



United Nations  
Educational, Scientific and  
Cultural Organization



# **Regional Thematic Consultation of the Western European and North American States on Education in the Post-2015 Development Agenda**

Paris, France, 5-6 December 2013

Development Assistance for Education Post-2015

**Kenneth King**



## **Regional Thematic Consultation on Education in the Post-2015 Development Agenda of Western European and North American States (Group I Countries<sup>1</sup>)**

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### **Development Assistance for Education Post-2015**

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This paper was commissioned by the UNESCO Education Sector in consultation with the UNICEF Education Section as a background paper for the Regional Thematic Consultation of Western European and North American States (Group I countries) on Education in the Post-2015 Development Agenda. This paper is a contribution to the Global Thematic Consultation on Education in the post-2015 Development Agenda.

Published in 2013 by the United Nations Educational,  
Scientific and Cultural Organization  
7, place de Fontenoy, 75352 Paris 07 SP, France

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## Introduction

This background paper examines the implications of the post-2015 education agenda from an aid perspective. It does so by analysing how Western European and North American countries have been referred to in the main strands of the post-2015 literature relating to education; how current priorities in the post-2015 education proposals might affect future development aid; how the donors have responded to Education for All (EFA) and the education-related Millennium Development Goals (MDGs) since 2000; how the changing aid landscape and wider range of aid providers could impact on the financing of education post-2015; how innovative financing could contribute to the post-2015 education agenda; and finally how there could be improved allocative efficiency in development assistance.

### 1- Educational Aid in the Post-2015 Development Literature: Implications for Western Europe and North America

We have argued in previous papers (King and Palmer, 2013; 2012) that one of the reasons for the preoccupation with post-2015 in many, but by no means all, Western European and North American countries is precisely its perceived close connection with development assistance. Within the education sector in particular, future support to new versions of the education-related MDGs, to specific EFA Dakar Goals, or even to education beyond EFA, are seen to be intimately connected to how education and skills development are presented in any final post-2015 agenda. There is an acute awareness also that, in general, aid is falling towards the end of the fifteen-year period since 2000, not least because of the post-2008 economic crisis in so many Western European and North American countries. The current funding gap (both external and domestic) of \$26 billion to reach even three of the six Dakar Goals by 2015, in just 46 countries (discussed in more detail in the third section) is well-known; but less frequently are there calculations of the costs of moving from, for instance, merely *'expanding and improving comprehensive early childhood care and education'* (existing EFA Goal 1) to making EFA Goal I truly universal as in the recent UNESCO proposal - *'equitable access to and completion of at least 1 year pre-primary'* for *all* children (Objective 1 of UNESCO, 2013a: para 37. Emphasis added).

Similarly, the figures of 57 million children out of school, 69 million adolescents not attending secondary, or 250 million children of primary school age not able adequately to read and write, despite some years of schooling, are equally well-known; but the costs of addressing the quality challenge of the 250 million are likely to be much more ambitious than only dealing with the access challenge of the 57 million. In other words, dealing with the quality demands of the **present** EFA Goal 6 has not yet been factored into the stated funding gap for reaching EFA by 2015, let alone the much wider concerns with quality and learning outcomes appearing in so many of the post-2015 aspirations and proposals.

If **finishing the job** on the existing EFA agenda would be a huge additional challenge for educational aid and domestic funding post-2015, the implications of what may be called an **expanded** EFA agenda are much more dramatic. This would involve, for instance, moving from merely *'expanding'* or *'achieving a 50% improvement'* in the present goals for early childhood and adult literacy respectively to **universal** coverage. There would be massive further costs by including universal lower secondary in the funding calculations as is proposed by the High Level Panel (HLP, 2013).<sup>2</sup> However, there have been calls for *'Education beyond 2015'* to go beyond lower

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<sup>2</sup> This was also called for by the Director General of UNESCO in her foreword to the *EFA Global Monitoring Report (GMR)* of 2012: *'We can achieve universal lower secondary education by 2030, and we must'* (p.i). The Report itself supported lower secondary as a global target for post-2015 (Ibid. 300).

secondary, and not least in document 37 C/56 discussed in the General Conference of UNESCO on 7<sup>th</sup> November 2013. Objective 2 of this document proposes that 'Equitable access to quality upper secondary and tertiary education is ensured' as one of the possible objectives of the post-2015 education agenda (UNESCO, 2013a: 9). There are also calls in the HLP for the post-2015 agenda 'to go well beyond the MDG focus on primary education', since the crucially important utilisation of technologies 'requires universities, technical colleges, public administration schools and well-trained skilled workers in all countries' (HLP, 2013: 17). The Open Working Group (OWG), too, covers a wide landscape for the post-2015 agenda, and sees the need in increasingly knowledge-based societies for 'greater emphasis on secondary school and even tertiary attainment' (OWG, 2013: para. 82). A final two examples come from the Sustainable Development Solutions Network (SDSN) which has a whole series of recommendations 'that would support an expansion of higher education' (SDSN: 2013:80), and from the UN System Task Team on the Post-2015 UN Development Agenda Issues Brief on Education and Culture which suggests that 'all youth and adults ...access post-secondary learning opportunities' (DESA-UNDP, 2013b: 5).

By no means does all the education literature connected to 2015 and post-2015 assume an expanded, post-secondary vision of education for all. Not surprisingly, the EFA Global Monitoring Report (GMR) is concerned with the trade-offs between aid to basic education and aid to post-secondary education. For several years it has drawn attention to the fact that around three quarters of direct aid to post-secondary education is in the form of imputed student costs and scholarships in host countries. For instance the top four donors to this form of 'aid' in 2010 were Germany, France, Japan and Canada (UNESCO, 2012: 219).<sup>3</sup> The same focus on EFA at primary and lower secondary would be true of the Global Education First Initiative, with its firm commitment to putting every primary child in school and also the out-of-school post-primary youth, and ensuring that both get access to quality learning ([www.globaleducationfirst.org/218.htm](http://www.globaleducationfirst.org/218.htm)).

It might be thought that the majority of the international NGOs (INGOs) or national NGO coalitions would support a focus on the original EFA agenda of Jomtien and Dakar, as it is particularly the poorest children, marginalised, disabled, affected by conflict or child labour who make up the 57 million out-of-school pupils at primary level. This is certainly the case with the US Basic Education Coalition (BEC, 2013), and also with Save the Children's powerful, and research-based statement about *Getting to zero: How we can be the generation that ends poverty* (Save the Children, 2013). There is a strong awareness of the role of domestic resourcing, but equally it is anticipated that both innovative financing and traditional official development assistance (ODA) will be vital. A parallel approach to this is sponsored by the Global Campaign for Education (GCE) with a firm emphasis on the right to education (and not just schooling) and powerful support to adult education and adult literacy (GCE, 2013a). An equally powerful case was put forward by 22 like-minded civil society organisations on the 'Right to education in the post-2015 development agenda', and again the right to education also covered adult literacy and adult education (Civil Society Joint Statement, 2013). Both these statements about education post-2015 consider it as crucial for national governments to allocate at least 20% of their annual budgets to education, and for 'all bilateral donors to allocate at least 10 per cent of their aid to basic education' (GCE, 2013a: 2; Civil Society Joint Statement, 2013: 4).

In addition to the approaches of **finishing** existing EFA and **expanded** education beyond 2015, there is a further approach that can be identified in the post-2015 literature which may be termed a **one-world** or North-South approach. This argues that the post-2015 agenda should no longer be primarily for the developing world, as it has been for the last 23 years since Jomtien. Rather, any new development framework should be universal and relevant to all countries, including any education goal or targets. These should speak equally to both North and South. Such an approach may be illustrated in the two targets of Education International which not only cover 'a full cycle of continuous, free quality early childhood, primary, lower and upper secondary education' but also

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<sup>3</sup> The OECD DAC no longer considers these imputed student costs as country programmable aid.

specify that by 2030 'all young people and adults have equitable access to quality post-secondary education and lifelong learning' (Education International, 2013).

A very strong statement of such a one-world approach is also adopted by the Danish Civil Society Organisations. Their statement of five fundamental principles includes the position that 'the new global set of goals shall not only apply to developing countries, but must commit all world countries'; furthermore, in aid terms, they state that there must be legally binding sources of finance for development, including a minimum of 0.7% of GNP for all rich countries, and that Denmark should return to its former 1% of GNP (Danish Civil Society Organisations, 2013: 2, 8).

The Learning Metrics Task Force (LMTF) also adopts a global, one-world approach to their set of recommendations, and although the countries that have expressed an interest in working with the LMTF in their current implementation phase are primarily from the Global South, there is the possibility of South Korea and of a number of US States participating also in different dimensions of this process. With LMTF, too, there is a firm commitment that 'the education community, and donors in particular, must ensure that no country is precluded from measuring learning due to the costs associated with purchasing and administering tests' (LMTF, 2013: 32).

In concluding this section, it may be important to make two rather different points about the financing of actions on such global targets as may be agreed. First, there is recognition that there is a literacy problem with many millions of both youth and adults in the OECD countries; indeed the EFA GMR 2012 acknowledged, in a policy focus, the importance of strengthening adult literacy in rich countries. Some 160 million adults are estimated to be at risk with only poor literacy skills. And the costs of dealing with these large numbers would be high, even if the funds do not come from ODA budgets (UNESCO, 2012).<sup>4</sup> Second, there is a strong message in much of the literature on education and skills post-2015 that the schooling of millions of young people in the developing world is being jeopardised by aid reductions.

Putting specific numbers on to the amounts of ODA from particular sources is critically important, rather than presenting national governments and development agencies with gross figures such as US\$26 billion of a funding gap. This is the value of the EFA GMR calculation of figures such as \$5.3 billion which could be secured if those nations which had already committed to reach the 0.7% for their ODA actually did so (UNESCO, 2013b:8-9). Arguably, for donors to be able to translate the goals into very specific financing targets is a high priority. But hopefully we have shown in this section that this cannot be done without clarity on what precisely is the realistic coverage of the education goals and targets in any global development agenda, past, present or future.

## **2 - Impact of the Current Post-2015 Debates on Development Assistance to Education and Skills**

Having examined just a little of the complexity of the education and skills themes in the current post-2015 debates, it may be premature to estimate their likely impact on patterns of development assistance. It will not be until 2015 that the shape of the final text of any educational goals and targets will be almost clear. But a few things can be said with a degree of certainty even now.

The surest outcome of the present debates about future priorities is that quality in basic education will be pursued. Pressure for ODA to address this has become almost unstoppable with the evidence discussed above

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<sup>4</sup> The costs of dealing with some 5.7 million adult learners in the UK between 2001 and 2007 reached no less than US\$8 billion (ibid. 103).

that 250 million young people have basically failed to learn despite being in school for up to four years. Consequently, most of the formulations of new education goals for post-2015 have included the word 'quality'. Thus the illustrative education goal of the HLP was 'Provide quality education and lifelong learning', and similarly no less than three of the five 'Objectives' of UNESCO's 37C/56 document on Education beyond 2015 (UNESCO, 2013a) make use of the term quality.

But the real challenge will be the operationalisation of quality in practice. Many of the proposals being discussed focus on literacy and/or numeracy as basic skills which all students should acquire. Thus the HLP talked of 'every child...able to read, write and count well enough to meet minimum learning standards' (HLP, 2013: 49), while UNESCO's 37C/56 document more broadly mentioned 'good quality with recognised and measurable learning outcomes based on national standards' (UNESCO, 2013a: 7). The danger could be, however, if quality gets turned into one or two easily measurable learning outcomes of literacy or numeracy in the early grades. The temptation will be to pursue what could be called the 'quantification of quality' through assessments that are easy to administer. This could be damaging for the key role of teachers in encouraging critical thinking and creative, innovative approaches even from the earliest years.<sup>5</sup>

While early grade reading and maths assessments have been one approach to the measurement of learning (and of learning goals) in primary schools, a rather different approach has been the elaboration specifically for developing countries of an adaptation of the Programme for International Student Assessment (PISA). PISA for Development (PFD), supported by aid, will, over the next three years, be trialling instruments at age 15 which will be adapted to local contexts but must still be robust enough to maintain comparability with the international PISA scales (OECD, 2013a).<sup>6</sup>

Another of the priority themes that has been evident in so many of the proposals is 'inequality'. This became a key cross-cutting theme in the HLP across all the illustrative goals to ensure that everyone 'irrespective of household income, gender, location, ethnicity, age or disability' has access to key services (HLP, 2013: 24). But what such an approach means in practice for development agencies and NGOs is a 'data revolution' in which results are 'disaggregated by income, gender, ethnic, religious, rural/urban, regional, age and disability groups' (Save the Children, 2013: vi). However, like quality, translating this very proper concern with equity and inequality into practice could require putting systems in place for the collection of data that are reliable, comparable and disaggregated. For weaker countries, this could have considerable implications for future aid to capacity building in educational planning and statistics.

The emphasis on the crucial importance of 'skills' or 'skills development' by the EFA GMR in 2010 and 2012 (UNESCO, 2010; 2012) and also by many development partners and national governments has secured their place in the discussions related to post-2015 proposals. However, as we shall mention in more detail below, 'skills', like quality and equity, is a very slippery term. So it is one thing to propose to 'develop skills and competencies for life and work' (UNESCO, 2013a: 9) as a post-2015 objective, but translating these into instruments that can be used in the many different locations of formal and informal training could be a massive undertaking, as many countries are recognising.<sup>7</sup>

But even 'access' will be affected by the new proposals around post-2015. The bald numbers of 57 million out-of-school children at primary level, or 69 million adolescents at lower secondary, will also need to be disaggregated, in terms of the categories just mentioned for equity, including the acknowledgement that many of these young people live in fragile states.

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<sup>5</sup> For concerns with the 'quantification of performance' in Tanzania, see Languille (2013).

<sup>6</sup> Countries likely to be part of the PFD pilot are Cambodia, Ecuador, Guatemala, Senegal, Sri Lanka and Zambia.

<sup>7</sup> See for example King (2012).

These are just a few examples of how the new post-2015 education and skills proposals could affect the character, delivery, and monitoring of development aid projects and programmes. There would be other illustrations from the new requirements of learning in adult literacy or in early childhood care and education. But enough has perhaps been said to suggest that the new goals are likely to put more demands both on countries and their many different development partners.

Many of these assessment approaches and technologies are already in place in Western Europe and North America, but they are the responsibilities of national ministries of education or of qualification authorities or skills councils. Securing some of this existing expertise for the parallel national development agencies and their partners in LICs and LMICs will be crucial.

We shall return to some aspects of these challenges under the last section (6) of this paper, but we move now to consider what have been the financial dimensions of donor engagement with the EFA goals and with the education MDGs.

### **3 - Donor Responses to EFA and the Education-Related MDGs**

#### **Broad trends**

At the World Education Forum in Dakar in 2000 there was agreement that ‘no country seriously committed to education will be thwarted in their achievement of this goal by a lack of resources’ (World Education Forum, 2000). While aid to education increased over the period 2002-2010, as noted below, this has since declined and donor governments have failed to deliver on the Dakar promise.

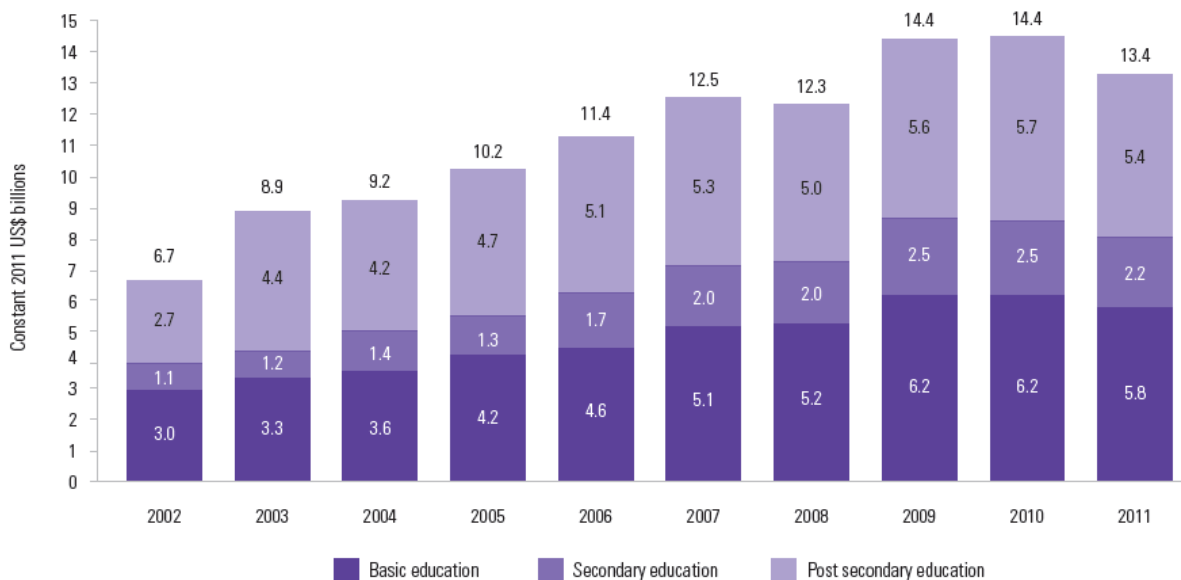
In the decade following Dakar, total aid to education increased steadily from US\$6.7 billion in 2002 to US\$14.4 billion by 2010, with aid to basic education<sup>8</sup> increasing from US\$3 billion to US\$6.2 billion over the same period (Fig 1). It is interesting to note the very high levels of aid to post-secondary education (Fig 1) long after the Jomtien and Dakar agreements. This increase in aid to education more than mirrored increases in total ODA, which rose from US\$ 97 billion in 2002 to US\$139 billion in 2010

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<sup>8</sup> Basic education is defined by the DAC as covering early childhood education, primary education and basic life skills for youth and adults.



Fig. 1. Total aid to education disbursements by US\$ billions, 2002-2011



Source: UNESCO (2013b) using OECD Creditor Reporting System data

However, since 2010 there is concern not only that overall levels of ODA are declining (by 6% in real terms 2010 to 2012 – DESA-UNDP, 2013a), but that levels of aid to education (and basic education) are declining. Between 2010 and 2011, total aid to education declined by 7%, with aid to basic education declining by 6% - from US\$6.2 to US\$5.8 billion (UNESCO, 2013b).

Six of the ten major bilateral donors to basic education (Canada, France, Japan, the Netherlands, Norway and the United States) reduced their aid to basic education between 2010 and 2011 (UNESCO, 2013b: 6). However, other donors (Australia, Germany, Sweden and the United Kingdom) increased their aid to basic education over the same period (ibid), which slightly compensated – but this was insufficient to prevent an overall decline in aid to this level.

With regard to multilateral support for basic education, there is evidence that it is ‘slowing compared to other sectors and to bilateral donors’ (Rose and Steer, 2013: 1-2). For example, between 2010-2011, the European Union ‘decreased the amount given to basic education by almost one-third’ (UNESCO, 2013b: 6).

What is additionally concerning, from the perspective of any increased focus on post-basic education in the post-2015 agenda, is that ODA to both secondary and post-secondary education also fell, but at different rates,<sup>9</sup> between 2010 and 2011. Meanwhile, as noted above, UNESCO has proposed that the post-2015 education agenda should ensure ‘equitable access to quality upper secondary as well as tertiary education’ (UNESCO, 2013a: 7).

Aside from the trend of decreasing ODA to education, another trend among DAC donors is the need to demonstrate more clearly how ODA contributes to development outcomes (*European Report on Development (ERD), 2013*) which has led them ‘to focus more on results, transparency and value for money’<sup>10</sup> (Greenhill and Prizzon, 2012: 9), and to be selective about the countries they provide aid to.

<sup>9</sup> It is secondary that has suffered the most – having the greatest relative decline between 2010 and 2011.

<sup>10</sup> See also *NORRAG News No. 47: Value for money in international education: A new world of results, impacts, and outcomes*. [www.norrag.org](http://www.norrag.org)

## Financing gaps

There remains an annual \$26 billion financing gap to achieve basic education<sup>11</sup> in 46 low-income countries (LICs) and lower-middle-income countries (LMICs) (UNESCO, 2013d). If achieving lower secondary education is added, the financing gap grows to \$38 billion in the same countries. If the post-2015 ambitions extend beyond lower-secondary, which looks likely, and if we were to cost in the financing gap for the remainder of middle- (and even high-) income countries, the global post-2015 education financing gap will be very considerable. And this is without calculating the very substantial costs of the widespread emphasis on quality in most post-2015 education proposals.

There is no realistic way that we should expect such a large financing gap to be covered by ODA alone (Greenhill and Prizzon, 2012). Domestic financing will continue to be the major source of funds for education (Rose and Steer, 2013), but other sources, including from non-DAC donors, the private sector and innovative mechanisms, clearly need to be adopted even for the post-2015 basic education agenda to be realized.

## Shortfalls regarding financing priorities

However, ODA to basic education is not being prioritized to countries that are furthest from achieving EFA (GCE, 2013; UNESCO, 2013a; 2013b); in 2011, only one-third of aid to basic education was allocated to low-income countries (UNESCO, 2013b: 7), and ‘only three of the ten countries in the world with the highest numbers of out-of-school children are among the top ten recipients of aid to basic education: Ethiopia, India and Pakistan’ (ibid: 8).

The Education MDGs have narrowed the focus of ODA to primary education and gender equity (Commonwealth Secretariat, 2012: 9). Nonetheless, over the past decade, several bilateral (France, Germany and Japan) and (more recently) some multilateral agencies (e.g. African Development Bank) have provided significant amounts to students studying in donor countries (which is no longer considered country programmable aid by the OECD); and they have widened their support to a whole sector financing approach (Rose and Steer, 2013; UNESCO, 2012)..

It has been widely claimed that not only has priority been accorded to primary education, but narrowing the education goals has also resulted in a priority being given to educational access, while quality improvements and learning outcomes were much less prioritized. Within ‘quality’, as mentioned above, there has been a focus on its ‘quantification’ by mechanisms such as those associated with Uwezo and the early grade reading assessments.

Lastly, there are more general shortfalls with regard to governments’ financing priorities; massive sums are allocated to military spending versus to education and other services. For example, global military spending reached US\$1.75 trillion in 2012;<sup>12</sup> if just 1% of this were reallocated to education spending, an extra US\$17.5 billion would be available.

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<sup>11</sup> The financing gap that the UNESCO Global Monitoring Report team calculated in 2012 refers only to 3 of the 6 EFA Goals (related to primary, pre-primary and adult literacy). This version of basic education is different from that of the OECD DAC – see footnote 7 above.

<sup>12</sup> [http://www.sipri.org/media/pressreleases/2013/milex\\_launch](http://www.sipri.org/media/pressreleases/2013/milex_launch)

## Shortfalls regarding financing modalities

The shift in the years following Dakar, away from project-based education aid, to sector-wide approaches and budget support seems to be reversing in the last few years. The majority of the Paris Declaration aid effectiveness targets were not met (UNESCO, 2012), and greater risk aversion appears to have affected financing modalities, especially with regard to general budget support (Greenhill and Prizzon, 2012). Several traditional donors, most notably USAID, have long favored project-based aid to education and this does not appear to be changing; if anything, more donors appear to be returning to this modality.<sup>13</sup>

The Global Partnership for Education has been through reform<sup>14</sup> over the last couple of years, but is still finding it hard to engage with the new multi-stakeholder financing reality (especially with regard to getting contributions from emerging donors, the private sector or innovative financing), or indeed to raise much finance (Sachs and Schmidt-Traub, 2013). For example, donor contributions to the Global Fund to Fight AIDS, Tuberculosis and Malaria between 2001-2011 totaled US\$22 billion, ‘around ten times as much as those made to the Global Partnership for Education over a comparable time frame’ (UNESCO, 2012: 153). Further, while private partners around the world are making commitments to achieve the targets of the UN Global Education First Initiative,<sup>15</sup> they are not channeling these resources via the Global Partnership for Education but largely through their own mechanisms which tend not to be aligned with EFA objectives. Some have suggested that the Global Partnership for Education could evolve into a new Global Education Fund (Brown, 2012; Sachs and Schmidt-Traub, 2013).

Since Dakar, financing modalities for EFA have not been able fully to reach the poorest and most marginalized people or countries, including girls, children with disabilities, rural populations, emergency and conflict situations (UNESCO-UNICEF, 2013b).

Traditional aid to education may be at a turning point. In most recipient countries, ODA to education is declining both in absolute terms and as a proportion of national education budgets, the traditional grant focus of some donors is giving way to greater focus on blended financing options (see below). ODA is still very important, especially for fragile states (OECD, 2013b), and will continue to be over the period to 2030. But those countries that have failed to fulfill earlier ODA commitments need to make good on their promises. However, ODA may begin to become more useful as a catalyst for development or as a means to leverage additional funding from national governments and the private sector, and in funding global public goods connected to education (e.g. education data, research). While some suggest that in future ODA ‘should be targeted entirely to low-income countries’ (Sachs and Schmidt-Traub, 2013), it may be that it is more useful to look at it on a country- (or intra-country)-specific basis and also to look at the type of ODA modality used and its purpose.<sup>16</sup>

Even if ODA is not currently well targeted at the countries furthest from EFA, it can still amount to a significant proportion of education budgets in some of the poorest countries. But ODA financing modalities for these countries may need to focus more on grants than loans for example (ERD, 2013). In other countries, we may see less grants and more loans, or else new funding modalities such as blending ODA with private or non-concessional financing (*Ibid*; Greenhill and Prizzon, 2012).

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<sup>13</sup> Perhaps this is as a result of the national audits of sector and general budget support.

<sup>14</sup> For example, widening the focus of its work to include education in fragile states as one of its core priorities.

<sup>15</sup> <http://www.globaleducationfirst.org/commitments.html>

<sup>16</sup> e.g. Why shouldn't ODA be used in lower-middle income countries (MICs) to fund areas that are historically under-invested in, or to leverage increased domestic or private sector investment in similar countries?

The main instrument the MDGs incentivized was ODA from traditional donors, with MDG 8 (on global partnership) perpetuating a 'donor-recipient' type of relationship (DESA-UNDP, 2013a). By contrast, the post-2015 framework needs to *incentivize development finance*,<sup>17</sup> regardless of source. It needs to be emphasized again that domestic financing will be the make-or-break of education post-2015 ambitions and will remain the largest source of education financing in most countries. The EFA GMR is proposing that the post-2015 education goals include a financing goal that contains commitments for governments, donors and others (UNESCO, 2013c); one vital lesson from EFA/MDGs is that it cannot be taken for granted that resources will be available to meet international commitments, despite the pledge given at Dakar.

## 4 - Financing Education Post-2015: Emerging Partners and the Private Sector

In the last decade the development landscape has broadened considerably. While the EFA and education MDGs were more about incentivizing ODA and linked more to a donor-recipient approach (Jones, 2012), the development financing opportunities that now exist go well beyond this. The financing of the post-2015 education agenda needs to also account for this new financing reality that includes emerging donors, private sector financing (foundations, NGOs, large corporations, enterprises and private individuals), new mechanisms for traditional donors, as well as innovative financing **approaches**. We deal with emerging donors next and then the private sector below.

### Emerging, non-DAC donors

There has been a growing interest in the role of the non-DAC donors in the last few years, but so far there has not been much attention accorded to their engagement with education and training, or with their involvement in the debates around the post-2015 education agenda (King, 2013b; 2013c; *NORRAG News* 49). Their preferred aid discourse is captured in the term South-South cooperation (SSC). This stresses collaboration between Southern partners in many different domains. Development assistance is only one dimension of SSC, which 'often combines loans, grants, trade, investment and technical cooperation' (ERD, 2013: 114).

While there continues to be a lack of official figures to allow the isolation of ODA in SSC, it is estimated that currently some \$15 billion in aid is provided each year through SSC and that this could rise to \$50 billion by 2025 (ibid. 115). The best estimate of the much discussed Chinese aid is provided by Brautigam, and would total \$10.5 billion, covering \$2.5 billion of official aid, and \$8.00 billion of concessional foreign aid loans (Brautigam, 2013).

As far as the main non-DAC donors are concerned, their modalities of education cooperation are also framed in a South-South mutual benefit discourse, and their emphasis is largely on higher education, scholarships, teacher training and short term tertiary level training rather than on the EFA agenda and education-related MDGs of many traditional donors.<sup>18</sup> As an important part of the discourse of non-DAC donors is that training should provide direct exposure to their own recent, successful experience of rapid development, it should not be surprising that short-term training in the non-DAC donor countries is a very high priority. Indeed along with Japan and Germany, India and China are now two of the four largest providers in the world of such short-term training.

Africa is the site for a good deal of the higher education cooperation of India, China, Brazil, and of course South Africa which subsidises thousands of students from the rest of Africa in its own universities and colleges. It

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<sup>17</sup> Development finance here refers to finance that is used for development purposes that includes, for example, financing from ODA, south-south cooperation, triangular cooperation, innovative mechanisms, and the private sector.

<sup>18</sup> There is some non-DAC donor support (e.g. China) to school building but this is tiny compared to that of Japan, for instance.

should be noted that the education ministers of the BRICS countries met on the margins of the UNESCO General Conference on 5<sup>th</sup> November 2013, and ‘agreed to establish a mechanism at the “highest political and technical level” to coordinate and implement collaboration, especially in higher education’ (Lee, 2013).

Although the ministers did also emphasise the importance of collaborating with UNESCO to ‘hasten progress towards achieving Education for All – EFA – goals, and also to shape discussions on the post-2015 agenda’ (ibid), it should be noted that until recently China, India and South Africa have paid little attention to this last. This is beginning to change, with a recent high-level ‘Workshop on the post-2015 development agenda on post-school education & training’ in South Africa on 30<sup>th</sup> October 2013 (DHET, 2013). In the case of China, its Ministry of Foreign Affairs published ‘China’s position paper on the development agenda beyond 2015’ just three days before the UN General Assembly debated this issue in September 2013 (MOFA, 2013).

## Private sector

While basic education is seen largely as a ‘public good’ (Carol Bellamy in Brookings, 2012: 67), which should mostly be publicly financed at the national level, the pressure on ODA means that many are increasingly looking to the private sector as a potential source of finance for education (UNESCO, 2012). The private sector certainly has an important role to play in financing education post-2015 – and not just in financing provision, but also ‘to catalyse innovation, advance policy reform and address the education needs of marginalized populations’ (UNESCO, 2012: 164; 2013e: 1; UNESCO-UNICEF, 2013a). Below we examine briefly four types of private sector financing: Philanthropy/private grants and NGOs; Private multi-national corporations; Private enterprise at national levels; and, Private education and training providers.

## Philanthropy, private grants and NGOs

Key foundations based in DAC-member countries spend US\$135 million on education in developing countries (UNESCO, 2012; van Fleet, 2012); this is equivalent to only about 1% of education aid from DAC donors. About 90% of education support from these foundations comes from just five organisations which are based in USA (ibid.).<sup>19</sup> These figures, however, are likely to be underestimates as they don’t include comparator organisations in emerging economies such as the Qatar Foundation and Dubai Cares, nor do they include the Aga Khan Foundation. Of course, from the proposed post-2015 perspective of universality (to both developed and developing countries), these figures also don’t include expenditure by private foundations on education in developed countries, including for example the Bill and Melinda Gates Foundation spending on education in the USA.

The delivery of funding from such philanthropic organisations is ‘generally the most comparable to aid from DAC donors... [They] rarely run their own projects but instead channel their funds to other organizations, usually local or international NGOs’ (UNESCO, 2012: 165). However, foundations (more so than traditional donors) ‘have also taken on more risky ‘venture capital’-style investment, and tend to have a strong focus on innovation and scientific research’ (Greenhill and Prizzon, 2012: 12).

Non-governmental organizations’ contribution to education financing is also significant; NGOs get their financing both from ODA, but also from their own fund-raising activities.

Private individuals are also increasingly becoming involved in directly financing development, including education, through such mechanisms as social impact investing and peer-to-peer giving and lending.

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<sup>19</sup> Ford Foundation, William and Flora Hewlett Foundation, MasterCard Foundation, Open Society Foundations, Carnegie Corporation of New York.

## Private multi-national corporations

Private corporations based in Western Europe and North America provide an estimated US\$548 million per year to support education in developing countries (UNESCO, 2012; van Fleet, 2012); this is equivalent to about 4% of education aid from DAC donors. Most of these companies are in the energy and ICT sectors. The motivation behind such involvement 'differs widely in terms of how closely it is tied to core business activities' (UNESCO, 2012: 165). There are broadly three types of such giving (UNESCO, 2012):

- 'corporate giving' - contributions towards education in developing countries through grants to NGOs or international organizations
- 'social investments' - in sectors such as education as a form of corporate social responsibility.
- 'supply of goods and services' – for example via a partnership with a government.

There is some concern that private multi-national corporations tend to focus more on some countries and some sub-sectors of education rather than others, and are not necessarily aligned with government policies.

## Private enterprise at national levels

Corporate involvement in education at the national level should also be recognized as part of the post-2015 education financing matrix. Such involvement may include grants to national education initiatives as part of their corporate social responsibility. But private enterprises are much more directly involved than this. When it comes to skills training, for example, many enterprises, both formal and informal, large and small, are engaged in enterprise-based training, including through apprenticeship arrangements, or they might be contributors to national or sector industry training funds. Private enterprises at the national level also have a key role to play in helping education and skills planners understand changing labour market demand and skill needs (UNESCO-UNICEF, 2013a). This all has obvious links back into EFA goal 3, but also to the wider discussions on skills for work as part of the post-2015 agenda.

## Private education and training providers

At the level of the provider, private institutes and schools – both for- and not-for-profit – have a role to play in financing education now and post-2015. The role that, for example, low-fee private schools are playing in EFA – and might play post-2015, is contentious.<sup>20</sup> In almost every country there are also many examples of for-profit and non-profit schools and training centres that provide education and skills training, as well as the very widespread 'shadow' school systems which offer private provision to students who have already had a full day or week of public schooling.

## 5 - Innovative Financing for Education Post-2015

As is has been argued above, most visions of education post-2015 are considerably more ambitious than the current EFA agenda. Given that it is already difficult, as we have shown, to source the required external financing for EFA, education financing post-2015 has to be altogether different.

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<sup>20</sup> For a summary of the arguments for and against low-fee private schools, see the blog debate between Kevin Watkins and Justin Sandefur at <http://www.oxfamblogs.org/fp2p/?p=11264>

Innovative financing<sup>21</sup> approaches may have the potential to complement other sources of external finance, including ODA, and to raise significant amounts of funds (Jones, 2012); however, such approaches should not detract attention from the importance of the need for donor governments to fulfil pledges made at the Dakar Education Forum in 2000, nor of the need for domestic resources to be increased and to be used more effectively.

## Possible innovative financing modalities for education post-2015

Innovative financing for education can cover three main purposes – all of which are relevant for the post-2015 education agenda; i) to help raise additional finance for a more ambitious educational agenda; ii) to raise political and public awareness of education; and, iii) to promote a culture of innovation and improved outcomes in the education sector. The following are some examples of all three approaches.

**Special Drawing Rights (SDRs)** - Proposals related to the exploitation of SDRs appear to have the largest revenue potential for development (*ERD*, 2013). SDRs are the IMF's main funding instrument; they are loans or grants guaranteed by the member countries of the IMF. It could be possible to allocate a certain share of SDRs to social sectors (including education) thereby providing effectively budget support to countries. This would require the support of the IMF board which have traditionally resisted earmarking IMF funds.

**Financial transaction tax (FTT)** – As a source of financing for development the use of FTT is highly controversial (World Bank, 2013). An FTT is set to be adopted by 11 EU states<sup>22</sup> and is expected to yield US\$47 billion a year in revenue.<sup>23</sup> If half of this could be dedicated to international development and just 10% of this then allocated to education, this would result in additional revenue of US\$2.4 billion per year for education. If the FTT were widened to include all G20 countries, the revenue generated would be even more. However, initial indications regarding the EU FTT as a source of financing for development, including for education, are that it is likely that 'only a fraction of [FTT]... proceeds [will]... be allocated to development outside the region' (World Bank, 2013: 37). Nonetheless, given that the post-2015 agenda is expected to be universal, perhaps a proportion of the EU FTT could be channelled to improving education in participating EU states.

**International education bonds** - In this proposal, finance would be raised by selling bonds in international capital markets, thus providing immediate cash resources, and donor governments would make long-term (e.g. 10 years) pledges to repay these education bonds. A ten year bond would improve predictability of financing and allow countries to take on long term commitments such as recruiting and training new teachers. Such bonds are not yet used for education, but are already used for the health sector - issued by the International Finance Facility for Immunization (*IFFIm*), and used by the Global Alliance for Vaccines and Immunizations (*GAVI*) (Burnett and Bermingham, 2010; UNESCO, 2011a).

**Domestic (local currency) education bonds** could also be issued by individual countries more effectively to make use of domestic resources, especially those being held in pension funds (there is an estimated \$1 trillion held in pension funds in developing countries) (LGIFD, 2010).

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<sup>21</sup> For general information about innovative financing, see the Leading Group on Innovative Financing for Development (LGIFD) website – [www.leadinggroup.org](http://www.leadinggroup.org). They co-organized a side event on innovative financing for development in the implementation of the post-2015 Development Agenda, on the margins of the United Nations General Assembly (September 2013).

<sup>22</sup> These 11 include: Germany, France, Italy, Spain, Austria, Portugal, Belgium, Estonia, Greece, Slovakia and Slovenia. The UK is not part of this agreement.

<sup>23</sup> [http://leadinggroup.org/IMG/pdf/A\\_key\\_tax\\_to\\_address\\_global\\_challenges.pdf](http://leadinggroup.org/IMG/pdf/A_key_tax_to_address_global_challenges.pdf)

**Diaspora bonds for education** – In this proposal, which is not yet active in the education sector, bonds would be issued targeted at diaspora communities, with the funds used to support education (Burnett and Bermingham, 2010; LGIFD, 2010, 2012; World Bank, 2013).

**Debt-for-Education swaps** – These are where a country’s external debt is (part) cancelled in exchange for that debtor government’s commitment to mobilize domestic resources for education spending. Debt-for-education swaps have been used by quite a number of Latin American debtor nations (Burnett and Bermingham, 2010; LGIFD, 2010; SDSN, 2013; UNESCO, 2011b).

**Debt conversion development bonds for education** – A debt-for-education swap is negotiated, and the fiscal space created is used by the government to issue a new local currency bond, thereby front-loading the benefit of the debt swap. As the new bond is in local currency, this mechanism has the added benefit of not having to use foreign currency reserves to pay back a foreign loan (Bond, 2013; LGIFD, 212; UNESCO, 2011b).

**A (PRODUCT) RED for education** – Just as (PRODUCT) RED<sup>24</sup> is used to generate awareness and funding for HIV/AIDS prevention and treatment, a similar market mechanism might be developed for education.

**International solidarity levy mechanisms** – voluntary micro-donations from private individuals on bank transactions, air tickets, hotel bookings and mobile phone calls might be developed for the education sector. They can be useful for both raising awareness of education, as well as financing (Burnett and Bermingham, 2010; LGIFD, 2010; UNESCO, 2011a).

## Suitability of innovative mechanisms for financing education post-2015

- Debt-for-Education swaps are more suited to middle-income countries, since many low-income countries do not have much debt (as a result of the Heavily Indebted Poor Countries Initiative and other initiatives) (Burnett, 2013).
- Domestic bond issuances require there to be functioning local bond markets, which remain underdeveloped in many countries (DESA-UNDP, 2013a), and often non-functioning in many conflict and fragile states.
- Bond mechanisms are generally more suited to raising revenue for capital projects, where funds are needed up front (e.g. to finance education for large refugee populations), or to fund education sub-sectors that have clear revenue streams (‘which tend to be vocational and higher education where fees are common’ - Burnett, 2013). But they are not very suited for covering recurrent expenditures like teacher salaries.
- Middle-income emerging economies have much larger pension funds than low-income countries, meaning that mechanisms such as local currency development bonds are more suited for MICs rather than LICs.
- Innovative financing mechanisms might be helpful if aimed at providing additionality to areas that are important but completely underfinanced since governments are obliged to give priority to funding teachers.

## Innovative financing approaches to promote innovation and improved performance in the education sector

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<sup>24</sup> The (PRODUCT) RED initiative involves private companies creating RED-branded products, the profits from which support the Global Fund to Fight AIDS, Tuberculosis and Malaria. <http://www.red.org/en/>



Innovative financing is not just about approaches to raise more funds in atypical ways, it 'is also about getting funds to the right place at the right time' (Durstun, 2013) to promote innovation and results.

Bilateral and multilateral agencies are increasingly trying out new instruments that allow for more efficient delivery of financing, such as results-based financing. For example, DFID are piloting the use of Cash-on-Delivery aid in the education sector in Ethiopia; DFID will make payment to Ethiopia's Ministry of Education based on the number of students who sit or pass the national grade 10 examination (DFID, 2011; UNESCO, 2012). Meanwhile the World Bank's Programming-for-Results instrument disburses loans to countries once results are achieved.

Another example is the use of conditional cash transfers in education, which have been shown to increase enrolment rates in projects in Latin America (SDSN, 2013).

## **An Education Venture Fund**

There are many different possible approaches to innovative financing for education and in order to remove the need to create numerous new entities each with its own fixed costs, a single pooling mechanism, such as an Education Venture Fund has been proposed by some (LGIFD, 2012). The Education Venture Fund would adopt a 'social venture capital' approach to raise new financing and promote innovation and results in the education sector.

While innovative financing is by no means a panacea for financing education post-2015, and while it is recognised that education financing must come primarily from domestic resources, innovative financing certainly offers some useful approaches that can be adopted to increase funding (Greenhill and Prizzon, 2012), awareness and to improve innovation and outcomes.

It is not possible yet to assess the outcomes of almost all the above mechanisms for raising resources for education via innovative approaches, since only debt-for-education swaps has so far been implemented. The appetite for adopting innovative financing approaches for education is somewhat less than adopting such approaches for other sectors, especially health. This is perhaps partly due to the long time horizon between investing in education and seeing impact (increased incomes, smaller families etc.) versus investing in vaccines and seeing relatively quick results.

## **6 - The Aid Effectiveness and Post-2015 Education Agenda**

This short paper has pointed to a range of different views/visions/proposals of the post-2015 education agenda, illustrated in the several proposals to finish the existing EFA Dakar commitments, while broadening and expanding them, and also to ensure that they represent a genuinely global, one-world approach. It has also pointed to a diversity of financing mechanisms for post-2015 which acknowledge the continuing importance of ODA, but which go 'beyond aid'. A powerful case for increased collective action, coordination, and coherence across these various instruments and development actors has been made by reports such as the *European Report on Development 2013* which is very directly focused on the aid effectiveness challenges of education post-2015.

Our focus in this last section, given the multiplicity of different proposals, financing mechanisms, and development actors, is to acknowledge that, while there are severe limits to greater coordination in a climate of reduced funding, there is a strong case for considering the evidence base of the apparently competing post-

2015 proposals and approaches in front of us.<sup>25</sup> This is why it is so valuable that the HLP has underlined the importance of a 'data revolution'. However, there is already a good deal of robust data on the vital importance of quality education, early childhood, adult literacy, skills development, equity and good educational governance. Arguably, we know more than enough about these central topics, and from more than a decade of 'lessons learned' from EFA experience.<sup>26</sup> But a key factor continues to be the educational priorities of governments in rapidly changing socio-economic contexts, and of the educated elites who have already profited from a full basic education.

Despite this existing evidence base for the impacts of all these themes on successful achievement, there are still almost 774 million illiterate adults outside the OECD countries. In the face of decades of evidence on the influence of early childhood care and education on later learning and even on working, the pre-primary gross enrolment ratio in low income countries was only 15% in 2010, and in some of the poorer countries in Sub-Saharan Africa less than 1% of the education budget is allocated to this sub-sector (UNESCO, 2012: 54). Even in the formal primary school system, the fine language of EFA Goal 6 on the 'quality of education' and 'excellence of all' has not prevented 250 million out of 650 million children of primary school age from reaching grade 4 or from learning the basics. For Sub-Saharan Africa, Fredriksen has repeatedly shown that with only 2/3 of primary children reaching the final grade since the mid-1970s, one-third of the labour force in SSA will be illiterate in the 2030s and 2040s, and more than one-third of the children will be borne to illiterate mothers with all the negative implications that this entails (Fredriksen, 2013a; 2013b). Despite dangerously high levels of youth unemployment in richer countries, and massive engagement by young people in precarious work in the informal sectors of poorer countries, internationally comparable indicators of skills development will not be available before 2015 (UNESCO, 2012: 80).

Regardless of the promotion by the HLP of a data revolution or the World Bank's first comprehensive overview of its knowledge work since the *WDR: Knowledge for Development* (1998/9), research knowledge about education and skills development continues to be taken less seriously and to be funded much less generously than knowledge about health, as already noted above (World Bank, 2011).<sup>27</sup>

It is perhaps a paradox but at the very point where many agencies are emphasizing the key role of value for money in development aid and of results-based aid, the technical capacity and expertise of many funding agencies, both bilateral and multilateral, has been falling. This parallels a second paradox that education systems in many of the countries furthest from EA have such a low capacity to learn and innovate, be it to improve management and accountability, pilot and innovate to develop policies and programmes adapted to local conditions, or apply new technologies to improve learning. With the new post-2015 education agenda likely to be much more demanding than the two education-related MDGs, there must continue to be considerable implementation and monitoring concerns.

There are clearly some education and skills themes which are shared amongst many countries, North and South, for example the ranking of educational achievement as in the Programme for International Student Achievement (PISA), or the world-wide university ranking systems. But in many other areas, such as the 57 million and 69 million young people not attending primary and secondary school respectively, or the sheer numbers of adult illiterates (774 million) outside the OECD countries, there is a sense of a different order of magnitude, North and South. The attempt by the HLP, for example, to discuss young people not in education, employment or training (NEETs), a UK concept, as if it could be a one-world theme was seen by some as a

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<sup>25</sup> The forthcoming NORRAG Working Paper, 'The research base of education and skills post-2015' (December 2013), will illustrate this further. See [www.norrag.org](http://www.norrag.org)

<sup>26</sup> See for example on early childhood development, van der Gaag and Tan (1998)

<sup>27</sup> Interestingly, neither Education nor Health is included in the six new Knowledge Platforms (Ibid. 8).

failure, as was its example of ‘Potential Impact’ in proposing ‘470 million more workers with good jobs and livelihoods’ (HLP, 2013: 28-9).<sup>28</sup>

The *European Report on Development, 2013* argues, in this connection, that ‘Although a universal framework has an instinctive and obvious appeal, it is likely to be very difficult to devise and negotiate goals and targets that would be both universally acceptable and relevant for diverse contexts. Certain goals would have to be more challenging for some countries than for others’ (*ERD, 2013: 219*). Compared to the last time, following the agreement on the Millennium Declaration, in 2000 when the MDGs were not agreed by consensus but by a small group of international officials, it will be extraordinarily difficult in the next several months to translate all the different streams of thinking about education and skills goals into robust, acceptable goals that are open to ease of monitoring at the country and international levels. This concern applies to all the key terms in the current set of education goals such as: ‘good quality’, ‘learning goals’, ‘skills’, and ‘equity’.

To take just one example of the monitoring challenge from the world of skills: there are already a whole range of widely differing uses of ‘skills’ in proposed targets concerned with preparation for life or for work. Thus the HLP (op.cit. 49) talks of ‘skills, including technical and vocational, needed for work’; UNESCO at the General Conference of 2013 proposed ‘equitable access to lifelong learning opportunities to develop skills and competencies for life and work and towards fostering of personal and professional development’ (UNESCO, 2013a: para 41); the LMTF Recommendations have multiple examples of skills, but not once ‘technical and vocational’; and finally the SDSN does refer to vocational skills, but admits they are ‘not systematically assessed’ (SDSN, 2013: 16). This is just a microcosm of a challenge that will apply to many of the targets of any over-arching education and skills goal.

## In conclusion

Within Western European and North American countries, there is a wide range of development actors, at international, national, sub-national and city levels, including national and international NGOs, think tanks, corporations, foundations, private sector providers, philanthropists and consultancies. We have only been able to refer to a sub-set of this very diverse constituency in their involvement in post-2015 debates and proposals. Not only is there a multiplicity of providers, but even within the limited field of possible education and skills development goals and targets, there is a substantial range of different approaches. Any viable post-2015 framework for development cooperation in education will need to recognise the distinct roles of different types of cooperation actors.

However, it may still be useful for these diverse actors to recall just how complex the funding and definitional issues are that derive from this discussion about post-2015 proposals:

There are several next steps or conclusions from this brief paper. They involve greater certainty about the meanings, the evidence base and the options involved in different post-2015 proposals.

Clarifying the meanings and practical implications of such key elements in many post-2015 education proposals as ‘quality’, ‘equity’, and ‘skills’, including ‘skills for work’.

Recognising that ‘finishing the job’, even on the specified limits of some of the 6 EFA Dakar Goals in 46 LICs and LMICs, would cost more than the estimated annual funding gap of \$26 billion (which is based on just 3 Goals, - early childhood, primary and adult literacy).

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<sup>28</sup> See blogs on the HLP by McGrath (2013) and King (2013a).

Expanding the ambition of the existing 6 Goals so that there is comprehensive coverage, not just 50% adult literacy or increased coverage of ECCE, and not just minimalist learning outcomes but real attention to quality, would increase the annual funding gap dramatically.

Expanding the range of the present EFA goals so that they incorporate universal access to lower secondary education of acceptable quality would increase the current annual funding gap even further.

Expanding 'Education beyond 2015' to take in 'equitable access to quality upper secondary and tertiary education' would make enormous demands on both domestic funding and on aid budgets even for the 46 LICs and LMICs discussed in this paper in relation to the \$26 billion.

It would nevertheless be invaluable for the development assistance community to have some sense of the differential costs of meeting these very different ambitions, with different funding scenarios, including 0.7% of GNP for those countries already committed to that target.

The development assistance community will never be able to fund these further ambitions; the key to funding the post-2015 ambitions must be increased domestic financing. That does not mean that DAC donors should not still aspire to the 0.7%, but rather that DAC ODA might increasingly be better used in other ways – e.g. leveraging additional domestic financing, joining with non-DAC donors, financing from the private sector or from innovative instruments, or for funding global public goods in education like the called-for data revolution, or measurement of learning outcomes. More attention, in particular, should be given to exploring and piloting various innovative financing for education approaches.

Western European and North American countries, recognizing that they will not be able to fund these enormous gaps, should consider getting together to discuss what their funding priorities and modalities should be, given their constraints and evidence on where aid can be most effective in advancing equity in education and training. This is increasingly becoming a key objective of ODA.

Lastly, Western European and North American countries will need to address the implications of their involvement in a post-2015 education and skills agenda when it comes to the issue of universality. The UN Secretary General made it clear in his September 2013 Report, *A Life of Dignity for All*, that no one should be left behind in developed and in developing countries.

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