



Foreword and summary of the Report:

Scaling up EU impact on education post-2015

By Birgitte Lind Petersen, Danish Institute for International Studies



Photo: Lotte Ærsøe/IBIS

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This is a the foreword and summary of a study commissioned by Alliance2015 via its Danish partner organisation IBIS, with the aim of updating existing knowledge on EU aid to education and thereby informing the advocacy work of Alliance2015.

Alliance2015 is a strategic network of eight European non-government organisations engaged in humanitarian and development activities, and committed to the Millennium Development Goals. Its members are ACTED from France, CESVI from Italy, CONCERN from Ireland, Hivos from the Netherlands, IBIS from Denmark, People in Need from the Czech Republic and Welthungerhilfe from Germany. The eighth member, HELVETAS Swiss Interco-operation, joined Alliance2015 in December 2013.

The study is an independent report, researched and written by Birgitte Lind Petersen, Danish Institute for International Studies, in February 2014. The study has benefitted from assistance from PhD fellow Adam Moe Fejerskov for data collection and background research, and from a critical reading by senior researcher Lars Engberg-Pedersen, both from DIIS.

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From Challenges and Opportunities to Action - delivering on the ambitious policies?

At a critical time in the countdown to the Millennium Development Goals, and as the international community shapes the post-2015 development agenda, it stands clear that there are significant challenges to be addressed around the unfinished work of the MDGs. The goal on education of ensuring that every child will be able to complete basic education, regardless of their circumstances, and have basic literacy and numeracy skills will not be achieved by 2015. Moreover, a more ambitious agenda and goal setting is needed in order to ensure provision of quality and relevant education in the years to come.

The EU is a large player in education and has a special responsibility in demanding that education should be prioritised in international cooperation as an enabling right and fundamental to development. On May 23, 2013 Development Commissioner Andris Piebalgs announced that at least 20% of the 2014-2020 aid budget is to be foreseen for human development and social inclusion, education being a main component, and confirmed that education is a priority for EU development post-2015. The EU's commitment to promoting education is further confirmed by the decision to host the Global Partnership for Education's Second Replenishment Conference in June 2014 in Brussels, Belgium.

Despite all these efforts according to the Global Monitoring Report, 21 bilateral and multilateral donors reduced their aid disbursements to basic education between 2010 and 2011, including the European Union. Only five of 15 members of the European Union that agreed to increase their aid to 0.7% of Gross National Income by 2015 are expected to meet their commitment. Currently, there is a financing gap of \$26 billion globally each year between what is needed to ensure that all children can go to primary school and what is actually invested to this end. If lower-secondary school is included the gap increases to \$38 billion each year. This is why the post-2015 education goals must include a target for financing by partner governments and donors.

In January 2013, with the support of the EC, Alliance2015 launched a new advocacy initiative to strengthen dialogue on Europe's role and responsibilities in relation to fighting hunger and under nutrition and enhancing its impact on education up to and beyond 2015.

The current report provides an important source of information and basis for further dialogue between platforms of organisations active in education and development outside the EU and strengthening these platforms /networks and their interactions with EU institutions. The report comes up with a number of recommendations on areas in which the EU could enhance its impact on education. The EU has the opportunity to stand out as a role model in the financing of education: through a planned progression towards achievement of the 20% commitment and in delivering a commitment commensurate with its leadership role in the upcoming GPE replenishment.

I will end by echoing Ms Irina Bokova, Director-General of UNESCO, who on the occasion of the Alliance 2015 Dialogue Round-table on Education 31 March 2014 called for urgent action to address the under-funding of education as follows: *"We must see this in the wider context of financing for education. First, governments must prioritize education in their domestic spending and expand their tax base. Second, donors must recognize the tremendous cost of not investing in education today."*


Vagn Berthelsen, Alliance2015
Secretary General IBIS

Executive summary

The world is facing a massive educational challenge. Too many children and young people are not in school, and many of those who are still do not learn. The situation is worst in the poorest and most fragile states, especially in Sub-Saharan Africa. Inequalities are vast, and some are even growing. Several global initiatives have been launched to ensure that the second Millennium Development Goal is achieved. However, the fundamental problems of a widening gap in finance, falling commitments from donors, an increasing number of targets and a lack of clarity about how to ensure the most important issues of equality and quality in education, remain to be handled. The EU is a large player in education, home to some of the most progressive donors, who can play important roles in meeting the challenges and scaling up the impact on education.

The study

This study analyses recent trends and changes in European Union (European Commission and selected member state) aid to education. In light of the global challenges, it identifies potentials for increased EU impact on education after 2015, considering especially how the EU can contribute to building better education systems, ensure quality learning and enhance financing for education. The analysis concentrates on the EC and six member states: Denmark, France, Germany, the Netherlands, the United Kingdom and the Republic of Ireland, which together provide around eighty per cent of total aid to education from EU member states, making them important actors in education.

The EU and education

The EC is a strong proponent of support to education, but action has so far lagged behind the policies. A new internal structure, seven-year programming periods, a strategic choice to limit support to three sectors per country and the new development policy, 'Agenda for Change', provide the basis on which the EC aims to meet future challenges. The EU has agreed a joint policy commitment and an internal division of labour to meet global education challenges.

Trends in EC support to education

Since 2006 the EC has, overall, increased aid to education, despite a decline since peaking in 2010. However, it has decreased support to low-income countries and Sub-Saharan Africa, while prioritising student exchange programmes and aid to middle-income countries, especially in its own neighbourhood. While the EC has remained firm on achieving MDG2 and launched an extra funding initiative to meet this end, the impact has been too small, especially in ensuring quality. The EC is increasingly making use of budget support, where the actual impact is difficult to trace, but is commended for its strong alignment with national priorities. Under the new strategy more fragile states will receive support, but human rights, good governance and democracy conditionalities apply. The EC is increasingly focussed on youth education and its links with employment, peace and active citizen involvement.

Trends among member states

The UK is leading the way, with strong policies, a strong focus on poverty and substantial and increasing funding. Germany and France are both large donors to education, but France gives alarmingly little to the countries that are most in need. Both are strong advocates of education, but much of their aid goes on exchange students. Germany has recently committed itself to promoting mainstream education in its development work. The Netherlands has been a lead donor, but will phase out all bilateral assistance in the course of the next few years due to a change in its strategic priorities. Denmark plays an important role in

advocacy and support to fragile states and will provide primarily multilateral aid. Ireland's aid to education is small but important, as it is entirely directed towards the poorest countries.

Strengths of the EU in education – a strong basis for enhanced impact

Strong donor with a wide reach. The EU (EC and member states) is a big donor to education, committed to the MDGs and the EFA, and engaged in the post-2015 agenda mainly in relation to poverty eradication. The EC's programmes reach more widely than those of any member state to a number of poor and fragile countries where individual member states cannot reach. Therefore, the EU is uniquely placed for policy dialogue on various aspects of equality, quality and citizen involvement in these countries, voicing collective EU priorities.

Ambitious policies of the EC and several member states. The Agenda for Change, amplified by commitments from the Commissioner for Development, reveals an ambitious focus on education as the basis for ensuring other development objectives. The UK also has very ambitious policies, as well as experience in ensuring inclusion and quality. Germany aims to mainstream education into all development work, by far the most ambitious priority, which still needs to be materialised. Several member state agencies declare their development policies to be comprehensive, with education being an integral element.

EC programming is long-term and predictable. The EC programming period is seven years. This allows for predictable, long-term funding, which is a prerequisite for building education systems.

The EU is home to strong advocates, specialists and role models in education. The EU is home to some of the strongest advocates within education. It has unique expertise, especially in the UK, but also in the other countries. Several member states are increasing aid to education (Denmark, Germany and UK), and support basic education and countries most in need (Denmark, Ireland and UK). Although Denmark is a small country, it has played an outstanding role in advocating education at global events. Ireland, another small country, has a strong focus on poverty and education and is actively engaged in the Global Partnership for Education (GPE). France is also active in supporting GPE and leads the local education groups in several countries. Germany is a strong advocate for education and has found ways to get around its thirty percent constraint on allocations to multilateral organisations by funding the BACK-UP initiative as alternative GPE support. The UK is by far the most influential member state donor financially, both in developing new areas within education and in terms of expertise.

Alignment with national priorities and global actors. The EC and member states such as Ireland, Denmark and the UK align with national priorities. They have been among the frontrunners in prioritising budgetary support.

Unique platform for coordination. The EU, with the EC as a central actor, and several lead donors in education among its member states is a unique platform for coordination. Formal channels already exist, although it seems that systematic coordination beyond specific partner countries could be enhanced. Coordination, alignment and division of labour are strengths in implementation and policy dialogue.

Strong support to the GPE. The EC and member states all emphasise their commitment to GPE and its importance, and they play unique roles in supporting and influencing the impact of GPE. France is leading many local educational groups in partner countries, Germany has launched the BACK-UP initiative to support the impact of partner country constituencies in the board of the GPE, Denmark is a strong advocate for support to the GPE, and both Ireland and the Netherlands actively support GPE in policy.

Strong civic involvement. The EU has a comparative advantage in ensuring citizen involvement in education. The EC prioritises civil-society involvement through a new policy, structured dialogues and strategic use of the thematic instruments 'Investing in People' and 'Non-state actors and Local Authorities in Development'. The aim is to support the scaling up of existing practices and this has enjoyed good results through support of new approaches. Moreover, it is intended to involve local people in improvements of equity and quality by including them in piloting new modes of teacher training, curriculum content, school building and maintenance.

Weaknesses of the EU in education: hampering impact

There is generally a lack of clear equity and quality targets, except for the UK. The EC does not have an education strategy to set out how education will be prioritised in the new development policy. A lesson learned from the past period of global commitments is that, without clearly defined measures and targets, the EC and member states cannot be held accountable, nor can be regarded as upholding great ambitions to ensure equity and quality in learning.

Financing is inadequate and not primarily directed at those countries, groups and education levels that are most in need. The EC still allocates a large part of its aid to middle-income countries and its own neighbourhood, although the new programming period includes more fragile states. The Netherlands is de-prioritising aid to education, which is not only bad for financing in general but leaves a funding and expertise gap in the countries affected. Secondary education in general receives too little support from the EU. All member states are strong supporters of the GPE but, apart from the UK, most of them need to increase funding.

Priorities often lack clear targets, especially with regard to equality and quality. Apart from the UK, clear targets are needed for donors within the EU, not least also to ensure, through a division of labour, that ambitious change can be secured.

Inflated aid. The EC, and especially France and Germany, record imputed student costs as an aid to education. This does not build up education systems and is a major concern, which, when taken into consideration, contributes to making generous donors appear much less so.

There is a shortage of education expertise in the EC, which is a great hindrance to increasing impact. The EC needs proper capacity to influence global processes, carry out education-sector support, engage in a qualified policy dialogue involving marginalised groups and ensure quality learning.

The EC is rather slow, bureaucratic and inflexible. The EC is a large and bureaucratic system, which is a major reason why ambitious policies are not always sufficiently implemented. Moreover, the seven-year programming period, while ensuring predictability, hampers flexibility.

Lack of coordination when member states reduce their support. Decisions to decrease aid, withdraw from countries or redirect to other geographical areas and levels of education are not always coordinated with other EU donors, nor is consideration given to ensuring the long-term sustainability of education support to countries and people most in need. The Netherlands and Denmark have withdrawn their bilateral assistance, which leaves a funding gap in the affected countries and represents a serious blow to long-term sustainability in education support if other forms of support are not provided.

How the EU can help to build better education systems and ensure equitable, quality learning

Implement the ambitious policies

Education is prioritised alongside health and social protection in the Agenda for Change, this being fundamental to human development. Recently, the Commissioner for Development has emphasised the importance of education and commitments to ensure equity and quality learning for all children by 2030. Most member states (except the Netherlands) have ambitious policies. These ambitions must be backed up by practice, as they can greatly increase the impact on education if implemented.

Compile the strengths of the EC and member states and promote role models

The EC and most member states have strengths and reveal positive trends that should be drawn together to enhance impact. A division of labour building on strengths can enhance impact, and the positive examples can also be used as role models inspiring or strengthening others. For example, the UK has expertise which the EC is lacking, and the UK can help capacity develop the EU in new areas of education such as fragile states and alternative models of financing. The EU as a whole has comparative advantages in ensuring equality for marginalised groups in access and participation, in involving various civil actors in the provision and management of education, and in ensuring new and innovative forms of education.

Continue and systematise coordination: not least when donors withdraw

Considerable coordination takes place, but it is often not very systematic. Member states coordinate with each other and with EU delegations in concrete geographical settings and for specific tasks, but there is room for improvement in relation to coordination prior to withdrawing from partner countries and coordination to ensure that, when new countries are selected, the focus on their own strategic priorities pays attention to the number of EU donors already present, their capacities and focus areas. Member states coordinate when they are donors in the same countries, but they could increase impact by drawing on each other's capacities within specific areas and in influencing the EC's positions. A division of labour has already been agreed, but more systematic use of the comparative advantages of each country would enhance the overall impact.

Ensure a balance between bilateral and multilateral support. Bilateral aid to education on the part of the EC and member states is highly valued for its alignment with national priorities and as a counterweight to development banks, with their greater number of conditionalities. Support through the GPE is also aligned with national priorities and focuses on poor countries and basic education, and is therefore important in combination with the bilateral support.

Specific equity and quality priorities with clear definitions and targets, preferably through an education strategy. Equality and quality are common priorities, but whereas equality is primarily about gender and needs to be broadened, there is very little specification of what quality entails for most EU donors. There is a need for an education strategy specifying the EC's priorities, as well as to focus specifically on the specific advantages of the EU in work on inclusion.

Continue to enhance civil society involvement for good governance. The structured involvement of civil society bridges the EC, member states and partner countries, and is a key to enhancing impact through innovative new ways of working, scaling up and developing a bottom-up approach to ensuring proper governance. Also, a more strategic use of the thematic instruments is useful to ensure that non-state actors and civil society or NGOs play a part in ensuring educational priorities by obtaining support to scale up initiatives with a good impact and developing new innovative practices to ensure equity, quality learning and good governance. However, procedures for NGOs to acquire thematic funding need to be simplified.

Stop the decline in budget support and limit conditionalities. The EC prioritises budget support, but it is in decline, which is also the case for several member states. The EC follows national priorities and is acknowledged as a sensitive and well-coordinated partner by other donors and partner countries. With the new EC programming, and with the resulting focus of several member states, more conditionalities apply. Conditionalities should be limited. The EU should continue to convince member states to use budget support.

Strengthen education expertise in the EC. This is vital for proper involvement in the GPE and global education settings. It is central to ensuring coordination with member states, not least to ensure qualified support to the work on equality and quality.

Promote and explore new practices. Innovative practices like the BACK-UP initiative and DfID's Girls' Education Challenge are new ways potentially to scale up impact in areas that have hitherto been left unexploited.

How the EU can ensure financing for education

Be accountable to commitments. For the EC, there is a need for more specific and concrete commitments to the promise of allocating twenty percent of total aid to health and education. For the member states there is a need to set clear, ambitious, long-term targets for financing education.

The EU should stand out as a role model in financing when hosting GPE replenishment. Hosting the replenishment conference obliges the EC, but also member states, to show their commitment to ensuring financing for education. For countries like Denmark and the Netherlands that are phasing out bilateral aid, there is a need to enhance their pledge to show commitment to education. This will benefit low-income and fragile countries, and demonstrate their commitment to focus on the countries that are most in need.

Collective commitments are needed to ensure alternative sources of financing. The EC and member states need to show sincere effort, and set targets, for developing and encouraging new sources of financing for education. The EU is uniquely placed to find new forms of financing for education. There are already several initiatives underway. The EU should be encouraged to use its position more actively in policy dialogue to explore, with governments, the prospects for domestic financing, use its relations with the private sector to leverage funds and encourage philanthropic funds and diaspora groupings within the EU to support education. It is important to ensure that alternative, especially private-sector financing of education does not compromise policy priorities.

Decline in bilateral funding should be followed by increased multilateral, especially GPE, funding. The adverse funding trends of the Netherlands and Ireland should be followed by an increase in multilateral funding, especially to the GPE. GPE should provide data to the OECD–DAC to allow monitoring and permit EU donors to be held to account, not least donors like Denmark, which are redirecting almost all their aid from bilateral to multilateral support.

Broad-based knowledge of, and support for, education is needed within the EU

The EU public is generally in support of development aid. But support is falling, and one reason may be that there is a fundamental lack of knowledge about the crucial importance of education for other aspects of development. Communication about these aspects by the EC and member states respectively is highly important for increasing public support and pressure and, as an effect of this, financial support from private-sector actors.