | 2 | 1 | 0 | 4 | 2 | 0 | 1 | 1 | 1 |
| 40-50 | 2 | 4 | 1 | 0 | 5 | 0 | 1 | 1 | 1 |
| 50-100 | 1 | 1 | 4 | 1 | 2 | 8 | 3 | 2 | 4 |
| >100 | 1 | 1 | 0 | 1 | 1 | 2 | 2 | 1 | 2 |

Source: World Bank Annual Reports 1980-1988

COUNTRIES RECEIVING WORLD BANK EDUCATIONAL LOANS WORTH MORE THAN $US 100 MILLION

| YEAR | COUNTRY AND DESCRIPTION OF PROJECT |
|---|---|
| 80 | South Korea: upgrading facilities for higher technical education |
| 81 | China: tertiary education and research in science and engineering |
| 82 | |
| 83 | Indonesia: staff training for the Ministry of Public Works |
| 84 | South Korea: graduate training and research in science |
| 85 | China: tertiary engineering and [illegible] education; Indonesia: post-graduate [illegible] for university teachers |
| 86 | China: management of higher education programmes; Malaysia: training of skilled technicians and industrial workers; Morocco: teacher training, foreign fellowships and research |
| 87 | Pakistan: primary education policy reform |
| 88 | Indonesia: efficiency improvements in higher education; Indonesia: modernisation of accountants' education; Turkey: technical and teacher training |

Source: World Bank Annual Reports [illegible]

## COUNTRIES REPORTING >50% ILLITERACY AMONG ADULTS 15 YEARS AND OLDER

### Africa

Algeria
Benin
Burkina Faso
Cape Verde
Central African Republic
Egypt
Ghana
Guinea-Bissau
Liberia
Mali
Mauritania
Morocco
Mozambique
Rwanda
Sudan
Togo

### The Americas

Haiti

### Asia

Afghanistan
Bangladesh
Nepal
Pakistan

### Middle East

Democratic Yemen
Iran
Syrian Arab Republic

### Oceania

Papua New Guinea

Source: UNESCO Statistical Yearbook 1985

NOTE: This information is based on census results reported by the countries themselves: in some cases the most recent census may have been a few years old.

DISTRIBUTION OF EDUCATIONAL PROJECTS BY REGION

| REGION | NUMBER OF PROJECTS PER YEAR | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 |
| Sub-Saharan Africa | 6 | 8 | 4 | 6 | 2 | 4 | 4 | 5 | [illegible] |
| North Africa/ Middle East | 1 | 2 | 6 | 5 | 4 | 3 | 4 | 3 | 2 |
| Latin America | 1 | 2 | 2 | 3 | 3 | 3 | 0 | 2 | 1 |
| Caribbean | 0 | 1 | 1 | 1 | 2 | 1 | 2 | 1 | 1 |
| Asia | 3 | 5 | 5 | 5 | [illegible] | 5 | [illegible] | 2 | [illegible] |
| Europe | 1 | 0 | 0 | 0 | 2 | 1 | 0 | 2 | [illegible] |
| Oceania | 0 | 1 | 1 | [illegible] | 1 | 2 | 1 | 1 | [illegible] |

Source: World Bank Annual Reports 1980-1988

## PERCENTAGE OF EDUCATIONAL PROJECTS WITH SPECIFIC FOCI BY YEAR

| | YEAR | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 |
| RURAL | 30.8 | 26.3 | 10.5 | 28.6 | 15.0 | 5.3 | 5.9 | 14.3 | 0 |
| PRIMARY /BASIC ED. | 31.6 | 21.0 | 38.1 | 38.1 | 35.0 | 32.6 | 29.4 | 35.7 | 36.8 |
| SECONDARY | 23.1 | 21.0 | 21.0 | 19.0 | 15.0 | 21.1 | 29.4 | 7. | 10.5 |
| TERTIARY | 38.5 | 21.0 | 0.0 | 14.3 | 20.0 | 21.1 | 17.6 | 0.0 | 15.8 |
| VOCATIONAL | 23.1 | 26.3 | 57.8 | 38.0 | 55.0 | 36.8 | 41.1 | 28.5 | 36.8 |
| PLANNING /MANAGEMENT | 7.7 | 26.3 | 10.5 | 52.4 | 25.0 | 47.3 | 52.3 | 71.4 | 47.4 |
| RESEARCH /CURRICULUM | 7.7 | 21.0 | 15.8 | 9.5 | 10.0 | 15.8 | 5.4 | 7.1 | 5.3 |
| TEACHER TRAINING | 23.1 | 26.3 | 47.4 | 28.6 | 15.0 | 26.3 | 17.0 | 14.3 | 10.5 |
| TOTAL # OF PROJECTS | 13 | 19 | 19 | 21 | 20 | 19 | 17 | 14 | 19 |

NOTES:
A "rural" focus does not include training agricultural technicians

Total percentages for each year are greater than 100% because most projects have multiple foci.

Source: World Bank Annual Reports 1980-1988: classifications based on brief descriptions given in the annual summary of projects.

# CONCLUSIONS

After examining the evidence on the plight of basic education in the third world, I am able to offer several conclusions based on the research questions identified in my introduction. These conclusions reaffirm the centrality of education in a model of development based on human needs and human rights; and offer cautious optimism about the possibility that Bank efforts could help to realise such an ideal.

Basic education has been shown to be valuable in many different ways, both as an end in itself and as a means to other development goals. The relationship between literacy and numeracy and such desired goals as lower population growth and agricultural productivity has been proven; and possible relationships between basic education and other desirable practices such as environmentally sound farming and gender parity provide scope for further research. The basic needs model of development, which identifies the quality of life of the poor as the main object of national development, is the model which maximises the relationships between education and other aspects of the quality of life.

Having established the centrality of basic education in

development, it becomes clear how seriousness of the decline in educational indicators and in resources for education becomes clear. The roots of this problem, such as growing population and shrinking budgets, are exacerbated by adjustment programmes designed to help countries reduce their deficits and pay back their international loans, but which can have a negative impact on expenditures for education and on the abilities of the poor to absorb educational investments. I believe it is pointless to attribute blame for the poor performance of adjusting countries either solely to the adjustment process or solely to the pre-existing economic crisis, but it is clear that adjustment policies based on government restraint do not favour the basic educational needs of the poor. It is therefore somewhat heartening to see that the World Bank is, albeit belatedly, considering the human impact of its adjustment measures and prioritising human development.

How far will the Bank go in promoting basic education in the 1990s? Many factors make the 1990s an ideal time for the Bank to prioritise basic education, while other factors limit the Bank's ability to respond to the challenge of basic education in a meaningful way.

The fate of basic education at the Bank may depend on many things besides the intrinsic value of education. Although its moral significance is indisputable, and a great deal of

rhetoric has been expended on the value of education, examination of the Bank's loans for education as a percentage of its total loans reveals that this moral value does not always translate into commitment.

It will be difficult for the Bank to make a major impact on basic education in the 1990s. First, there is the immense size of the problems facing basic education. It would be naive to think that a budget for education of $864 million, of which 37% appears to be targeted for basic education could significantly alter the situation described in chapter three. It is also naive to think that the expenditures of the Bank, or indeed of all multilateral aid organisations are a significant balance to the $50 billion annual net outflow from third world countries to their creditors. The Bank itself acknowledges that the magnitude of these problems precludes making progress in the direction of social and economic goals. Woods (1987, p.93-94) and the Bank's 1988 report on education in sub-Saharan Africa acknowledge that adjustment, rehabilitation and maintenance, rather than expansion, will continue to colour the Bank's operations in the foreseeable future. Woods refers to poverty-oriented programmes in general, while the Bank report describes education in particular. The Bank's main contribution to basic education may ultimately be its influence, measured in terms of intellectual influences (through publications, conferences, etc.) rather than through financial support.

Even if one accepts that the Bank's efforts will be small-scale compared to the magnitude of the problem, factors within the Bank may prevent it from contributing to the advancement of basic education as effectively as it might. It has been noted in chapter five that certain aspects of the Bank's lending programme in education are not completely appropriate to a model of education based on basic education. In addition, there are a number of factors in the Bank as a whole, not limited to the education department, which must be considered.

1. Verspoor (1990, p.33) states that the Bank education division is weak in terms of its own human resources. Many staff members are not informed of the most recent research and "have not been able to adapt to the demands of a changing operating environment".

2. The Bank is constrained by its prioritisation of third world debt and adjustment. As has been demonstrated in chapter four, debt reduction and the satisfaction of basic needs are not necessarily complementary goals. Alleviating debts and balance of payments problems is not necessarily a shortcut to poverty reduction, because even if all debt was cleared tomorrow, third world countries would still be faced with problems stemming from environmental crises, population growth and insufficient capital. If developing countries must make a choice between balancing the books and providing for

basic needs, the Bank's support for the choice of basic needs is not assured.

3. The Bank must compete in the field of third world aid with the aid priorities and organisations of the industrialised countries, particularly the United States and Japan. A World Bank study (Gulhati and Nallair, 1988) described the aid patterns of these donors as "less developmental" than average in a groups of eight Western nations, i.e., these donors based their aid-giving more on their share in the imports of the recipient and their political interest in the recipient, in terms of "colonial association, base rights, arms sales, etc." (p.1173) and less on poverty-oriented criteria such as population, per capita income and deficit (although it may be said that these criteria do not describe poverty as well as criteria based on basic needs satisfaction would). Given the influence which the United States has exercised on the World Bank, it is reasonable to assume that their "non-developmental" priorities would influence decisions at the Bank.

4. It may also be difficult for the Bank to bring its emphasis on private enterprise and the private sector into line with the needs of basic education. Because basic education is free, it does not generate a profit and thus does not appeal to private capital. In addition, basic education is by its nature more appropriate for a government

to undertake since it tends to be planned and implemented on a large scale involving nations or regions, and is frequently conceived of as a means of nation-building or as a consolidation of the political ties between the state and its citizens.

Some observers (e.g. Svendsen, 1987) have expressed concern that the Bank's increasing emphasis on private enterprise could be detrimental to poverty oriented programmes, the majority of which are not of interest to private enterprise. In the education sector, this danger does not appear to be particularly acute, because of the Bank's new policy of recommending that where major economic pressures exist, primary and basic education programmes should be publicly supported to a greater degree than higher education, in which user fees would become a major source of funding. However, in a Bank which is generally not oriented to strengthening the public sector, the education and training department may be somewhat anomalous. This may put them in a position of relative weakness at the Bank.

Despite the constraints inherent in the World Bank's situation, there are indicators that some conditions are favourable for basic education to receive the injections of aid which it needs.

In the late 1960s, a substantial body of research exists

which has established the importance of education to economic and social development. Methodologies have been developed which link education to indicators ranging from growth in individual income to increased agricultural productivity to modernisation of outlook. The amount of research on the significance of literacy and education is much greater, and the methods of analysis and much more sophisticated than those employed in the early and mid-1970s, when the Bank's initial drive against poverty was launched. This is particularly noticeable within the Bank, which has gone from being very dependent on the United Nations for its research to being able to produce a great deal of research itself.

This is shown by the greater number of references to research in the 1980 policy paper compared with the two earlier discussion papers (Psacharopoulos 1981); and is even more apparent in the World Bank's recent bibliography of its publications on human resources development. The World Bank produced 47 publications on education, the majority of them research-based, which ranged in format from journal articles to discussion papers in 1987. This number has been increasing throughout the decade, and compares favourably with 17 in 1982, 15 in 1983 and 8 in 1984. This accumulated body of research can provide the intellectual fuel for an increase in support for basic education.

The Bank's new emphasis on policy and institution-building is

also conducive to the expansion of support for basic education. Because basic education has a low unit cost and because its target group is the poor, who are the largest sector of the population, it tends to take the form of national or regional systems and policies, rather than being concentrated in specific institutions and narrowly defined programmes. In addition, because basic education is not assured of the support of the wealthier or more politically influential groups, it is in need of strong institutions and structures to sustain it.

This emphasis on strengthening policy and institutions is especially appropriate in countries where, due to lack of resources or social and political instability, the expansion of education is not feasible. Examples of nations in which the Bank is currently encouraging institution-building as a means of rehabilitation include Uganda (World Bank news November 17, 1988) and Chad (World Bank news, May 4, 1988). Decreasing conflict in many parts of southern Africa may make it possible for more rehabilitation of education systems to be undertaken in the 1990s.

In the 1980s, certain development priorities have emerged which are complemented by the expansion of basic education and which could contribute to renewed support for basic education.

The 1980s brought the belated recognition that national development was inextricably linked to the advancement of women; not only because women represented more than half the population, but also because women, by virtue of their role in the reproduction and maintenance of the family, were able to effect changes which resonate through many aspects of development. As noted in chapter 2, the education of women is linked to the containment of population growth, reduction in child illnesses and mortality, and increased family food production in those areas where women are the main support of the rural family. Despite this, the gap between women's and men's educational levels remains wide (INSTRAW, 1987). Many major development agencies, including the World Bank, have begun making some institutional changes as a result of their discovery of the importance of women. These changes include women's programmes and directorates, and requirements for project proposals to incorporates women into project designs or to include statements on impact on women. With such institutional changes in place, the ground is laid for advocates for women to press the demand for expanded basic education, as the World Bank Women's Directorate appears to be doing.

A second concern which has emerged more recently is concern for the environment and for developing means to prevent desertification, resource depletion and pollution. This may have interesting although as yet unproven effects on

education. The World Bank, like other organisations, has a policy on the environment which has nonetheless not prevented it from sponsoring major industrial projects with negative environmental impacts. The ecological imperative does not appear to have had the same impact on projects as the drive to incorporate women into projects, but this may change as the global effects of pollution become more and more strongly felt in the donor countries.

I am not aware of research linking environmentally sound practice practices to basic education, but it is logical that such a link does exist. Just as farming practices related to agricultural activity have been affected by increased literacy, so it is possible that farming practices affecting soil, water or trees would be affected as well.

Basic education has certain characteristics which could make it palatable to an essentially conservative institutions such as the World Bank. In addition to the benefits to development outlines in chapter two, the basic needs model of education has the additional merit of being superficially politically neutral, unlike other approaches in which literacy and basic learning are seen as means of conscientisation or of advancing social change. It thus manages to address the needs of the poor without being "tainted" with radicalism or political unacceptability. The means used to achieve the goal of universal basic education, on the other hand, such as the

decision to switch resources from financially productive sectors to sectors with more impact on human development, raise more overtly political questions.

Because the direct benefit of basic education to the industrialised countries is less than its moral value and political utility, agencies such as the World Bank will probably always underfund basic education relative to its value to national development, as is shown by the relatively small share allotted to education in the Bank's budget. The notion of education as a human right or need must be supported by the notion of education as a major contribution to national development, because human rights are not always a highly valued currency. Research documenting the utility of basic education in national development is necessary as a complement to the generally accepted idea that education is a human right.

As a glance at the volumes of literature on third world education will confirm, a vast amount has been written on education, basic education, development and aid. Nevertheless, I believe there are certain areas of research which need to be pursued, both to reaffirm the centrality of basic education in development and to define the role of the Bank and recommend new directions for the Bank's involvement with basic education.

The latter set of research areas is particularly germane at the beginning of the 1990s when the Bank appears to be poised to give more priority to the needs of the poor. Such areas include: studies of the way that the Bank's vaunted re-emphasis on the needs of the poorest changes the Bank's work at the project level, as well as the level of research and policy; seeking out more examples of countries which have undergone the adjustment process with minimal damage to the satisfaction of the basic needs of the poor, and determining whether they could be used as models for successful adjustment (the attention being given to Ghana's PAMSCAD as an example of such research); and the implications of the early signs that the sub-Saharan economic recovery for educational projects.

In order to more clearly define the role of basic education in development, certain other research priorities should be followed. These include

1) studies designed to increase the efficiency of education. Most World Bank officials agree that research into the quality of education is needed now, specifically into determining the school inputs which have the greatest impact on quality (such as textbooks) as opposed to those that have a lesser impact (such as lower student-teacher ratios). Some research (e.g. Fuller 1986) suggests that the human aspects of educational inputs such as teaching methods and classroom organisation have been underresearched relative to

educational "hardware" such as new educational technologies. In addition, research is needed to find ways of assessing the output of schools in qualitative terms, of determining exactly what information students have received and what cognitive skills have increased. Lockheed (interview, February 1990) suggests that methods of analysis of educational projects must shift away from analysis of input, such as number of student places created; to analysis of output, such as scores on standardised achievement tests. To make this shift, research into evaluation is needed

2) research into the relationship between basic education and other desirable social goals (desirability being determined by the satisfaction of human needs). Much research has been done into the relationship between education and fertility; and between aeducation and agricultural productivity. In order to convince institutions such as the Bank to spend more on basic education, research into other links is merited. Such links could include the relationship between education and environmentallly sound practices; the transgenerational effects of education (i.e. the extent to which children of mothers with basic education inherit positive social behaviours); and the impact of education on the informal sector of the economy.

In the current climate of global economic difficulty, the pressures on education cannot be alleviated without drea

changes in the world, changes which are outside the scope of the World Bank to affect. In the absence of such changes, the Bank must use every means possible to justify its support for basic education, in the hopes that maintenance and rehabilitation may some day give way to progress and expansion and that basic education may be allowed to flourish and to make a concrete contribution to the lives of the people of the world.

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