Funding a fair education system

Raising the issue of funding education through household contributions and making a study of household costs for different levels of education has the effect of prompting debate. Discussion of these issues was previously stifled by the Dakar “consensus” and its implementation by states and their partners in favour of implementing a (long-awaited) resolution to achieve Universal Primary Education (UPE).

The consensus – to push for UPE – was reached between proponents of two different visions for education and its funding: those defending a “right to education” and those with the economist’s view of education as an “individual and collective investment in development” had no difficulties in agreeing upon the necessity of free education at primary school level. As such, the issue of (state/private) education funding for the entire education system was shelved in favour of a macro-financial roadmap (based on funding shortfalls) for implementing “credible” education plans.

The success of the UPE initiative, and its effects on the post-primary school demographic, show that the issue of funding – not only in overall terms, but as a system of individual incentives which would make education policies both fairer and more efficient – should be a major factor in determining the soundness of education plans. Often, making education free is not enough to ensure that all children have access to and are able to complete primary school. At the same time, in higher education, the significant part of public funding and continuing financial incentives for individuals which do not correspond to actual job market needs are distorting demand for education. Furthermore, they have inverted the redistribution of collective funds and, most of all, deprive the system of means for reform (quality higher education geared towards supplying economies with what they need, mass TVET, additional support for basic education, etc.).

By showing that the percentage of total education funding contributed by households decreases for higher levels of education, the data gathered by the Pôle de Dakar highlights the unfair nature of current education policies (see our report). It should provide the opportunity to go beyond this observation and assess how much room for manoeuvre there is for defining policies more in line with the Dakar framework, which would be the result of a partial privatization of secondary and higher education funding.

Jean-Pierre Jarousse
Pôle de Dakar Coordinator
UNESCO unveils its action plan for teachers

In front of an audience of 200 people attending the Bamako+5 Conference on Contractual Teachers in October, the UNESCO Regional Bureau for Education in Africa (BREDA) unveiled its teacher policy action plan in African countries. From this year, the countries will be assisted, by Pôle de Dakar among others, in analysing their teacher policies and identifying possible improvements.

“Teacher policies,” announced Ann Therese Ndong-Jatta, head of BREDA, to the conference delegates.

The purpose of this sub-regional conference, which took place from 27-29 October last year, was to assess progress made since 2004 in African countries on the issues of primary schooling and of contractual teachers’ working conditions. It also aimed to think about new ways of improving contractual teachers’ career development. On this occasion, Pôle de Dakar presented an analysis of the developments in primary schooling since 2004.

The TTISSA initiative goes operational
UNESCO organised a two-day workshop, in the form of a pre-conference, in an aim to draw up an operational strategy for BREDA. The launch of the TTISSA analyses in countries was the main focus of the work, but enhancing teacher skills and training establishment performance as well as incorporating communication and information technologies in teacher training were topics that were also addressed.

Pôle de Dakar again highlighted the results of the study published in 2009 on the teacher challenge and universal primary schooling in Africa. The content of the TTISSA methodological guide, which aims to prepare the ground for analyses, was also presented in detail. Finally, the decision was made to create a steering committee for TTISSA. The initial tasks of this committee, which met for the first time in January 2010, were to set out selection criteria for beneficiary countries as well as plan an operational timetable.

Pôle de Dakar extends its scope of activity

Increasingly in demand from countries to work on medium-term expenditure frameworks (MTEF) in education, Pôle de Dakar organised a training session on this theme for its education policy analysts in December.

“MTEFs are a valuable tool because they ensure the coherence of a government’s plans for education, the concrete steps necessary to achieve them and their integration in the country’s budget”, maintains Blandine Ledoux, education policy analyst at the Pôle de Dakar and training organiser. “When costing the actions to be undertaken over a three year period, MTEFs are key in moving from the objective definition phase to operational implementation of educational policy.”

Thus, from 8-10 December last year, four specialists in the subject were invited to present the tool in detail, as well as their MTEF implementation methods for the educational sector. A fairly wide variety of practices came to light, and Pôle de Dakar is taking them into account when defining its own.

As Jean-Pierre Jarousse, Pôle de Dakar coordinator, emphasises, “the expertise which we are currently developing will further prolong the support we already offer in the financial analysis of education – in sectorial diagnostics – and in financial frameworks. It also enables us to make progress in setting up financial simulation models, progress which will soon be reflected in the content of our distance training.”

Since December, Côte d’Ivoire and Cameroon have requested Pôle de Dakar’s support in implementing MTEFs.1

Last September, an agreement was reached in Paris which will enable Mali to feel secure in entering the third phase of its Education Sector Investment Programme. Education and Finance Ministry representatives for Mali, and the country’s main technical and financial partners agreed on education policy priorities to implement and finance for 2010-2012.

“The September workshop provided an opportunity to discuss with our partners and make strategic choices for our education system,” noted Youba Ba, the Administrative and Financial Director for the Ministry of Education, Literacy and National Languages in Mali. “Over the next few years, one of our priorities is to provide a basic nine year education to the greatest possible number of children. We also wish to go forward with the decentralisation of our educational system, and to provide more short technical and vocational training schemes.”

Establishing a financial simulation, to ground discussions between the Malian government and its partners, took up a large part of the workshop. The aim of the financial simulation model, which was devised with the support of the Pôle de Dakar and the World Bank, was to explore education policy options and determine their achievability. As Guillaume Husson, an education policy analyst at the Pôle de Dakar, explained: “The principle underlying a financial simulation model is to establish a projection, over several years, for both a country’s resources and the expenditure associated with various education policy options, and then to compare the two to determine whether these options are sound.”

Thus, taking 2020 as a cut-off point, the simulation model was used, on the one hand, to estimate national resources which could be made available to the education sector in Mali. On the other hand, it projected costs for implementing various policies backed by Malian officials, for all education sub-sectors. By comparing costs and resources, it was then possible for those involved to establish and select the more realistic options, and determine funding requirements for the education system.

“The final product is the result of sustained discussions; it is a testimonial to the Malian authorities’ commitment to achieving universal primary education as quickly as the country’s technical and financial situation will allow,” stated Laurent Cortese, until recently a Project Manager at the French Development Agency. “Three high priority areas were earmarked for support: continuing the school-building programme, putting measures in place to overcome regional inequalities and improving student mobility between different levels of education.”

Since the September workshop, nine regional financial simulation models, applying national objectives on a regional level have been in development. Furthermore, the country is preparing another Fast Track Initiative Catalytic Fund application.

Support for upcoming projects in Mali

Along with Malian officials, nine representatives from technical and financial partners (including the Pôle de Dakar) attended the workshop organised by the French Development Agency to support the Malian Education Sector Investment Programme.
The issue of education costs to families, long overlooked in discussions in Africa, is now being raised in relation to two problems. On the one hand, families' ability to contribute to education funding is becoming a pressing topic with African states looking to fund expansions in their education systems. On the other, more and more analyses reveal inequitable policies at work in many countries, and that education costs often constitute an obstacle to education, particularly in the poorest areas.

The issue of education costs for families, which until now had received little attention, has thus become a priority. Over the past two years or so, Pôle de Dakar has been investigating the matter in a number of studies and work on establishing a methodological framework. This report sets out some of the results emerging from ongoing work, in particular those taken from a preliminary analysis of 18 sub-Saharan African countries. It also presents the main outlines of the methodological challenge faced by analysts.

A vital contribution to education systems

Over the 18 African countries which were part of the study, 3.6% of household expenditure, on average, goes towards education. However, this figure is subject to significant variation from country to country. In the Congo, Chad and Niger, for example, the average household devotes less than 1% of its total expenditure to education. In Uganda and Benin, the percentage is 10 or 13 times more.

The proportion of this household expenditure in national education spending shows families playing a significant part in funding education services: on average, their contribution makes up 32.1% of total expenditure. This means that households contribute half as much as the state does towards education. In some countries, households even contribute more towards education than the state. In Sierra Leone, in particular, household contributions make up 58% of all education funding.

Similar financial burdens, but different opportunities for poor and affluent households

Evaluating education expenditure based on household wealth is one particular aspect which Pôle de Dakar has examined. Analyses show that well-off households generally devote a higher proportion of expenditure to education. Thus, over 16 countries, 4% of total household expenditure went towards education for more affluent households, on average, while this figure was 2.8% for the poorest households. Overall, however, there is not a huge difference between the two... There is enough evidence to conclude that education makes up a similar proportion of a poor household’s budget as that of an affluent one.

However, the chances of children from well-off households of entering education are much higher than those of children from poor backgrounds. Indeed, over half of those who did not go through education come from the poorest 40% of households. To explain this, one must understand that, 1 Benin, Burkina Faso, Cameroon, Chad, the Congo, Côte d’Ivoire, Djibouti, Guinea-Bissau, Madagascar, Malawi, Mali, Mauritania, Niger, Senegal, Sierra Leone, Tanzania, Togo and Uganda. Data has been gathered from a number of household budget surveys, carried out between 2001 and 2006.

1 Private (household) and public (state) spending combined.

2 Private (household) and public (state) spending combined.
Overall, household contributions make up a greater part of education funding for lower school years (primary and lower secondary school) than for higher years (upper secondary school and higher education) (see graph). One may deduce that education costs may therefore constitute an economic obstacle to education for less affluent households. Studies also show that poor households benefit less from national education expenditure than affluent households. Indeed, few children from poor households reach the higher levels of education. For example, only one in ten students in higher education come from the poorest 40% of households. Conversely, children who stay in education longest are usually from affluent and urban backgrounds.

Furthermore, educational resources tend to be unevenly distributed. On average, in the countries studied, almost half of the total education expenditure was monopolized by the most educated 10% of individuals, throughout their academic careers. In countries such Madagascar, Sierra Leone, Senegal or Uganda, 60% to 70% of national education investments are used by those with the most education, who are also more privileged to start off with.

A different distribution of state expenditure could play a part in reducing these disparities and provide more equal opportunities for young people from different backgrounds. However, in all the countries in the study, the way public education budgets are spent reinforces the already high levels of social selectivity in attaining higher levels of education.

How are household education expenses calculated?

Estimating household education expenses presents real methodological difficulties, because very few surveys have been devoted specifically to this question. However, household surveys such as “household budget” are carried out regularly in the countries being studied. These provide information on which household members are in education and related costs.

These surveys are also an invaluable source for the data which Pôle de Dakar uses as a basis for its studies. But the concrete methodological difficulty is that, in many cases, education expenses are recorded collectively, for the entire household. The challenge therefore consists in finding a reliable estimate for how much households spend on average on each child in education, depending on what level of education they are at.

This methodological issue, which has rarely been tackled, requires significant work. Initially, the Pôle de Dakar used an econometric technique for estimates which, broadly speaking, consisted in splitting total household education expenditure between different education levels, then between the number of children educated at that level. However, refining this technique is an endeavour which has kept Pôle de Dakar busy for several months.

Indeed, as Ibrahima Dao and Mireille Ravelojaona, both Pôle de Dakar statisticians, explained: “Our estimates must also take into account the fact that certain costs, such as transport or books, are not proportional to the number of children. Moreover, a household with an income of 10,000 Francs a month and one which earns 20 times that will probably not spend the same amount on education for their children, and will not spend it in the same way.”

A new technique for estimates therefore aims to take household behaviour (such as choosing a private or a public educational institution, for example), into account, as well as certain factors which are likely to influence spending on education: income, geographic location (rural/urban), sex of the household head and the children. Currently, the Pôle de Dakar is continuing its research, using data from ten African countries, with the aim of drawing regional comparisons.
Gorgui Sow is the regional coordinator for the Africa Network Campaign on Education for All (ANCEFA), an organisation which contains 32 national coalitions and whose aim is to allow the African civil society an opportunity to campaign for a free education for all. Mr Sow is responding to the first figures from the Pôle de Dakar on the cost of education to families.

In what way do these first figures on the cost of education to families contribute to the debate on the financing of education in Africa?

These first figures serve to show us the importance of the role that must be played by African government in public education. They bring to light and document three fundamental problems with the educational funding in Africa. The first problem is the poverty of households in comparison to their demand for education. The figures show that the demand for education is only satisfied if the households are able to contribute financially to their children's education. Thus the poverty of households is indeed an obstacle to education. To put it another way: the question of the right to education is becoming more and more rhetorical, as the only households who have access to this right are those with sufficient resources to send their children to school and keep them there.

The second problem is in the matter of equity. In every African country, the question of exclusion from school concerns the majority of children and public education is under threat. Poorer children have difficulty in entering public education, which in its turn has difficulty in maintaining standards. With the result that households which have the means send their children to private school. This brings us to the third problem, which is the increase in the privatisation of education. This privatisation is no longer restricted to higher education but is gradually spreading to secondary, middle and primary levels.

ANCEFA demands free education for everyone. How do you feel when you see that, taking all levels of education into account, the system currently favours better off families?

We have the same reaction: it is an even stronger reaction to governments which are not ready to make an effort to provide public education for poor families and to those groups which are excluded today from the educational system. For ANCEFA, the current educational systems, particularly in French-speaking countries, are not founded on an African vision, but on a colonial and elitist approach. For whoever speaks of elitist system is speaking of selection, exclusion and marginalisation and only speaks of things which are contrary to an endogenous development.

But our case does not stop there. It also calls to account the World Bank and the International Monetary Fund, which encourage the hiring of teachers who are less well qualified to teach the poor. We recognize that a large-scale recruitment of contractual teachers has allowed for considerable progress to be made in the matter of access. Nonetheless, the question of the quality of schooling for the poorest children remains. To reconcile both access and quality, our organisation therefore demands that, firstly, the resources allocated by the African governments to education are increased. Secondly, we demand the revision of national teacher training and professionalization policies.

How can your organisation take into account all these factors whilst still continuing to promote free education for the poorest?

These factors can fuel research for our cause in the framework of our Observatory for education in Africa, by putting facts at the disposal of the national coalitions that they often do not have the means of gathering themselves. Furthermore, they support our cause in favour of education as a prime contributor to democracy. That families contribute so much to the funding of education is an aberration for ANCEFA, because there are some very rich countries in Africa. The problem is that the African governments have other priorities than education, the first being often security and the preservation of power.

The financing of education is not an easy question, but that does not mean there is not a solution. This year, ANCEFA and the Global Campaign for Education are launching the “1Goal” campaign, in partnership with the FIFA (Fédération Internationale de Football Association). It is a way of attracting the attention of the decision-makers of this world to the fact that it is in our interest to put more money into education and to protect the interests of communities, especially the poorest, if we want to achieve the Millennium Development Goals.
In 2009, 14 African countries received or requested direct support from the Pôle de Dakar with regards to sector analysis in education, financial frameworks and defining education policies. By helping to devise credible plans for developing education systems, these support activities will enable most of the countries to prepare Fast Track Initiative Catalytic Fund applications. Below are the main outlines of the steps taken in each country as of this date.

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<td>10. Application to the Fast Track Initiative’s Catalytic Fund</td>
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This October, the Dakar francophone digital campus welcomed the third promotion of candidates to the Sector Policy and Education Systems Management (PSGSE) training. Altogether, 29 new candidates from four African countries will devote their energies to completing the distance learning postgraduate course which runs till December 2010.

“In 2007, I took part in an evaluation project involving Protestant schools in Cameroon,” explained Blaise Yonta Tamougue, a new PSGSE candidate. “But I felt I lacked the adequate training... It was then that I decided I wanted to acquire new skills in this area.” He added: “This first group meeting on campus has put me at ease. Before coming, I was unsure about how the distance learning course would work, and was worried I did not have the prerequisite technical skills. Not only were my worries put to rest, but I quickly picked up the fundamentals of evaluation through the classes I took.”

The current state of educational systems in Africa: country files and regional files 2010

Pôle de Dakar

Issued for the first time in 2005, the files produced by Pôle de Dakar have acquired their reputation from the way that they synthesize the current state of affairs in the African educational systems – in two pages with pictures and using key indicators. In the new series for 2010, there is a major innovation: in addition to the 53 country files there are now regional files, corresponding to the country groupings. There are four types of grouping: by geographical zone, by level of development, by regional economic community and by UNESCO cluster office activity zone.

Start of a new PSGSE school year

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ON THE AGENDA

JANUARY 2010
• Launch of a financial framework support for Cameroon
• Launch of a sector analysis for Mauritania

FEBRUARY 2010
• Launch of a sector analysis for the Gambia
• Virtual meeting of the 3rd promotion of PSGSE students