

**SOUTH-SOUTH COOPERATION
IN EDUCATION
AND DEVELOPMENT**

Edited by

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Teachers College
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HSRC Press
Cape Town, South Africa

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ONE

Introduction**Rhetoric, Realities, and Reasons***Linda Chisholm*

This book emerged from a collaborative effort to understand why South–South cooperation has suddenly entered the talk of major international donors in educational development. When we started the project, South–South cooperation had just started to become a new slogan. But it was also clear that Northern agencies and donors were playing an increasingly powerful role in determining global and national educational agendas and were themselves engaged in promoting South–South transfer and cooperation. How did these two issues square up, and what does South–South cooperation mean in this context? Although we, as coeditors of this book, firmly believe in the value of institutional and individual cooperation across borders and boundaries, we were skeptical about the contemporary uses of the term and wanted to explore a more critical approach than that found in much of the development literature.

We approached the topic from different angles. One of us is based in South Africa, and has had an abiding interest in relationships of educational inequality within and between nations, and how these have changed over time, both generally and in particular contexts, such as southern and eastern Africa. From this perspective, South–South cooperation can be seen as a form of collective organization to undertake activities that will improve countries' unequal position on a global scale. But it is likely to reflect inequalities within and between countries at the same time that it promotes overcoming inequalities. The other is based in the United States and has been intrigued for years about the proliferation of "traveling reforms," that is, educational reforms that are uncritically transferred or transplanted from one continent to another. Fueling into globalization research in education, the study of transnational policy transfer has lent itself to investigating the reasons, actors, and consequences of reforms that, in most cases, travel from the North to the South. From the angle of policy

India, and, to put it bluntly, in South Africa—against the romantic view that both South Africans and Indians exist in a new world of civility and mutuality, is of consequence in shaping the terms of the terrain of transfer. The ways in which these local attitudes condition the nature of each group's participation in these local spaces is important to recognize and to begin to understand who has been selected as the objects of the study and who has been entitled to analyze them.

In terms of this explanation, I am arguing, therefore, for an approach that recognizes how power relations are reconstituted in contact situations to yield instances of domination and subordination that are not amenable to easy reading. What is not addressed, in both the case studies discussed in this chapter, is how these factors, in the process of managing transfer, are of consequence. I am suggesting that, in relations between India and South Africa, we need to be aware of the ways in which privilege is reconstituted at new levels. Important in making sense of this is understanding how the process of knowledge transfer works with the factors determining privilege and beginning to ask how those involved in those processes themselves are able to deconstruct their positions inside of those situations. In neither project has that stage yet been reached. This constitutes an important area for further investigation in knowledge transfer study.

Conclusion

A Way Out from the Dependency Trap in Educational Development?

Gita Steiner-Khamsi

Social researchers have good reasons for being both fascinated by, and skeptical of, concepts that suddenly enter popular speech. Excessive use detaches ideas from their original context, as they take on entirely different meanings. These meanings depend upon the identity of the speakers and—perhaps more importantly—the audience. Like the term *globalization* that preceded it, the term *South-South cooperation* means different things to different individuals and institutions. These groups continuously update or adapt their definition in response to new political, social, and economic realities. Skeptics, however, are quick to point out that the idea of South-South cooperation is not new. It can be dated back to the post-colonial period of the Cold War, or even, as I would like to suggest, to the colonial period itself.¹

One can argue that countries that are exploited and deemed peripheral have always collaborated with one another. Core countries supported cultural, social, and technological cooperation among peripheral countries as a means to legitimize centrally organized political and economic power. Whether we accept the formation of the Non-Aligned Movement at the Bandung Conference in 1955 in response to U.S. and Soviet domination (see Chapter 3 by Moraes de Sá e Silva) as the first signpost of South-South cooperation, or the transnational alliances between oppressed groups during the colonial era, it would be absurd to claim that South-South cooperation is either new or funded by only a few states. Although skeptics argue that South-South cooperation is merely a myth created by the global North to appease the South, the authors in this book believe it is vital to examine the context in which it reemerged, the actors who have advocated it, and the impact it has had on development work. Ultimately, we are interested in learning whether South-South cooperation has

replaced earlier, asymmetrical forms of cooperation, and if it is a way out of the dependency trap in educational development.

WHY NOW?

Several scholars have argued convincingly that to understand the receptiveness toward new ideas, we must investigate the changes, context, or environment of the country where they are promulgated. Similar to David Phillips's theory of cross-national attraction (Phillips, 2004; see also Ertl, 2006), and Jürgen Schriewer's consideration of the "socio-logic" of external references (Schriewer, 1990; Schriewer & Martinez, 2004), I have scrutinized policy constellations to understand why reforms are borrowed from elsewhere. I also examine how policy-makers generate pressure for reform by referring to "globalization" or vaguely defined "international standards" (Steiner-Khamsi, 2004c; Steiner-Khamsi & Stolpe, 2006). In my study, a protracted policy constellation emerged around a contested issue at the local level that explained why "traveling reforms," or reforms from elsewhere, resonated in the domestic context. In these particular moments, policy borrowing had a salutary effect on the protracted policy conflict. This method of inquiry, embedded in system theory (Niklas Luhmann), emphasizes local contexts and changed environments. Within this interpretive framework, a concept such as South-South cooperation resonates because it appears, or rather, is presented as, a solution to new problems. As a corollary for understanding the general acceptance of the concept of South-South cooperation, one must identify areas that are perceived as new challenges or problems. By asking how the "aid" environment has changed in recent years, who the new donors are, and what their logic is, we can understand why South-South cooperation is currently presented as a panacea in development work.

There has been unprecedented growth and diversification in funding sources for international projects in the past few years. It is ironic that precisely at the moment when all multilateral donors (UN organizations, World Bank, and so forth) and bilateral donors (U.S. Agency for International Development, U.K. Department for International Development, and so on) have finally been brought in line to provide only loans and grants to low-income countries if certain rigorous conditions are met, a new class of "unruly donors" has emerged. These donors—philanthropists, businesspeople, and celebrities—do not abide by international agreements, such as Education for All (EFA), the Millennium Development Goals (MDG), or the Indicative Framework of the EFA-Fast Track Initiative. They are also not concerned with what the education sector strategies of donor-

recipient governments promise to accomplish over the next 5, 7, or 10 years. Their decisions are guided by encounters with statesmen and peers at the Economic Forum in Davos and on Wall Street, rather than by international agreements reached in Jomtien, Dakar, Monterrey, or Washington. Although "unruly donors" are given little attention in development studies literature, the significance of their emergence should not be underestimated.

At the end of 2006, the Bill and Melinda Gates Foundation had US\$33 billion in endowment assets for charitable activities (Gates Foundation, 2007). Having been developed from the income of just two men—Bill Gates and Warren Buffett—the foundation plans to disburse US\$3.2 billion a year by 2009. This amount equals one-third of the US\$9.8 billion that the U.S. government, with a population of more than 300 million taxpayers, thought it could afford annually for USAID. The volume of aid provided by newly emerging philanthropies, such as the Gates Foundation, is—with the exception of the Official Development Assistance (ODA) of the United States, Japan, United Kingdom, France, Germany, and Sweden—greater than the ODA of any other loan- and grant-providing government (OECD, 2007). It is also several times the amount donated by earlier philanthropists, including the Rockefeller Foundation established in 1913 (endowment of US\$3.4 billion), and the Open Society Institute established by George Soros in 1979 (average annual giving of US\$400 million). Arguably, the size of the endowments of newly established philanthropies reflects the widening gap between the extraordinarily rich and the extremely poor.

The influence of individuals or businesspeople on aid priorities, entirely detached from governments' foreign-policy goals, is not only manifested in philanthropies. It has become fashionable for celebrities and other public figures to donate money to people they consider to be "the neediest," especially if the media cover their donations with much glamour and fanfare (see *Vanity Fair*, 2007). The willingness to donate has also trickled down to the individual consumer. Arguably, the glamorization of aid goes hand in hand with the commercialization of aid. The licensing of Bono's product Red Initiative to American Express, Apple, Converse, Emporio Armani, Gap, Hallmark, and Motorola is perhaps indicative of a new era in which it has become profitable for businesses to get involved in charity. By the end of 2007, however, the dollar amount spent on publicity for Red still exceeded the donations made for the Global Fund to fight AIDS, tuberculosis and malaria, and to raise public awareness about HIV/AIDS in Africa (Global Fund, 2007). However, as these examples demonstrate, a new class of donors, composed of philanthropists, businesspeople, and celebrities, has emerged.

Some new donors do follow the script established by the Millennium Development Goals (MDGs), but they are a minority. The UN Millennium Villages project, managed by the Earth Institute at Columbia University and directed by Professor Jeffrey Sachs, is an exception to the rule in that it does commit itself to the MDGs. It is a public-private partnership that includes sponsors such as the United Nations Development Programme; celebrities such as Bono, Madonna, Brad Pitt, and Angelina Jolie; as well as philanthropies, exemplified by George Soros's recent pledge of \$50 million. These new types of donations are distinct in being almost exclusively channeled into health and, to a smaller extent, education projects in Africa. Another new phenomenon, perhaps unique to U.S. foreign policy, is the militarization of economic and humanitarian aid in conflict zones.²

These new donors (aside from the military) see themselves as cosmopolites representing global capital and a global community, rather than their governments in the North. Unlike conventional bilateral and multilateral donors, their donations are not linked to foreign-policy priorities, nor are they contingent on specific conditions that the recipient governments must fulfill (e.g., structural adjustment, poverty alleviation, good governance). South-South cooperation and other debates within the field of development studies are irrelevant to them: They give as they please. Given that governments closely tie their loans and grants to foreign-policy goals, multilaterals make assistance contingent on specific conditions (structural adjustment, poverty alleviation, good governance), and international agreements such as EFA and MDG are biased in their exclusive focus on primary school education, philanthropies may be the last glimmer of hope for aid. Not being part of the "cartel of good intentions" (Easterly, 2002) can be beneficial for individuals and institutions that receive funding from philanthropies. They fill the void left behind in international and bilateral agreements.

Nevertheless, some of the new forms of giving are not only ineffective, but harmful for development. However, since they operate in a vacuum of accountability, they are exempt from professional and academic scrutiny. This is not the case for governments and their bilateral and multilateral agencies, which are held accountable by their constituents and competitors. Conventional donors are in the position of having to reinvent themselves continuously and they are pressed to reflect on their mistakes. Today, international organizations emphasize lesson-drawing, that is, learning from "good practices" or "best-practices" that they have already funded in the global South, to influence national reform more effectively. This is the motivation for their emphasis on South-South collaboration.

THE STANDARDIZATION OF AID

South-South cooperation has resonated with the conventional donors, at least rhetorically, for one particular reason: Aid has become standardized. The means that governments in the global South use to achieve the standards or targets established by the North have become secondary. The new logic of the conventional donors consists of rigorous enforcement of international benchmarks for development, along with verbal acknowledgment of national ownership over reforms that help achieve internationally established standards.

From the first international agreement, Education for All (1990), to the EFA-Fast Track Initiative (2002), which prescribes how educational systems must be reformed to achieve universal primary completion by 2015, governments receiving ODA loans or grants have had less room to maneuver. Since the direction, content, or reform "package" is predetermined by international agreements, latecomers in development are encouraged to learn from, cooperate with, or adopt "best-practices" from early adopters situated in the global South. Benchmark-oriented reforms are coercive in terms of content and the timeline of reform. However, they are discrete when it comes to choosing appropriate strategies for achieving benchmarks. Constant monitoring and evaluation is a feature of this new donor logic, because it enables international donors to stay involved. Despite the assurance of national ownership, the establishment of annual targets enables international donors to keep governments in line if the donors find that the governments did a poor job in implementing reforms.

Donors have set up knowledge banks as an elaborate apparatus for developing country-specific benchmarks. In the education sector, the World Bank has taken the lead in developing and drawing upon its knowledge bank to influence national reforms. In an era of evidence-based educational policy research and policy-making, knowledge banks constitute more sophisticated versions of databanks. They include data on the educational, economic, and social development of a country, and comprise a package of reform ideas or "best-practices" that have already been tested in other ODA recipient countries. Most grant proposals to multilateral organizations refer to a crisis, outlined with an abundance of statistical information, followed by ideas on how to remedy said crisis through the adoption of "best-practices" such as EMIS (Education Management Information System), pro capita financing, outcomes-based education, standardized student assessment, and a host of other traveling reforms funded by multilateral organizations.

Educational statistics provide the foundation for the standardized approach to assessing development needs and targeting aid outcomes.

Unsurprisingly, in recent years, every international organization, including international nongovernmental organizations, has established its own databank with indices that measure regress or progress in categories such as children's rights and economic stability in the areas where they intervene. Indices, ranging from 0 to 1, or from 0 to 100, enable cross-national comparison and the construction of league tables. Naming, shaming, and ranking have become powerful tools to generate or alleviate reform pressure. At the same time, UNESCO's resurgence in the international arena can be, to some extent, attributed to its regained capacity for collecting and analyzing data (see Heyneman, 1999; Cussó, 2006; see also Cussó & D'Amico, 2005), or monitoring progress toward Millennium Development Goals.

The development of knowledge banks is also significant. The concept of an international knowledge bank was first discussed by the Board of Governors of the World Bank in March 1996 (Jones, 2004; Jones with Coleman, 2005). One of the options considered was whether financial lending operations should be delegated to regional development banks (Asian Development Bank, African Development Bank, and so forth), while the Bank itself focused on the lending of ideas. Three years later, in 1999, the World Bank's Global Development Network (GDN) was launched at a conference in Bonn (see Stone, 2000). The idea was to treat local best-practices as a "public good" (Stiglitz, 2000, p. 29) and make them globally available. As a result, policy transfer would ideally occur within and among the countries of the South, replacing the practice of transplanting reform packages from the First to the Third World. Although the World Bank has maintained its financial role, it has also increasingly, during the past decade, acted as a global monitor and lender of "best-practices."

The World Bank has not been alone in constructing and using international knowledge banks to gain leverage at the national level. As mentioned earlier, other international organizations, such as Transparency International in the general public sector or UNESCO (with its annual *Global Monitoring Report*) in the educational sector, have followed suit by acknowledging that monitoring national development against internationally set standards is a powerful strategy for influencing national policy. Used as an advocacy tool, the ranking and scoring of nations along specific indices generates far greater reform pressure on low-income countries than more conventional strategies such as making grants and loans contingent on externally imposed conditions (structural adjustment, poverty alleviation, good governance). The previous approach of imposing conditionalities externally has been rendered obsolete by more subtle strategies of inducing reform pressure from within. In retrospect, imposing conditions on ODA recipients, a practice that was in place for over 20 years, not only

makes donors look bad, but also fails to accelerate reform. In ODA recipient countries benchmark-oriented reforms may be even more coercive. However, unlike earlier approaches to pressuring recipients, their framework is pseudo-scientific, rather than political and economic. In the next section, I will describe the agenda-driven, evidence-based approach underlying the EFA-FTI Indicative Framework.

THE WHAT-WENT-RIGHT APPROACH

Of all knowledge banks, the Education for All-Fast Track Initiative (EFA-FTI) best illustrates the politics and economics of statistical knowledge. In 2002, the EFA-FTI was launched at a meeting of the G-8 in Monterrey, Mexico. The FTI was supposed to help reform-minded governments of poor countries implement universal primary education by the year 2015. The goal of achieving universal primary education by this date was inscribed in the 1990 international agreement Education for All (EFA), and confirmed in the UN Millennium Development Goals of 2000. A major priority shift occurred between 1990 and the new millennium: Whereas the emphasis in EFA (1990) was on universal access to primary education, the focus of the MDGs (2000) and the EFA-FTI (2002) is on *completion* of primary school education. The question for policy-makers became not only how to attract children to school, but also how to keep them there for at least 4 to 6 years. The new priority implied more consideration of how to improve the quality of education. A new and compelling approach to this issue was taken up by a group of World Bank economists (see Bruns, Mingat, & Rakotomalala, 2003) who decided to study the educational systems of ODA-recipient governments that had or were likely to achieve universal primary completion by 2015. By asking what these countries had done right that would be worth emulating, they provided the foundation for the EFA-FTI Indicative Framework.

The ideas underlying the EFA-FTI were sensible and compelling to policy-makers: Governments from low-income countries need to be given incentives for borrowing "best-practices" from other comparable educational systems that succeeded with universal primary completion. In order to reward reform-minded governments, the international donor community would commit itself to securing and providing the necessary funds for reforms, placing such governments on the "fast track" to development. In 2002, 18 countries were invited by the G-8 to submit proposals for consideration in the initiative.

FTI has grown exponentially since its inception. As of October 2007, 36 education sector plans have been endorsed, and the EFA-FTI Secretariat

expects that seven countries will qualify for FTI funding in 2008, followed by 13 more in 2009 (EFA-FTI Secretariat, 2007, p. 9). The Education Program Development Fund (established in November 2004) added substantial resources to the already-existing Catalytic Fund. However, pledges for the Catalytic Fund and the Education Program Development Fund are smaller than the EFA-FTI Secretariat had expected, calling into question whether the eligible incoming countries will receive the same level of funding as the ones already approved during the first FTI cycle, 2002–2005. Apart from the Netherlands and the United Kingdom, which contributed 75% of the total pledges in the Catalytic Fund, the donors have shown weak enthusiasm. Norway is the lead donor for the Education Program Development Fund (\$34.8 million out of \$53.32 million), followed at much lower participation levels by the United Kingdom (\$5.9 million) and Canada (\$3.4 million). The United States is, as of 2007, entirely absent. It has not contributed to the Catalytic Fund or the Education Program Development Fund of FTI. Other large donors, such as Japan, Germany, and France, have only contributed cosmetically to the EFA-FTI funds (EFA-FTI Secretariat, 2007, p. Annex 2 and 3). Even though more than 30 bilateral, regional, and international agencies and development banks have supported the initiative, the World Bank is the lead coordinator and host to the EFA-FTI Secretariat. The spirit advocated in FTI is “harmonization,” in that all 30 donors are supposed to be “using common arrangements for aid, sharing their technical and analytical work, and joining together on field missions” (World Bank, 2005, p. 2).

The 2015 benchmarks of the FTI Indicative Framework (Bruns, Mingat, & Bakotonalala, 2003, p. 73) address three areas: service delivery, system expansion, and system financing. For example, one benchmark determines that the average annual teacher salary should be 3.5 times the annual per capita GDP by the year 2015. Another benchmark requires that the student-teacher ratio should be 40:1. According to the World Bank, these benchmarks have been determined on the basis of empirical evidence. First, researchers at the World Bank examined 155 developing countries and identified 69 top-performing educational systems with regard to universal primary education completion rates. These 69 countries were deemed to be “on track,” because they either already have, or are likely to achieve, universal basic education by the year 2015. Second, researchers focused their analyses on the 69 countries and asked what they “did right” in the areas of service delivery, system expansion, and system financing (Bruns, Mingat, & Rakotomalala, 2003, p. 58). Table 13.1. lists the resulting standards, or FTI benchmarks, that were established in 2002 based on the study of 69 top-performing educational systems in developing countries mentioned above.

Table 13.1. The EFA-FTI Indicative Framework

| <i>Variables That Affect Primary Education Efficiency and Quality</i> | <i>2015 Benchmarks</i> |
|---|------------------------|
| SERVICE DELIVERY | |
| Average annual teacher salary (as multiple of per capita GDP) | 3.5 |
| Pupil-teacher ratio | 40:1 |
| Spending on inputs other than teachers (as % of primary education recurrent spending) | 33 |
| Average repetition rate (%) | 10 or lower |
| SYSTEM EXPANSION | |
| Unit construction cost | \$6,500–\$12,600 |
| SYSTEM FINANCING | |
| Government revenues as % of GDP (staggered targets proportional to per capita GDP) | 14/16/18 |
| Education recurrent spending as % of government revenues | 20 |
| Primary education recurrent spending as % of total education recurrent spending (benchmark is 50% for a 6-year primary cycle; 42% for a 5-year cycle) | 50/42 |
| Private enrollments (as % of total) | 10 |

Source: Bruns et al., 2003, p. 73.

Apart from a \$1 billion shortfall in pledges during the period 2008–2010 in the Catalytic and Education Sector Development Funds, mentioned above, there are also three problems highlighted by the EFA-FTI World Bank Secretariat (2007) at the country level: incongruence of statistical data between international and national databanks, inconsistencies between the international Indicative Framework and the national education sector plans, and an inability to measure *good* primary education. First, according to the EFA-FTI Secretariat (2007) the gap between what Ministries of Education report in terms of enrollment figures and what the

UNESCO Institute for Statistics determines is more than three percentage points. In some cases, it is as high as 20. For a donor strategy that relies so heavily upon benchmarking and monitoring annual targets, the incongruence of statistical information is so grave that it calls into question the very foundation of evidence-based planning.

Second, Ministries of Education are supposed to use the Indicative Framework and the EFA–FTI Appraisal Guidelines as a foundation to develop their education sector plans. The standards provided by the two international documents, however, are only reluctantly applied by the Ministries of Education. Of those countries approved for EFA–FTI, only 64% referred to the Indicative Framework. Naturally, for EFA–FTI, such a disregard for international standards is a cause of great concern, and a series of corrective measures has been put in place, including funds to provide a “quality support review from external experts” (EFA–FTI Secretariat, 2007, p. 21). Such measures are meant to ensure that the national education sector plans comply with the reform areas predetermined in the country-specific EFA–FTI appraisals, prepared by international consultants, and the international Indicative Framework.

Finally, commitment to completion of—rather than just access to—primary education requires greater attention to improving quality. According to EFA–FTI, a quality assessment can only be made by means of international student achievement tests. To date, seven ODA-recipient governments have participated in TIMSS (Trends in International Mathematics and Science Study), PIRLS (Program in International Reading Literacy), and PISA (Program in International Student Assessment), and EFA–FTI envisions that many more countries will, with external financial assistance, participate in internationally standardized tests in the future. The multilateral and bilateral donors are attempting to increase the number of countries that bring their education sector plans in line with EFA–FTI and expand the Indicative Framework to include other relevant benchmarks that relate to quality of primary education. They also hope, in the near future, to increase the number of countries that endorse education sector plans that move beyond primary education into early childhood and secondary education (EFA–FTI Secretariat, 2007, p. 31).

The study of knowledge banks as a new education policy tool is an emerging field in international and comparative education. As mentioned earlier, Phillip Jones (2004) explains in detail the various stages of policy development at the World Bank, identifying the most recent as the era when the Bank envisioned itself both as an education policy lender and as a loan provider. Other scholars have also investigated the transformation of multilaterals—in particular, the World Bank—into knowledge banks. However, they sometimes restrict their analyses to technology and

knowledge transfer, i.e., the Global Gateway (King, 2002, 2005), or to the World Bank’s Knowledge for Development (K4D) and Knowledge Assessment Methodology (KAM) programs (Robertson, 2008). It might be more accurate to see the proliferation of global databanks and knowledge banks as a consequence of the standardization of aid.

Of all recent initiatives, the EFA–FTI manifests most visibly the strategy of international target-setting as a means to influence domestic policy. The haste and carelessness with which the FTI grant proposal was prepared (e.g., 3 months in Tajikistan and Kyrgyzstan) and approved was noticeable. Moreover, some reforms were already funded by other donors. Certain countries, such as Mongolia, were approved for EFA–FTI even though they were considered, with a primary completion rate of 95%, to be “on track.” However, in contrast to ODA loans and grants, there are fewer strings attached. EFA–FTI, along with the emergence of new donors, has changed the aid environment in major ways. The pace at which low-income countries receive funds from the EFA–FTI Catalytic Fund or the Education Development Fund is breathtaking. The ease with which EFA–FTI proposals are approved is astounding, given that, for more than 2 decades, the Cartel of Good Intentions (Easterly, 2002) and development banks imposed rigid and ambitious conditions (structural adjustment, poverty alleviation, good governance) for their loans and grants. Even though the Monterrey Consensus of 2002, which marked the beginning of the new EFA–FTI era, continues to list 73 actions that ODA recipient countries must undertake, nobody seems to take them seriously. William Easterly explains why:

Meanwhile, the U.N. International Conference on Financing for Development held in Monterrey, Mexico, in March 2002 produced a document—“the Monterrey Consensus”—that has a welcome emphasis between rich donor and poor recipient nations. But it’s somewhat challenge for poor countries to carry out the 73 actions that the document recommends, including such ambitions as establishing democracy, equality between boys and girls, and peace on Earth. (2002, p. 40f)

TARGET-SETTING IN PRACTICE

The EFA–FTI proposals seem highly analytical in that a host of statistical material is presented to demonstrate the need for immediate action. The authors hired to prepare the EFA–FTI proposal are expected to make the case that the educational sector is in crisis, and in need of major and immediate external funding. It is also assumed that they will say that the government has the capacity to implement major reforms. The greater the

deviation from the MDG target—universal primary school completion—the greater the crisis, and in practice, the greater the willingness of donors to cover the funding gap.

Once the sense of crisis is invoked, the analyses follow a script like the one illustrated by the data on dropout rates. The dropout problem during primary school is supposed to be eradicated by the year 2015. International consultants determine the dropout rate for the base year (the year EFA–FTI is launched), and then set targets for each subsequent year until the rate reaches zero. The simulation includes vague considerations of what must be undertaken in the next few years to actually produce a reduction in dropouts, and the costs are calculated with implausible precision. As a final step, the “funding gap”—the amount the recipient government is not able or willing to finance for the vaguely formulated reforms of the next couple of years—is determined. The gap is then closed with the Catalytic Fund and the Education Development Fund, established to provide external financial assistance.

The donor logic reflects a new way of doing development business. However, it would be wrong to assume that the standardization of aid, propelled by EFA–FTI, has significantly transformed the way administrators and teachers operate at the school level. One example is Mongolia, a country in the East that, along with more than 30 other post-communist countries, has become part of the new global South. Countries with centralist governance structures, like Mongolia, are perfect for examining how standardization plays out in practice. They tend to demand that the lower levels of administration (province level, district level, school level) tailor their plans to the national agenda to achieve, at least on paper, universal primary school completion by the year 2015. In Mongolia, these multiyear plans, which already existed during the socialist period, are today reframed as education sector plans, or the “Master Plan.” The school’s Master Plan is supposed to conform to the 650-page Master Plan of Mongolia 2006–2015, formulated in 2006 by Mongolian experts, with substantial input from international consultants hired by the Asian Development Bank (Government of Mongolia, 2006).

Throughout 2007, the School Master Plan was discussed daily, and schools eagerly shared what they had produced for the Ministry of Education, Culture, and Science.³ The School Master Plans typically consist of four sections: assessment of the schools’ current situation, the school’s mission, the school’s vision, and the priorities of the plan (with benchmarks and indicators). The following is an example from a rural school in Undur-Ulaan in the Arkhangai province. I will confine my description to excerpts from the first section (assessment of the school’s current situa-

tion), and the last section (priorities of the plan). The first section reads like a narrative from any school in the South that has to operate with very limited resources:

Assessment of School’s Current Situation: High number of children who are out of school, underdeveloped learning environment, textbook shortage, limited opportunities for inservice training, weak collaboration between school and parents, insufficient number of student desks and chairs, shortage of teachers, unqualified teachers, difficult/poor living conditions of teachers, low quality and limited access to nonformal education for the illiterate, lack of comprehensive support for teachers to implement the new education standards. (Undur-Ulaan school, 2007)

The last section is disingenuous, composed of parts reflecting what the Ministry of Education, Culture, and Science wants to read (e.g., benchmarks for enhancing enrolment), and what schools want to express as their needs and the funds they desire to meet them from the Ministry of Education, Culture, and Science. The School Master Plan is identical to the EFA–FTI framework. It uses the same “façade of precision” (Samoff, 1999a, p. 261) to establish presumably exact, but ultimately unpredictable, benchmarks for enrollment figures over the next few years, while it also incorporates the concrete needs assessment developed by the school. The first two points are the ones that the Ministry of Education, Culture, and Science wants to read. The façade of precision manifested in such plans is quite specific, with decimal points denoting future developments in a school with just a few hundred students:

Priorities of the Plan: . . . Goal 2: To increase enrollment. To increase the net enrollment to cover 98% at primary level, 93.4% at secondary level and 95.6% at high school level. Timeline: 2007–2010.
(Undur-Ulaan school, 2007)

Of the 11 points listed in the section Priorities of the Plan, only two relate to the national Master Plan and to EFA–FTI. The other nine points summarize what schools actually need. The next excerpt is from the same section that deals with what the school really requires:

Priorities of the Plan: . . . Goal 3: To improve the material conditions for learning: (a) to supply all classrooms with new tables and chairs, (b) to repair a roof of the school building that accommodates 320 students and stop the roof leak, (c) to improve the looks of the school’s outside area, to repair the outdoor sports area and to ensure that the annual repairs of the school are well executed.

Other goals include “to build a hot shower for students accommodated in the school dormitory,” “to fully repair the kitchen facilities and buy necessary machines and kitchen tools,” and “to rehabilitate the vacant school building for 120 students as an additional school dormitory for students.” It is noticeable that the list of priorities that reflect a school’s needs (hot shower, new tables and chairs, fixing the leaking roof, and so forth) are supplemented with an action plan, and are far more concrete than the priorities derived from the national Master Plan. Of the 11 priorities listed in the Master Plan of Undur-Ulaan school, only the first two deal with the EFA–FTI benchmarks. The remaining nine are written as requests and correspond to the old genre of 3-year financial plans that schools were required to submit. In other words, EFA–FTI benchmarks have made it onto paper at the school level, but have very little consequences in practice.

Given schools’ disregard for decisions made between the government and donors at the central level, there is no great cause for concern that they are coerced into externally exposed reforms. Neither governments nor schools are helpless victims or passive recipients of reform packages. Even if they were, the goals pursued in EFA–FTI, including gender parity or elimination of nonenrollment and dropout rates, are hard to disagree with. But there is a legitimate concern, expressed by Jansen (2005) and others, that internationally set targets neglect, and thereby distract from and de-invest in, much-needed reforms at the national level. Notable among these are nonformal education, early childhood education, lower and upper secondary education, vocational education, and higher education.

For many educational systems, the exclusive focus on primary schooling, which international donors have pursued blindly for almost 20 years, has become outdated. The education sector strategies of Burkina Faso and Kenya, to name just two countries in Africa that tend to be unfortunately showcased by donors to justify the primary school focus, went on to outline planned reforms at the secondary school level. In the part of the world I work—Mongolia and Central Asia—EFA did not have any relevance in 1990 when it was conceived. At that time, most of the (post-) communist countries had achieved universal access to primary schooling, and were in the midst of completing multiyear plans for ensuring universal access to general secondary education (preschool and grades 1–10). Internationally established goals assume that all educational systems in ODA-recipient countries face the same challenges. What if primary school completion is not an issue, or what if gender parity is a problem because boys—rather than girls—are discriminated against? Mongolia is not alone in having an “inverse gender gap,” whereby girls outperform boys at all levels of schooling.

Government officials are quick to discover the political and economic gains that come with speaking the universal language of educational re-

form. In my studies on educational import in Mongolia (e.g., Steiner-Khamsi & Stolpe, 2006), I noticed that government officials take a different take when they address local constituents. Rather than labeling this practice doubletalk, I prefer to call it policy bilingualism, where one set of reforms is advanced with funding from donors (“global speak”), while another, sometimes diametrically opposed set of reforms, is promoted with local or national support. More often than not, money made available from international donors is redirected and channeled into supporting locally developed reforms, which in Mongolia are referred to as “national programs.” Governments of aid-recipient countries are not victims. Rather, they deal creatively with their economic dependence by redirecting funds into locally developed programs, adopting the language but not the content of an imposed reform; decline to implement an imported reform; or only adopt the reform selectively.

As mentioned earlier, international knowledge banks also contain a portfolio of “best-practices” that are transferred along with loans and grants. The ODA-recipient governments have no choice but to select from an existing portfolio. But how a government deals with the “best-practices” once they have been imported is a different issue. In my study of educational import in Mongolia, I analyzed structural adjustment programs in the educational sector that were implemented in the mid-1990s. Ten years later, one reform was still in place (tuition-based higher education), one was at first advanced and then was retreated (decentralization of educational finance and governance), and one had partially reverted to a structure that was in place prior to the structural adjustment reforms (rationalization of staff and reorganization of schools). It is important to understand how Mongolian government officials managed, with some reforms more than others, to undermine, adapt, or modify the educational import to the needs of the country. We lack studies that analyze reforms initiated and funded by international donors retroactively after 10 years or more. We would perhaps find, as in the case of Mongolia, that ODA-recipient governments have their own ways of selectively implementing reforms that had been externally financed. Which reforms they actually implement, which they modify, and which they subvert have been key research questions for research on policy borrowing and lending.

NORTH–SOUTH–SOUTH?

The emphasis on knowledge banks in this concluding chapter, the EFA–Fast Track Initiative in particular, has served to illustrate that lesson-drawing, or *South–South transfer*, is currently central to the operations of

international donors. Countries that the World Bank identified as “off track” and “seriously off track” with regard to universal primary completion are supposed to learn from other poor countries that are “on track” (Bruns, Mingat, & Rakotomalala, 2003; EFA–FTI Secretariat, 2007). This commitment to South–South transfer is asserted in the EFA–FTI Framework:

Globally, the FTI also aims to promote: *mutual learning on what works* to improve primary education outcomes and advance EFA goals. (EFA–FTI Secretariat, 2004, p. 3; italics in original)

The EFA–FTI Framework treats its commitment to promote “mutual learning on what works” as a priority, followed by the other “guiding principles of the Fast Track Initiative” (EFA–FTI Secretariat, 2004, p. 4): country-ownership, benchmarking, support linked to performance, lower transaction cost, and transparency.

In the case of the EFA–Fast Track Initiative, South–South transfer, or “mutual learning on what works,” is clearly defined. The “best-practices” of on-track countries are inscribed in the Indicative Framework of EFA–FTI. Ministries of Education are supposed to bring their education sector plans in line with the “best-practices” of systems that perform well. From this, they can learn how much to spend on primary education, what to pay teachers, how big class sizes should be, what are acceptable repetition rates, and so forth.

There has been tremendous growth in the number of knowledge banks that include both statistical information on indicators and portfolios of “best-practices.” The World Bank and other multilateral organizations are not alone in establishing such banks. In the wake of evidence-based policy-making, each and every major international organization resorts to its own data and “best-practices” for areas that matter to them. South–South transfer is not restricted to conventional donors, but also applies to “new donors,” such as the Millennium Villages Project of the Earth Institute, Columbia University, which draws from a private–public partnership and is heavily engaged in evidence-based lesson-drawing. The project selected 79 villages, clustered into 12 groups across 10 African countries (Ethiopia, Ghana, Kenya, Malawi, Mali, Nigeria, Rwanda, Senegal, Tanzania, and Uganda), and developed a sectorwide reform package that attempts to end poverty in these countries. These 79 villages will serve as showcases for neighboring villages, the 10 countries will serve as models for neighboring countries, and Africa will set an example, possibly, for the entire Third World. As the Millennium Villages claims:

Individual villages are now exporting their successful interventions to neighboring villages in their districts, and the result is a transforming Africa. (Millennium Villages, 2007)

South–South or East–East transfer occurs, but from where did the benchmarks, targets, and interventions emanate? In most cases, we deal with a North–South–South transfer or a West–East–East transfer, whereby donors in the North or West, respectively, have designed a standardized reform or intervention package for the global South. Nevertheless, it is striking that international organizations increasingly endorse South–South transfer or, to frame it differently, encourage lesson-drawing from other countries that have already successfully implemented externally financed reforms. International donors have also endorsed, at least rhetorically, South–South cooperation.

The authors of this book have contributed greatly to a better understanding of South–South cooperation by analyzing the phenomenon from different angles. As Linda Chisholm summarizes in her introductory chapter, several authors in this book examined changing notions of “South,” and with it, changing constellations of countries that used to be seen as “peripheries.” Another group of authors examined the modalities of transfer and cooperation as reflected in policies and practices of bilateral and multilateral aid, national governments, and nongovernmental organizations, as well as multinational businesses. Finally, the book concludes with several chapters that question whether South–South cooperation really is a way out from the dependency trap in educational development.

As with transfer, cooperation among the individuals and institutions in the South reflects a changed environment for aid. It is an environment that has become increasingly standardized, prescriptive, and coercive for national governments. The new emphasis is on benchmarks, standards, and targets. How governments in the South achieve these benchmarks, established in the North, is secondary. In fact, “national ownership” has become the buzzword of the new millennium. How governments choose to implement reforms in line with internationally set targets is left, to some extent, up to them. In this new era of evidence-based policy-making and standardized aid, South–South cooperation can be seen as a vehicle to accelerate the accomplishment of development targets established by the North. Perhaps we need to curb our enthusiasm for this revitalized concept in development and acknowledge instead that South–South cooperation is part and parcel of standardized aid, designed, funded, and monitored by the North. The Cartel of Good Intentions has strengthened and expanded its global governance and is now granting some leeway to ODA-recipient

governments in the South. The purpose, however, is to achieve the standardized targets, determined in the North, in a more efficient and, if possible, cost-effective manner.

NOTES

1. In an earlier study on Achimota in colonial Ghana (Steiner-Khamsi & Quist, 2000), we examined the "technical assistance" provided by African American elites to schools under British colonial rule during the first 2 decades of the 20th century. The idea that South-South cooperation is particular to the 21st century is regularly advanced by the UNDP and UNESCO. For the notion that it is funded by only a few states, notably Japan, see Mochizuki's chapter in this book.

2. Two sources of U.S. overseas loans and grants, in particular, reflect the blurred line between military and humanitarian assistance: the Economic Support Fund (\$3.8 billion in 2006) managed by USAID and the State Department, and the Department of Defense Security Assistance fund (\$4.7 billion in 2006). The Greenbook *U.S. Overseas Loans and Grants* provides a more detailed description of how these funds are disbursed (U.S. Government, 2006).

3. My collection of school-level Master Plans comes from two program evaluations that I conducted on behalf of the Danish International Development Agency DANIDA (Rural School Development Project II) and the NGO Mongolian Education Alliance (Rural Education and Development Project, component classroom libraries, funded by the World Bank).

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