

PN-AAY-070^{AC}

ISN 50061

A STUDY OF TRENDS AND PRIORITIES

IN EDUCATION

IN LATIN AMERICA AND THE CARIBBEAN

This study was completed under Contract AID/LAC-C-1278 undertaken
by Paula Diebold de Cruz.

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Revised Edition
September, 1979

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INTRODUCTION

INTRODUCTION

In response to the continuing concern expressed by Congress as to how limited available financial resources can be invested most wisely to promote the socioeconomic development of the poor of the Third World, the Assistant Administrator, Bureau for Latin America and the Caribbean, of the Agency for International Development (AID) authorized the current study. The purpose of the research has been to identify recent priorities in funding by host governments and international donor organizations. It was hoped that description of such priorities would lead to the identification of both trends and neglected areas -- or "gaps" -- where future increased investments would lead to important "pay-offs" in both formal and non-formal education programs.

This report is based on three major data sources (1) the reports and studies of seven^{1/} major international institutions the Organizations of American States (OAS); the United Nations Educational, Scientific and Cultural Organization (UNESCO) and educational programs of the United Nations Development Program (UNDP) which UNESCO monitors; the International Bank for Reconstruction and Development (IBRD); the Inter-American Development Bank (IDB); the Inter-American Foundation (IAF), the Ford Foundation; and the United States Agency for International Development (AID), (2) national plans and annual budgets of twenty-three Latin American and Caribbean (LAC) countries, and (3) a series of fifty-five interviews with educators, planners and decision-makers in Jamaica, El Salvador, Costa Rica, Colombia and Peru.

The first phase of data gathering concentrated on studies and other materials available from the educational research or planning divisions of donor agencies in Washington and New York. Current LAC national budgets were also studied. Supplemental interviews added to the conceptualization of the problems in education in Latin America. Formulation of the set of questions and selection of the countries to be visited and persons to be interviewed was carried out in coordination with LAC/DR staff. ²

^{1/} Although a number of other sources of bilateral, multi-lateral and non-governmental cooperation have been working in Latin America and the Caribbean region, included in this report were those considered to be the most significant.

^{2/} Howard D. Lusk, Kenneth L. Martin, Helen M. Ortiz, and Charlotte Jones.

During the second phase of data gathering, the author visited five countries from September 10 through October 4, 1978. Selected leaders, planners and policy makers in education and related development sectors were interviewed during this period. The purpose of the interviews was to obtain a range of opinions which would help to identify significant trends in education, their impact on development, and problems which most need to be resolved. A set of questions was developed to focus the discussions (cf Annex B). Frequently, the conversations covered a range of topics either broader or narrower than the original set of discussion topics. The annexed reports are compilations of the major points of each interview. Sources are not verbatim quotations because many sources did not wish to be quoted directly. Interviews were conducted in Spanish or English, as appropriate. The author gratefully acknowledges the extraordinary graciousness of all the persons interviewed, both the time they gave to discussing the issues and the valuable supportive materials which many of them supplied to her.

Although interviewees' opinions and statements are not identified as to their source in the reports due to the above-stated hesitancy to be quoted or even summarized, the conclusions are drawn from information gathered therein. A remarkable unanimity of opinion emerged from the interviews, but where a difference of opinion exists, it is noted.

The overall approach to this study has been mosaic. In attempts to identify trends, priorities and gaps, it has sought to interweave objectively verifiable indicators such as expenditures on education by host governments, policy statements by both, as well as impressions drawn from interviews with host country decision-makers. As a result, conclusions and recommendations made throughout the course of the study, as well as those expressed in the Executive Summary, tend to be less statistical and more in terms of general policy decisions.

Part II covers trends in international cooperation in education over the last ten years and changes in policies or goals as stated in the planning documents of those institutions and the countries with which they cooperate. Part III contains an overview of national trends based on country-specific and regional information for the Caribbean, Central America and South America. Parts IV and V, covering notable innovations in education and feasibilities and constraints to meeting unmet needs, are based in part on the interviews with LAC policy

planners and, in part, on educational research projects and evaluations. A final section identifies missing, unavailable or untapped areas of information which could well lend themselves to in-depth study with an eye toward future investment.

Annexes A, B and C contain material referenced in the body of the text but too lengthy for inclusion in the report.

Three assumptions form the basis of this report (1) that investment in education bears a positive relationship to socio-economic development; (2) that there are some generally agreed upon educational goals with systemic features which may or may not include traditional formal, state-supported school systems; and (3) that identification of trends in education will lead to the identification of gaps where host countries and international donors may choose to focus attention and resources in the 1980's.

There have been, for example, a number of serious scholarly works challenging the validity of the assumption that education has a causal relationship to economic development. However, a large body of evidence not only from the past quarter century of development in IAC countries but also from U.S. and Western Europe at the turn of the century, maintain that functional literacy, technical training, health information and practical knowledge received through schooling have at least a supportive relationship to development in other sectors.

The number and nature of agreed upon universal educational goals and concomitant systems for their accomplishment has fluctuated greatly over the past twenty years. Among the more pressing questions currently being asked include: 'Is the goal of universal literacy best accomplished through a formal or non-formal system of education? Does vocational education produce the full employment and national economic development which it promises? Will a curriculum adapted to local needs provide equality of educational opportunity for rich and poor, men and women, urban and rural dwellers, and diverse cultural and linguistic groups? And will such curricula promote the national integration necessary for accomplishing over-all

development goals? Will the applications of modern technologies to education improve both the quality and quantity of instruction while reducing per student cost and improving student performance?

These questions have few firm answers, in part due to the paucity of action-oriented research. The suggestion of research or evaluation implies another set of contested assumptions (1) that research findings reach the hands of policy makers, (2) that there is a positive relationship between research findings or evaluation conclusions and policy decisions, and (3) that policies based on these are in turn implemented given the constant conflicting demands of political pressures and scarce financial resources.

The distribution of available resources in order to accomplish the goals of education is one of the key problems facing all countries at whatever stage of development. This problem, described in terms of unbalanced rates of economic, agricultural, demographic, and educational growth was the major issue in World Educational Crisis (Coombs, 1968) and the problem has been seen to increase in intensity over the past ten years.

The foregoing description of the dilemmas of educational planning is not meant to imply, however, that no solid gains have been made or that the basic assumptions regarding education are without foundation. It is the high value placed on some of the goals of education that has made possible difficult choices as to how to allocate scarce resources. Under UNESCO's influence during the last two decades, there has been general agreement on the broad democratic aims of education: universal primary (or basic) education, universal literacy, equal educational opportunities for all segments of society, male/female, rural/urban, rich/poor, etc., democratization of post-primary education to provide greater access to higher education while offering the option of basic minimum vocational or skills training, and lifelong educational opportunities, including pre-primary and broader adult education.

The 1972 Faure Report, Learning to Be, commissioned by UNESCO, has had a profound influence on educational policy for this decade. Because of the formative influence of these goals, following the Executive Summary, this study begins with an examination of the trends in goal-setting over the past ten years and the influence of these trends on international cooperation in educational development.

PART I

EXECUTIVE SUMMARY OF TRENDS AND PRIORITIES
IN EDUCATION IN LATIN AMERICA AND THE CARIBBEAN

I. Introduction and Reconsideration of Assumptions

The study of trends in education in Latin America and the Caribbean was initiated with the idea of examining the investment patterns of international donor institutions supporting educational development and of the LAC countries themselves to determine if there were any discernible trends that would indicate areas where further support would contribute significantly to educational development.

The major sources of information for the report were the documents and reports of the donor institutions included in the study (UNESCO/UNDP, Ford Foundation, AID, IDB, OAS, and IAF), national budgets and education assessments, and interviews with educators and other policy-makers in five countries (Jamaica, El Salvador, Costa Rica, Colombia, and Peru).

As a basis for the report, several common assumptions were set forth, along with some of the current questions regarding those assumptions. The first, that education contributes to social and economic development, was supported by the sources consulted. However, if education is considered to be synonymous with schooling, then the initial assumption was more open to criticism. The formal education system is not universally perceived as contributing to development, particularly in those cases where the high costs of formal education drain resources from other sectors of the national economy which are also important to development.

The goal statements and investment patterns of both the international donors and the countries studied frequently equate education with formal schooling, but even so the basic assumption is supported. International assistance to education in Latin America and the Caribbean has increased from \$80.8 million in 1968 to \$170.2 million in 1977. Budgetary allocations for education tend to range from twenty to thirty percent of total national budgets. The goal statements of both groups clearly accept the assumption. However, in interviews with education planners, it becomes apparent that schooling, as it now exists, is no longer seen as the universal panacea for development problems that it once was thought to be. The criticisms these experts voiced included the following

1. Emphasis of education as a primary force in development has led to neglect of other contributors to development such as health services, housing, sanitation, employment-generating industrial development, and social welfare services.
2. The separation of education as an independent sector of the economy has isolated schooling from the mainstream of national

development and created a perception of education as an end in itself, apart from meeting the needs of the country and the individual. According to some of those interviewed, a more useful way of viewing education is not to isolate it as a separate factor, but to ask what are the problems and national development needs and how education and schooling can contribute to meeting those needs, in whatever sector they occur

3. The increasing costs and apparent low immediate social return on schooling have led some to question the high levels of national investment in education. None of those interviewed, however, suggested abandoning schooling. Instead, there was agreement that the broad base of education must be extended to the whole population, both through formal schooling and non-formal education efforts.

The second assumption, that there are certain generally agreed upon goals in education, was also verified by the study. UNESCO has been a major voice in articulating overall education goals and to some extent insuring their acceptance by the community of nations. Agreement by the international donors on the goals of support to educational development has become so strong that there is now danger of duplication of efforts in some areas - such as the current focus on the "poorest of the poor" - to the neglect of the other areas.

The third assumption, that identification of trends would lead to the identification of gaps or neglected areas in education, has also proven true. To a large extent, these gaps appear in the interstices existing between donor institution funding policies and mechanisms and host country considerations of a political and/or financial nature.

Another related assumption was that research affects policy decisions. While a good deal of research and program evaluation goes unheeded, due in part to a lack of adequate dissemination of the results, there were sufficient examples of research shaping educational planning to confirm the usefulness of research. In particular, the influence of the education planning office in El Salvador in the wake of the lengthy sector analysis, the contribution of research to the planning of the educational reform in Peru, Costa Rica's research on nuclearization, and the research on distance learning programs in Colombia, all affirm a positive connection between investigation and planning and implementation.

II. Synthesis of Trends in Education

The complete report on trends and priorities in education in Latin America and the Caribbean treats separately the goals and investment patterns of the international donor organizations and those of the countries of the region. This section of the summary is a synthesis of the two, examining first areas where there is particular agreement among donors and host countries and, then, areas where differences in goal, prioritization or strategy appear.

A. Areas of Congruence

Both the international donor agencies and the countries of Latin America and the Caribbean are in essential accord on the following:

1. The first goal must be the provision of basic primary education to the entire school-age population, both rural and urban, and the principal vehicle for this education should be the formal school system. However, non-formal avenues for providing instruction both in basic life skills and for income generation purposes should be utilized as a means of reducing costs, increasing coverage and effectively reaching that portion of the adult and youthful population which has been left behind by the regular school system.
2. Increased attention to rural education is emphasized in the goal statements of both host countries and international donors. Recognition is given to the fact that the rural areas have lagged far behind the urban in the development process of the past two decades. The gap between the two must be narrowed for reasons both of social equity and of increased economic productivity. It should be noted, however, that many of those interviewed felt that even with the new espoused emphasis on rural zones, urban areas may be benefitting as much under new investments as previously.
3. Greater emphasis is being placed on integrated development planning, which includes education as but one element in larger plans for local or regional development within countries. These programs seek to concentrate scarce resources for more effective use in agricultural development, employment generation, health, use of natural resources, and other areas.
4. All sources reviewed agree on the need for research directed toward the application of technology to education in order to provide more and better education to the target group on a more cost-

efficient basis. Such technology may range from large-scale, highly sophisticated projects in satellite communications to low-cost, intermediate technologies which can be adapted to local needs, resources and constraints.

5. With the growth of primary and secondary enrollments throughout the sixties and seventies, enrollment at the vastly more expensive university level also has increased. In attempting to meet this demand, many governments have had to increase the portion of their education budgets allocated to higher education at the expense of the lower levels. Donor organizations and host countries alike were in agreement that either the growth of university-level enrollments must be curtailed or more cost-effective measures designed to graduate students in fields relative to host country socioeconomic development goals must be found. Some countries have proposed fixing the percentage of the national education budget which can be allocated to higher education in the future. Several are approaching meeting additional costs through "Educrédito" programs, which have received considerable support from the international lenders.

6. A central concern of both host countries and international donors continues to be the financing of education at all levels. Country interviewees expressed the view that there must be some limit on the future growth of education budgets, perhaps even a reduction in percentages allotted to education in light of the pressing needs of other development sectors. A great deal more work needs to be done in such areas as more cost-efficient delivery systems and in education planning and administration in order to maximize scarce resources. The international donors continued to feel that the twenty to twenty-five percent budget figure which many countries were approximating was not unreasonable, and UNESCO maintains a baseline figure of four percent of GDP to be spent by national governments on education and human resource development.

B. Areas of Difference

In some instances, the national trend as seen in education plans and budget allocations or in interviews with national education and policy experts does not coincide with international donor policy. The following are general areas in which disparities exist:

1. Whereas host governments and donor agencies are in accord on the basic goal of improving the lot of the "poor majority", the reality is that while the international donors are at liberty to focus on that target group, national planning efforts must address the needs of the entire country. Conflicting demands on scarce resources, particularly by the more vocal "minority", often lead to central government budgets which do not reflect the stated goal. This is, in fact, possibly not an area of divergence between donors and host countries, as international grant and loan funding has been able to fill at least a small part of the gap left open by the realities of the national budgeting process.

2. Lessened reliance upon international support for projects requiring major capital investment -- and increased debt-servicing complications for the government -- seemed to be welcomed in most of the countries visited. School construction in particular was viewed as often imposing more burdens than those which it alleviated. Small projects designed to meet specific needs, particularly in the area of developing more cost-effective delivery systems, were stressed repeatedly in country interviews. Although most donors agreed in principle, current funding mechanisms of the agencies continue to favor large-scale investment programs.

3. Pre-school education is receiving more attention by host governments than it is in the plans of the donor organizations. In general, the donors have tended to feel that the magnitude of the problem of providing complete basic education for the poor was such that programs which appeared to be "luxuries", such as pre-school education, special education and development of sports, art and music should be postponed until a later stage of development. However, recent research into early intervention and child development patterns has led to some degree of rethinking of the question. The possibilities of combining nutrition and education projects, for example, is being explored in a number of cases. AID itself is currently completing a regional project in Early Home Intervention (Project Portage) and recently approved a grant project in pre-school education as a catalyst for parent and community development.

4. Although there is a stated commitment by both host governments and international donors to increased non-formal education for adults, national budgets in general do not reflect that commitment in increased expenditures under the auspices of the formal system. It may well be, however, that such spending may be

found within the budgets of individual Ministries of Agriculture, Health, Industry and the like, but further study will have to be undertaken to disaggregate such figures

5. Multi-national or regional projects on the whole are more favored by the international organizations than by host countries, which tend to view their needs as particularized. For example, the Convenio Andres Bello (Andean Pact) sponsored an extensive study of possible cooperation among the Andean countries in educational television projects, but to date, there has been little real commitment to multinational education programs on the part of Ministries of education.

III. Gaps in Investment in Education

The current study was undertaken by AID in an effort to discover "gaps" in education in Latin America and the Caribbean which would lend themselves to funding by the international donors -- and particularly AID -- in the coming decade. In reality, no strikingly new areas for funding were identified. Rather, the study has pinpointed a number of previously recognized areas to which increased international donor attention is felt to be in order.

1. The singlemost important concern of the host governments, as stated above, is how to pay for educating a rapidly expanding school-age population, as well as catching up on a backlog of youth and adults who have not received a proper education. This will continue to require funding and services from the international agencies both for administrative and planning reform and for the development of innovative research and development schemes which will make more and better education available to the poor, particularly in the rural areas.

2. Coordination and cooperation among the international donors working in a given country must be improved, especially as the program goals of the agencies become increasingly similar. Some type of mechanism to ensure that donor programs are not unduly repetitive, over-lapping or in conflict is strongly indicated.

3. Further encouragement for integrated, inter-sectoral development is needed. In this regard, it should be noted that host country interviewees stressed that, while models from other countries can be drawn upon as a rich source of ideas and experience, local or regional development models could not be simply imported.

4. A great deal of experience in non-formal education projects in Latin America and the Caribbean has been sponsored by private voluntary organizations. To date, little research has been carried out on the reasons for the apparent effectiveness of these programs. If the stated goal of both host governments and donor organizations is to place more emphasis on non-formal modes of education, then investigation into how such PVO projects have operated is indicated.

5. The lack of an effective means of dissemination of findings in research and development and in evaluation of education projects was agreed upon universally as an area of concentration of effort by host governments and international agencies alike. Formal and/or informal information networks must be fostered and the distribution base broadened within the region so that scarce research and development funds need not be wasted in the constant reinvention of the wheel.

6. Pre-school education continues to be under-funded with respect to the stated commitment to education at this level in many national plans. Although extensive expansion of efforts at the pre-primary level may well have to await completion of goals in the expansion of basic education, the international donors could work in the area of dissemination of existing research on early childhood education, including particularly the effects of nutrition at that age on subsequent in-school learning, and could cooperate in research and demonstration projects designed to determine the most effective modes of delivering early childhood education in collaboration with those governments which have expressed this as a goal and are in a position to carry out such programs at this time.

7. One area of severe neglect in education planning is the role of teachers and their unions. Hypothetically, perfect education reform schemes have met defeat because they have not dealt in advance with both the expertise and the inborn resistance of the teacher corps. Research projects which would investigate the various ways of maximizing teacher participation in planning should receive increased attention.

IV. Feasibilities and Constraints

In the study of trends and priorities, feasibilities and constraints were discussed in terms of individual national and international agency abilities to answer education sector problems addressed in the report. This section summarizes some of the obstacles which are involved not only in filling the specific gaps identified above, but also in the execution of current

programs.

Host country constraints include continuing rapid population growth, severe budgetary problems, changes in internal policy and administrative personnel due to political factors, the nature of recurrent education costs, personnel and management practices which exclude teachers from the decision-making process, inadequate prior investigation of problems of implementation in project design, and a disparity between progress in science and technology and curriculum design. Donor agency constraints include administrative practices which require excessively complicated disbursement procedures which delay project implementation, inadequate coordination among the international funding institutions, and policies of the international donors which may not coincide with national priorities and realities.

V. Recommendations

At the request of the office contracting this study, these recommendations are more specifically directed to AID's investment in education than are the more generally directed suggestions for future study contained in the main body of the report.

The neglected or problem areas in Latin American and Caribbean education in which AID could have some impact are (1) support for university and regional research centers, (2) sponsorship of a conference to coordinate international institutional planning in education, (3) assistance to integrated development projects, (4) dissemination of research results, (5) support for small-scale projects, (6) investigation of non-formal education and private voluntary organization capabilities, and (7) support for action-research.

Support for university and regional research centers would have the twofold effect of providing assistance to academic centers while encouraging the development of an internal capacity to conduct research relevant to national development needs. The rationale for supporting university and regional research is related to a suggestion encountered often in the course of the interviews: adaptation of existing technologies and methodologies for educational development is best done in the context in which the technology will be applied. This recommendation could be implemented through activities as simple as contracting project evaluations to local research groups instead of U.S. based groups, or stipulating that U.S. researchers must work with the local group.

A conference or study group to suggest ways of coordinating the efforts of the international institutions in the education sector appeared more and more necessary as this study progressed. Many of the persons interviewed saw this as a means of reducing waste of precious development resources. One of the original follow-ups planned in connection with this study was to be a panel of experts to define in more detail the priority areas for investment in education. If this definition could be carried out in connection with the policy-makers of other international institutions and with the advice of planners and researchers from Latin America and the Caribbean, an ongoing dialogue might be established which would give renewed meaning to the long-standing goal of cooperative development.

The Ford Foundation's Bellagio conference, which was intended to help the foundation focus its investments in education over a ten-year period could possibly serve as a model for the conference. In addition to defining priorities, a first task for the groups would be to devise a workable plan for coordinating international activities in Latin American and Caribbean education.

Ideally, this would not be a one-time conference, but a working group that would meet periodically to review progress in accomplishing its goals and to revise assessments of priorities.

Assistance to integrated development projects is an area in which AID has pioneered in the past and in which useful models for future projects are evident from the interest shown in this type of development project in LAC countries. INVIERNO in Nicaragua is an example. In effect, this kind of project is not specifically an education project, but is a development project in which education plays a role.

The planning of such projects requiring the coordination of activities of several sectors is more difficult than planning projects which treat education as an isolated sector. However, the need for models of integrated development planning is appreciated in LAC countries. In effect, this may mean the abandonment of some of the models of sectoral planning and the development of new models of integrated planning to answer specific development problems. The focus becomes solving the development problem rather than planning for the development of a sector of the economy.

The lack of dissemination of research results which might be useful to those planning similar projects is a recurrent problem. Journals and other publications serve this purpose to a certain degree but their appearance is sporadic and circulation is limited. Moreover, it was felt that active participation in study and discussion of the results by those who plan to adapt them to their own project planning is a more useful method. Sponsorship of local conferences in which, for instance, the results of research on educational technologies which local groups are thinking of using in their programs can be presented and discussed could serve the dual purpose of imparting information and fostering informal information exchange networks.

Support for Small-scale Projects refers to the donor agencies' branching out into funding for a greater variety of projects, either public or private, rather than continued support for massive public projects. The public education institutions visited all had a number of small-scale pilot projects in which they were testing innovations or merely meeting the specific needs in a particular school. Frequently, there is no intention of expanding the project, because its success depends upon its small scale. The importance of these projects and the difficulty of finding funding for them was stressed in many of the interviews with project planners.

Investigation of non-formal education and private voluntary organization capabilities is related to the sponsorship of the small-scale projects suggested above. The trend expressed in AID policies toward greater assistance for non-formal education projects and the utilization of private voluntary agencies as the implementors of those projects cannot be carried out effectively without a better data base regarding the existing state of such projects and organizations. A related investigation would be a study of community leadership training programs and the factors which contribute to their success or failure. While the private channel may be a viable alternative to publicly sponsored programs, a better understanding of the private groups and their management systems, costs and benefits is necessary to provide a base for decision-making.

Support for action research is support for improved program evaluations which allow for participatory input from both program implementors and program evaluators. Such research takes place before, during and after a project's life and is intended to provide a means of adapting the project model to meet new needs as they emerge during the implementation of the project. In particular,

support is needed for projects which would provide new models for adapting technologies to fit the cultural, social, and economic contexts in which they are to be used.

These recommendations are based on the suggestions received in the interviews with educators, researchers, and planners in Latin America and the Caribbean and on the gaps in educational investment identified in the larger study. These suggestions are not new ideas, although they may mean new approaches to old problems. One of the sponsors of this report expressed disappointment that the interviews and study of investment trends had not produced more new ideas or, at least, more sparks to illuminate the way. We are, however, in a period of difficult passage from one era to another, in which both the old and the new are suspect and planners proceed cautiously, adapting to fit the ever-changing present. It is not that there are no great ideas; it is that we are in a period of carrying out the hard work of trying to cook over a new fire.

PART II

TRENDS IN INTERNATIONAL COOPERATION

IN

EDUCATION

A. The Goals

If the slogans of the 1960's were universal primary education, manpower planning and investment in human capital, the slogans of the 1970's are basic education, learning while earning, lifelong education and aptitude testing instead of examination. (Blaug, 1977, p. 5).

UNESCO as Pacesetter

Emphasis in education shifted from purely a formal-system orientation in the last decade to one which increasingly included non-formal, vocational programs. In part, this is a result of the 1972 UNESCO report, Learning to Be, and the 1974 Resolution of the Member States of the United Nations which called for the establishment of new international economic order.^{2/} During the last three years, each of the major international institutions involved in education development has entered a phase of serious goal reassessment. While their ultimate changes in policy direction have been predominantly the result of internal institutional decisions, the philosophical leadership of the United Nations, with its stress on human rights and equality of opportunity as well as the translation of those ideals into educational policy guidelines by UNESCO, should not be underestimated. Certain of those UNESCO initiatives are described below.

Learning to Be is the 1972 report of the International Commission on the Development of Education, established by UNESCO and chaired by Edgar Faure. The conclusions of the report, based on worldwide study of the history of education and recent findings of educational research, were summarized in a series of twenty-one guiding principles and resolutions for educational policies which included lifelong education as the keystone of the learning society, implying as well an educational function for business, industrial and agricultural firms, the multiplication of educational institutions in order to be more accessible and offer more diversified choices, especially through less formal structures; the development of education for pre-school age children as a major objective, universal basic education which is theoretical, technological, practical and manual, vocational training aimed more at equipping students to adapt themselves to a variety of jobs than at narrow preparation for a given trade; diversification of the post-secondary educational system; evaluation which measures an individual's progress as well as his conformity to externally fixed standards; adult education as the culmination of the educational process with literacy training only as a means to the end; intro-

2/ The Member States of the United Nations in the Sixth Special Session of the General Assembly proclaimed their "united determination to work urgently for the establishment of a new international economic order based on equity, sovereign equality, interdependence, common interest and cooperation among all states, irrespective of their economic and social systems, which shall correct inequalities and redress existing injustices, make it possible to eliminate the widening gap between the developed and developing countries and ensure steadily accelerating economic and social development and peace and justice for present and future generations". (quoted by Amadou-Mahtar M'Bow, Director General of UNESCO, in the forward to Moving Towards Change, 1976, p. 9).

duction of new technologies to promote self-teaching and wider communication of information; a re-structuring of the teaching profession, including a change in training to include a first, accelerated stage followed by in-service training cycles; and active participation of all learners in the entire educational enterprise (Faure, 1972, pp. 181-234).

Moving Towards Change (UNESCO, 1976) reiterated Learning to Be's criticism of the introduction of the industrialized nations' educational systems into developing countries as "being adapted neither to the cultural environment nor to the social and human setting" (Faure, 1972, p. XXII) and proposed ways of broadening the scope of education and directing its course so that the people of each country would be involved in their own development processes (Annex C, recommendations from Moving Towards Change). In particular, the recommendations emphasized realignment of educational policies with the general development effort, remodelling of present systems to fit the realities of each country, preparation of curricula related to work and the linking of productive work with education, and the eradication of illiteracy. The appendix to the document concluded that two main hopes pinned on education - improvement of social opportunity and of work prospects - have been greatly frustrated in the last decades and that it "must be admitted that if educational services were distributed on a more equitable basis a correspondingly greater number of suitable jobs would have to be made available, and this would in the main only be possible in the context of a very different pattern of economic development" (Moving Towards Change, UNESCO, 1976, p. 124).

It is this last admission that defines the chief difference between goals for education in the late sixties and the late seventies. Disenchantment with education as a force by itself in creating a new social and economic order has led to a recent emphasis on integration of education with other development efforts and on the complete restructuring of existing systems away from an elitist, university orientation and towards a basic human needs orientation.

These themes are apparent in the changing educational policies of many developing countries and in the goal statements of international donor institutions. A paper presented at the UNESCO International Conference on Education held in 1977 traced the major trends in education from 1974 through 1976. The paper concentrated on four aspects of the search for a new international economic order (1) the relationship between education and development, (2) educational reforms which attempt to change systems for greater equity and efficiency, (3) linkages between educational institutions and the communities which they serve; and (4) the impact of basic

principles of international understanding on national education policies and the goals, content and methods of education (UNESCO, "Major Trends in Education", 1977, p. 1). This view of development departs radically from the situation of dependence inherent in earlier development patterns which were dominated by the idea that the cornerstone was growth based on models taken from the industrialized countries. According to the new concept, economic, social, cultural and political elements must be united in a single comprehensive action effective at the international, regional, national, local and individual levels (UNESCO, "Major Trends in Education", 1977, p. 3). The report stressed the necessity of creating a change in social and economic structures so as to provide for more equitable internal distribution of resources.

National Trends in Education

The major trends in education identified in the UNESCO study included: (1) reform and revitalization of traditional education and training systems; (2) a quest for both quality and cost-effectiveness; (3) democratization and equality of opportunity in education; (4) decentralization and consequent community involvement in the management of education and regional and local planning; (5) expansion of pre-primary education, especially in the OECD countries, as a means of reducing the inequalities of educational opportunity; (6) re-structuring and expansion of the period of compulsory schooling, often combining the primary cycle (6 years) with the preparatory cycle (3 years); (7) increasing links between education and world of work in both secondary and higher education; (8) changes in the methods of selecting and training teachers to become increasingly specialized; (9) a growing interest in educational research; and (10) increased attention to non-formal education for the out-of-school adult and youthful population (UNESCO, "Major Trends in Education", 1977, pp. 5-19). It is worth noting that these trends were identified from Member States' responses to UNESCO questionnaires as well as from country policy statements. The link between the 1972 recommendations of the Faure Report and subsequent country trends seems to be clear. A correspondence can also be seen in the goal statements and resource allocations of the international institutions involved in education developments, although other critical aspects of the New International Economic Order have yet to be accepted fully by the major industrial powers.^{3/}

3/ Acceptance of the definition of the new international economic and social order as one in which developing countries are partners rather than dependents is best expressed in the following excerpt: "The words 'educational cooperation for development' are used to describe the flow of educational resources...between the developed and developing countries. The word 'cooperation' implies equal partnership, mutual responsibility, and common interest and rightly has replaced for some years old expressions based on conceptions of tutelage and the notion of aid as charity". (Phillips, 1976, p. 3)

World Bank Goals and Policies

The World Bank (IBRD/IDA) describes its educational policies as a reflection of over-all policies which include "an increasing concern with the problems and needs of low-income countries and the promotion of development strategies to improve the well-being of the lower 40% of the population through increased productivity and employment and income distribution". The guiding principles for educational development include minimum basic education for all; selective provision of education and training beyond the basic level; comprehensive national education systems which embrace formal, non-formal and informal education; and equalized educational opportunity in the interests of increased productivity and social equity (World Bank, 1974, pp. 6-7). In poorer countries, basic education, rural training and further skills development are expected to receive emphasis.

Ford Foundation

The Ford Foundation states that its program priority should be to help develop a national capacity for analysis that can be applied, on a continuing basis to persisting or changing sets of problems...and facilitating the diffusion of the results and communication among individuals working on the same problems... in current jargon 'capacity building' and 'networking' are key strategies.

To enhance the possibility within a society to perceive problems and to create alternatives is, by one definition, to foster 'development'. In that sense, our support for educational research takes development as its goal (Ford Foundation, 1977, pp. 2-4).

The Foundation has moved over the past ten years from a diffuse range of interests in education in Latin America and the Caribbean to a concentrated focus on educational research. The turning point seems to have come in 1970 as the result of a conference on the educational experience in Latin America held in Buenos Aires. The conference was a wide-ranging exploration of educational problems and solutions in Latin American education. The participants included an impressive array of Latin American authorities on education who recommended new directions for investment in education. This conference made a strong case for education

research, but especially for training within the developing region, a policy which ran counter to the Foundation's existing practice of providing support for research and training programs at U.S. universities.^{4/}

The 1972 Bellagio Conference, co-sponsored by the Foundation, resulted in the publishing of the papers prepared for the meeting under the title Education and Development Reconsidered (1974) and, subsequently, the commissioning of a book on external assistance to education, Educational Cooperation Between Developed and Developing Countries (1976). Both works reinforce the arguments for assistance to strengthen a country's internal capacity for reform by means of institution building.

Inter-American Development Bank

The Inter-American Development Bank's policy regarding loans to the education sector has been in part dependent on its administration of the Social Progress Trust Fund, which specifically mentions financing of facilities for advanced education and training related to economic development as one of its four primary fields of activity (IDB, 1978, p. 5). In 1965, however, the range of operations of the Bank's Fund for Special Operations was widened to include not only higher education, but also teacher-training and para-professional, technical, and apprentice training in several fields considered important to economic and social development. In the absence of specific guidelines on investment in education, the Bank adopted an interim policy in 1972 which specified that:

1. the overall lending level in the field of education should be increased;
2. preference should be given to the less developed countries of the regions;
3. the Bank should encourage sectoral planning in the member countries;
4. the Bank should develop its own strategy for investment in education;

^{4/} As of September, 1979, a report of that conference was scheduled to be held in Santiago, Chile in early 1980. Plans include bringing together not only senior research personnel but also policy-makers to discuss successes and failures of research in the seventies and to chart new directions for the eighties. The conference will be sponsored jointly by Ford, AID, OAS, IBRD and IDRC.

5. Bank resources should be applied to critical points in education systems; and
6. the Bank should explore the feasibility of relying more on the technique of multi-institution loans (IDB, 1978, p 8).

These objectives are substantially the same as those expressed in the Operating Policy adopted by the Bank in 1976, although sector studies, technical cooperation and equal education opportunities are given special emphasis in the latter document. A recent internal evaluation^{5/} proposed the following for priority consideration as a focus for the Bank's education sector activities:

1. action-oriented education sector studies in countries where they are needed;
2. higher education focused on urgent development needs, especially short-term training;
3. middle-level education focused on technical/vocational projects;
4. primary-level education only in rural areas; and
5. equal opportunity at all levels for lower income groups.

Organization of American States

The OAS guidelines for assistance to education were originally influenced, as were those of AID, by the Charter of Punta del Este (1961) which established the Alliance for Progress. The Inter-American Council for Education, Science and Culture (CIECC) directs assistance to education primarily through the Regional Educational Development Program (PREDE) in the areas of curriculum development,

^{5/} The Group of Controllers of the Bank's Review and Evaluation System prepared a report on IDB operations in the education sector (July, 1978). The report was the most complete and comparatively objective review of policies and their relationships to investment patterns of all the institutional papers studied for this report.

educational planning and administration, educational technology, technical education, adult education and research, and dissemination of information and materials.

In the future, PREDE expects to be focusing a great deal of attention on non-formal systems of vocational training and on the need to coordinate the vocational training provided by the ministries of labor, agriculture and industry and by autonomous training institutions. Within the General Secretariat of the OAS, assistance in this field will be carried out jointly by the Executive Secretariat for Economic and Social Affairs and the Executive Secretariat for Education, Science and Culture (OAS, September 15, 1977, pp. 59-60).

The program guidelines for the 1980-81 Regional Educational Development Program call for recognition that education is an integral part of the process of development, constantly interacting with the other social, economic, scientific and technical systems. It also reaffirms the goal of equal educational opportunities. The primary educational agents are seen as family, school informal education, and mass media. Three general programming areas are defined.

1. promotion of access to education for all segments of society;
2. strengthening of the agents and tools involved in the educational process; and
3. promotion of qualitative change and educational innovation.

In defining these areas more specifically, the OAS document makes it clear that priority is to be given to those programs which aid people in rural areas and disadvantaged urban areas, and, in general, those persons outside the traditional school system. New ways to reach pre-school age children were mentioned as a specific priority.^{6/}

^{6/} For a detailed discussion of OAS program objectives and the need for integrating education and other development activities, see the Final Report, XXI Regular Meeting of CIE, April 27, 1978, and "Social Development and Inter-American Cooperation", Provisional Executive Committee of the Trade Union Technical Advisory Council, September 15, 1977.

Inter-American Foundation

The Inter-American Foundation was established by Congress in 1969 (Public Law 91-175). Its objectives are: to strengthen the bonds of friendship among the peoples of this hemisphere; to support self-help efforts designed to enlarge opportunities for individual development; to stimulate and assist effective and even wider participation of the people in the development process; and to encourage the establishment and growth of democratic institutions, private and governmental, appropriate to the requirement of the individual sovereign nations of this hemisphere (IAF, January, 1977, p. 1).

Because the Foundation does not direct its activities through the usual government-to-government channels but rather through private groups and action programs with commitments of local resources and some form of beneficiary participation, its goals in the area of education are not as specifically defined as those of the other donor organizations. Instead, definition of program goals is left to the participant/beneficiaries and education or learning is seen as an integral part of the entire process, though some projects may have more of an emphasis on what is traditionally thought of as education than others.

The Foreign Assistance Act of 1969 does mandate the Foundation to support activities which would increase food production, develop agriculture, improve conditions relating to health, housing, trade union development, employment and education; to increase the general economic level of people; and to increase their opportunities for individual development (IAF, They Know How, p. 63). These goals are described as "Standard of Living Gains". A similar list of goals called "Social Gains" is directed at changes in the beneficiaries' social, economic, and political standing, briefly defined in terms of access, leverage, choices, status, critical reflection capability, legitimation, discipline, and creative perceptions.^{7/}

^{7/} For a more complete description of these goals and their their interpretation and use in evaluation, see They Know How, 1977, pp. 75-129.

U.S. Agency for International Research

The United States Agency for International Development (AID) formulates its specific goals in the area of education and human resources in the light of overall U.S. foreign assistance policy as expressed in the Foreign Assistance Act promulgated annually by the U.S. Congress. An important document is the 1969 Report of the House Committee on Foreign Affairs, which reviewed and reiterated the education goals of the Alliance for Progress: to eliminate adult illiteracy; to assure, as a minimum, access to six years of primary education for each school-age child in Latin America by 1970; to modernize and expand vocational, technical, secondary and higher educational and training facilities; to strengthen the capacity for basic and applied research; and to produce the competent personnel required in rapidly growing and diversifying societies. Subsequent analysis of these goals made clear the impossibility of their attainment within the given time-frame, particularly the primary education target.

By 1975, AID was functioning under a new mandate from Congress to design and carry out projects which would affect directly the "poor majority":

It is AID policy...to help less developed countries (LDCs) provide, particularly their poor majority, with knowledge, skills, and orientation to enhance the quality of their lives and enable them to participate more fully in, contribute more effectively to, and receive more benefit from national, economic, and social growth (USAID Circular A-90, 2/18/76).

The importance of focusing on the needs of the poor is also apparent in subsection (b) of Section 105 of the Foreign Assistance Act:

...assistance provided under this section shall be used primarily to expand and strengthen non-formal education methods, especially those designed to improve productive skills of rural families and the urban poor, especially at the primary level, through reform of curricula, teaching materials and teaching methods, and improved teacher training and to strengthen the management capabilities of institutions which enable the poor to participate in development (Section 305, International Development and Food Assistance Act, 1975).

An AID policy paper on education and human resources, currently in final draft form, indicates the shift in priorities over the past decade from exclusively formal education to a mix with non-formal activities. The goal of the Agency's education policy is to expand and improve: (1) poor children's access to basic education and (2) poor adults' access to training in basic life skills which are essential to the successful performance of family, societal and work roles. The strategy for achieving these goals emphasizes improving access, relevancy, equity, community participation and cost-effectiveness in the specific areas of basic education and adult education.

Non-formal education is to be centered on adult education, though some non-formal activities will also be used in basic education. A primary concern is with integration of adult education with programs in health, agriculture, family planning and employment generation. The ultimate objectives of such programs are reduction in infant mortality, fertility and morbidity; increases in agricultural productivity; expansion of rural off-farm employment opportunities; and involvement of local communities in the development process.

Although basic education and adult education are the primary goals expressed in the policy paper, three other areas of policy change are treated in the paper: support to higher education, administration, and recurrent cost-financing. Higher education is to be supported only insofar as projects directly relate to basic human needs objectives. In addition, AID support of activities in higher education must not adversely affect the flow of funding to lower levels of education, must be the best alternative for meeting the specific manpower requirement, and must make a major contribution toward overcoming inequities in the distribution of higher educational opportunities for the poor and women.

AID activities in administration and management are to take the form of training for managerial and administrative staff. Again, such support is to be provided in cases where provision of training will result in significant improvement in managerial and administrative competencies, will open up such positions to women and the poor, will enhance the participation of target or client groups, and will be most cost-effective, i.e., in-service and on-the-job training.

The established AID policy and practice on local cost-financing under normal circumstances does not permit funding of recurrent costs. However, the new policy statement allows for the application of criteria which would define certain exceptions where AID would be prepared to consider post-project development funding of recurrent costs which the country is unable to bear in the short run.

Overall, the suggested new policies for education support are based on an underlying assumption of an integrated approach to development which requires the coordination of planning in all sectors. It also implies a firm commitment to community participation on the part of the host country.

B. Allocation of Institutional Resources

The stated goals of each of these donor organizations reflect over-all changes in development policies. Allocation of resources to programs embodying these goals is a good partial measure of the relative priority of each goal and makes the definition of real versus expressed goals clearer. This section examines patterns of education expenditures in developing countries worldwide and in Latin America and the Caribbean in particular.

The main sources of educational cooperation for development are official aid from government to government (bilateral), aid from inter-governmental agencies such as UNESCO and the World Bank (multi-lateral) and support given by non-governmental organizations and philanthropic sources such as the Ford Foundation and religious and other private voluntary groups.

In 1973, somewhat over half of the total amount of world education aid came from bilateral sources, with nearly a quarter each from non-governmental groups and multi-lateral funders (Phillips, pp. 9-14). Of the world total, Latin America received the smallest portion and Africa the greatest, about three-fifth, due largely to assistance provided by European powers to their newly independent former colonies.

Of a total \$1,142 million in bilateral assistance to education in 1973, France provided 51 percent, Germany 13 percent, the United States 8 percent, the United Kingdom 7 percent, Canada 5 percent, with the remainder coming from other Development Assistance Committee members of the OECD countries. If percentages of total official bilateral aid allocated to education is taken as a measure of commitment to education as a means of development, it is worth noting that France dedicated to education the highest percentage of the total (37.1), followed by Norway (28.3), Netherlands (15.3), New Zealand (14.4), United Kingdom (14.0). The United States had the third lowest allocation to education at 3.1 percent (Phillips, p. 65).

Problems of Resource Allocation by Country

Among the developing countries, Latin America and the Caribbean receive a relatively small share of available external support for education. While world trade and political factors may influence this, one additional factor is the prevailing ambiguity as to how to categorize countries as developed or not.

The Development Assistance Committee of the Organization for Economic Cooperation and Development (OECD) employs a classification system based partly on GDP per capita, but which also reflects factors such as national literacy, mortality rates, and levels of industrialization.^{8/} The United States Agency for Arms Control and Disarmament, in publishing an analysis of World Military Expenditures and arms transfers for the period 1967-1976 classified developed countries as "all those in NATO except Greece and Turkey; in the Warsaw Pact except Bulgaria; in Oceania except Fiji and Papua, New Guinea; and Austria, Finland, Ireland, Japan, South Africa, Sweden and Switzerland. All other countries are classified as 'developing' " (USACDA, p. 20). AID, on the other hand, in recent years have distinguished between developing and least developed countries primarily on the basis of GDP per capita. The United Nations employs a similar measure for assistance. The OAS has worked out a weighted system based on economic and social indicators for assistance. The OAS has worked out a weighted system based on economic and social indicators for determining the relative development of each Member State. In final decisions, innumerable other fiscal and political considerations may intervene to influence the extent, direction and timing of development assistance through bilateral, multi-lateral and governmental sources.

An important consequence of the emphasis given to per capita GDP as a measure of development is that many Latin American and Caribbean countries currently participate very little, if at all, in international assistance programs in education. This may be true even though functional literacy, employment, nutrition and other socio-economic development indicators for those countries may be very low. Moreover, in countries where income distribution is extremely skewed in favor of industrial or agricultural elites, large pockets of poor people are deprived of basic social services, including access to complete and relevant education.

^{8/} Recently, some attempts have been made to develop other measures of the physical quality of life. The OECD has developed a Physical Quality of Life Index based on about 100 indicators. Jan Drewnowski, as part of his work in the U.S. Research Institute for Social Development has also published work on this subject. (cf. works cited in bibliography.)

Education Support in Latin America and the Caribbean

International assistance to education in Latin America and the Caribbean by the seven principal donor agencies for the period 1968 - 1978 appears in Table II-1. As will be noted in the figures, although UNESCO has been influential in the setting of global goals for education cooperation among the international agencies, it is obvious that the weight of investment by the Inter-American Development Bank (IDB), the World Bank (IBRD), and AID has been extremely important in regional education planning. In the last four years for which information is available, the average yearly allocation of funds by the major institutions for education development has totalled \$150 million. Of that figure, 43 percent has been contributed by the IDB, 32 percent by the IBRD and 18 percent by AID, with the remaining 7 percent scattered among the other four institutions (see Table II-2).

In looking at these figures, it is important to remember that the higher levels of funding from the IDB and IBRD represent, to a large extent, major loans involving costly construction and equipment. The Ford Foundation has stressed research grants, the Inter-American Foundation (IAF), small community self-help projects; UNESCO, administrative reform and research; and the OAS, research and small-scale technical assistance. AID funding has been a mixture of grants and loans which have ranged from innovative research and development programs in such areas as the effective use of communications media in the formal (Nicaragua mathematics projects) and non-formal (Guatemala Basic Village Education project) systems to school reconstruction programs in the wake of natural disasters.

Graph II-1 illustrates visually the pattern of international funding by agency and year during the 1968 - 1977 period. It becomes obvious that funding by agency for the three largest donors varied widely by year, which fact is attributable both to agency changes in policy and to the often cumbersome mechanics involved in loan and grant funding (with two to three years not an usual time-frame from project conception to obligation of funds). The overall composite trend in international funding to education continues to be on the rise, although since the mid-seventies AID's contribution has tended to be on the descent.

It is generally acknowledged that for a period of time an informal agreement existed whereby each of the three principal funding institutions had a specific area of operation and was more

or less responsible for one level of the countries' educational system, i.e., primary, secondary/vocational, or university, although there is no indication that this informal agreement extended to levels of funding. Since the shift in the goals of those agencies to emphasis on the "poorest of the poor", even this informal mechanism has ceased to exist and duplication of efforts has begun to appear.

II-1 INTERNATIONAL ASSISTANCE TO EDUCATION IN LATIN AMERICA AND THE CARIBBEAN
BY DONOR INSTITUTION AND YEAR (U.S. \$ MILLIONS), 1968-1978 (years available)

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
AID	62.1	18.2	99.4	32.9	39.8	22.7	21.7	41.5	12.0	19.0	3.0 ^{1/}
IAF					(- 7 year total - 19.0)					5.2 ^{2/}	
IBRD/IDA	9.1	28.2	15.0	25.9	0.0	20.6	68.2	35.5	35.0	59.0	33.7 ^{3/}
IDB	9.6	16.9	13.2	29.4	33.7	90.9	19.0	70.8	82.5	92.2	N/A
OAS	N/A	N/A	N/A	N/A	-----5.3-----3.0-----			4.5	2.3	4.9 ^{4/}	
UNESCO/UNDP	N/A	3.8	1.3	2.0	1.6	4.1	3.2	6.4	2.1	2.4	N/A
FORD FOUNDATION	N/A	N/A	0.66	1.29	0.89	1.27	1.37	0.94	0.79	0.86	0.78 ^{5/}

^{1/} Projects approved as of February, 1978; however, AID's request to Congress for FY 78 (ending September 30, 1978) for Education and Human Resources Development was for \$32 million.

^{2/} Seven year total and 1977 estimate are derived from annual reports and an internal document which estimates that 32 percent of all IAF funding is for projects with a major emphasis on education. Available IAF reports are not easily disaggregated by year, country or type of project.

^{3/} Projects approved as of June 30, 1974.

^{4/} Prior to 1976, the OAS reported for 2-year periods. In 1976, a calendar year-fiscal year was adopted and subsequent reports were on a yearly basis.

^{5/} Ford Foundation programs in educational research and development in Latin America and the Caribbean include assistance to U.S. institutions. However, only assistance to LAC institutions is included in this table.

N/A Information not available.

Sources: See notations Table 2, Part II.

Table II-2

INTERNATIONAL ASSISTANCE TO EDUCATION IN LATIN AMERICA AND
THE CARIBBEAN 1973, 1974, 1975 and 1977

(in US \$ millions and as percent of yearly total)

	1973		1974		1975		1977	
	\$	% of total						
USAID ^{1/}	22.7	15.6	21.7	18.2	41.5	25.8	19.0	10.5
IAF ^{2/}	2.7	1.9	2.7	2.3	2.7	1.7	5.2	2.9
IBRD/IDA ^{3/}	20.6	14.2	68.2	57.3	35.5	22.1	59.0	32.6
IDB ^{4/}	90.9	62.6	19.0	16.0	70.8	44.1	92.2	51.0
OAS ^{5/}	2.8	2.0	2.8	2.3	3.8	1.7	2.3	1.2
UNESCO/UNDP ^{6/}	4.1	2.8	3.2	2.7	6.4	4.0	2.4	1.3
FORD FOUNDATION ^{7/}	1.3	0.9	1.4	1.2	0.9	0.6	0.9	0.5
TOTAL	145.1	100	119.0	100	161.6	100	181.0	100

Sources:

^{1/} Based on USAID Bureau for Latin America and the Caribbean statement of loan implementation and disbursement progress, February, 1978, and an LAC internal document "AID Financial Assistance to Education in Latin America, Grants and Loans", by Helen Ortiz.

^{2/} Estimated from four IAF reports: 1977 Annual Report, They Know How, 1978. First steps, 1971 - 1973, and an internal document estimating the percent of total projects having education as the major objective.

^{3/} Based on World Bank office memoranda to regional education division heads, August, 1977 and July, 1978.

^{4/} Derived from a "Report on IDB Operations in the Education Sector", July, 1978, Annex A: Statistical Tables of Evaluation. Note, education includes science and technology projects in IDB education finance reports, science and technology are not included in education for the other institutions.

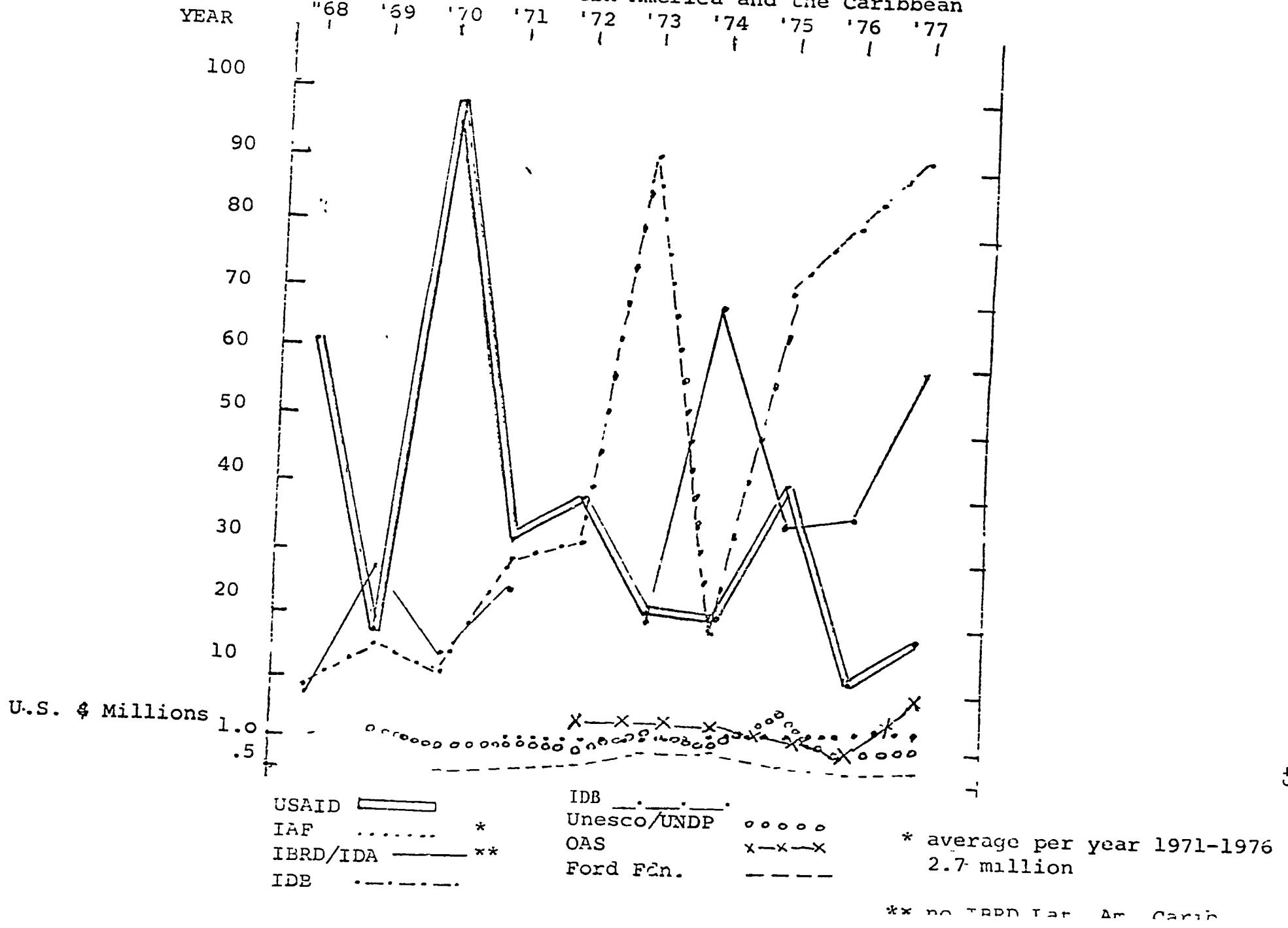
5/ Derived from OAS/CEPCIECC final reports for the years 1975, 1976 and 1977. Reporting systems varied widely from year to year, as noted in the annexed supporting tables.

6/ Source: UNDP Compendia of Approved Programs for the years 1968 - 1977.

7/ Source: Committee Report, Office for Latin America and the Caribbean, "Budget Planning for FY 78-79 Biennium, Ford Foundation", January, 1977.

GRAPH II.1

Investment in Education in Latin America and the Caribbean



C. Allocation Priorities

Both the World Bank and the Inter-American Development Bank recently analyzed their respective expenditure trends. The World Bank reported that the share of its expenditures which are allocated to primary and basic education worldwide had increased to 40 percent of total lending by 1977, while the share of intermediate education dropped to 41 percent and that of higher education dropped to 19 percent of the total. The trend for the share of construction was downward, while that of technical assistance was upward (Annex A, Table 1). An examination of IBRD loans for Latin America and the Caribbean for the period 1975 through 1978 showed non-formal education receiving the largest share, 41 percent; while secondary education drew 30 percent; primary education 26 percent; and higher education only 3 percent of the total. While technical, agricultural, and teacher training curricula received 49 percent, general education continued its 48 percent share of the total, greater than worldwide averages. In Latin America and the Caribbean, 19 percent (Annex A, Table 2) of expenditures went to technical assistance as compared to only 14 percent worldwide. ^{1/}

Through 1970, the Inter-American Development Bank's support was closely tied to higher education, with 86 percent of the total funds for education allocated to this level (IDB, 1978, p. 6). During the following seven years, the IDB granted three loans (or identifiable portions of loans) for rural primary education, and part of another loan for urban primary and general (i.e., not vocational) secondary education, consistent with the new policy guidelines. The share for higher education decreased to 37 percent of the total, while middle level technical and vocational increased by 4 percent, primary and secondary by 6 percent and assistance for science and technology increased 30 percent (IDB, 1978, p. 14).

Assessment of Assistance by Program

Emphasis in project spending by program among the international donors proved to be a difficult area to assess. With the exception of the IBRD and IDB studies mentioned above, expenditure records are seldom kept in a form sufficiently disaggregated to be useful for

^{1/} It should be noted that while these figures may well be indicative of changes, totals from a three-year period cannot be considered a true trend study.

identifying trends. An examination of project budgets, item by item, would yield such information, but time and resources available under this contract did not allow for such detailed study.

Instead, indirect measures, which could be gleaned fairly readily from available data, were used. Even here, the task was a lengthy one and the originally planned aggregation of institutional patterns in order to generalize program emphasis could not be carried out due to the difference in the format in which data was presented by each organization.

AID, for example, had identified the program elements ("program identifiers" in the annexed tables) for each grant or loan, but the data available gave no indication of the proportion of funds allocated for each element. However, it was possible to prepare simple frequency charts from those project descriptions which were available and to determine a discernible trend over the years. Primary education continued to be the most frequent area of AID assistance to education, although the number of adult and non-formal education programs more than doubled in 1975 and 1976. Management training and administrative reorganization were other areas frequently mentioned.

Specific school curriculum assistance was centered on generalized, comprehensive programs, although agricultural training and health-related subjects have recently received increased attention. Likewise, technical assistance for program-related research and evaluation appears to be on the rise. Only one project over the ten-year period specifically mentioned pre-school education (see Annex A, Table 11).

As stated above, an historical analysis of project indicators shows World Bank emphasis to have been on intermediate or secondary education while Inter-American Development Bank programs have been directed to higher education. Although new goal statements by both lending institutions focus on the "poorest of the poor," analysis over time continues to show the weight of investment in the above-mentioned areas.

Taken as a whole, frequency analysis of program elements of the major donor institutions indicates pre-school education as an almost completely neglected area. In contrast, it has become an important concern in the stated goals of UNESCO, host country goal statements, as well as revised OAS education priorities which see pre-school education as a possible means of improving pupil educational attainment and retention during the school-age years. Moreover, it is seen as a means of educating parents along with the children and as an efficient combination of health, nutrition and cognitive development programs.

Concentration on the Poor Majority

In their policy and goal statements, every institution studied expressed a commitment to development cooperation which would give priority to the least developed countries, or, if not exclusively to the least developed countries, then to the poorest members of the population within those assisted. Given these goals, it would be expected that the highest levels of assistance would be found in countries with the lowest levels of development. Table II-3 and the accompanying Graph II-2 give some indication of the real situation in international assistance and how it very often cannot or does not correspond to stated goals.

In Table II-3 countries are rank-ordered according to development indicators and international assistance levels, with lower numbers indicating highest levels of development and assistance. The table lists 24 Latin American and Caribbean countries grouped by region, even though not all countries are included in the projects of all institutions. The same figures are illustrated in Graph II-2.

The most important theme in educational development in the latter half of the seventies has been concentration on the "poor majority" or the "poorest of the poor." As the international donor agencies have sought a manner to define this group, numerous methodologies have emerged. Since the purpose of this study is not to enter into polemics concerning "how poor is poor," it has selected one set of indicators developed by the Organization of American States which compares selected socioeconomic factors with the level of international assistance received by Member States (OAS, 28 July 1978, p.82).

The factors involved in the process of grant and loan funding for education by the international donor agencies are extremely numerous. The single most important of these in the countries where AID currently operates (generally, those with the lowest per capita incomes), is the lack of absorptive capacity of host governments due to their institutional capabilities, very small populations, or their inability to meet loan repayment schedules in the face of growing debt service ratios. Other major considerations of a political nature are support or withdrawal of support to governments brought to power by revolution, successive political instability which makes the 2-2½ year lead-time of the major donors impractical, and, most recently, human rights considerations. At times of major disasters such as earthquakes and hurricanes, many of the above considerations may be waived in the name of humanitarian assistance for such programs as school reconstruction and maternal/child-feeding. Regarding those countries which AID terms "graduate" some, including Mexico and Argentina, have chosen to utilize short-term commercial lending from abroad. In contrast, Brazil has chosen to continue to borrow heavily from the international donors, its assistance amounting to nearly 30 percent of the total between 1968 and 1977. An unusual case has been that of Venezuela with its recent spectacular cash flow due to petroleum resources, placing it in the position of lender to other Latin American countries.

TABLE II-3

Table of Development and Assistance Levels,
For Latin America and the Caribbean¹ (24 Countries)

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	Development Rank ²	International Assistance Rank ³	Literacy Rank ²	University Enrollment Rank ²
Barbados	14	22	1	21
Dominican Rep. .	15	6**	16	10
Grenada	18	23	2	21
Haiti	23	16	23	20
Jamaica	13	10	3	17
Trinidad & Tobago	10	15	5	21
Costa Rica	11	13	8	11
El Salvador	19	4	20	17
Guatemala	16	3	21	12
Honduras	22	6**	18	20
Mexico	4	20	13	3
Nicaragua	17	12	19	15
Panama	9	8	11	12
Argentina	1	17	4	2
Bolivia	21	7	22	9
Brazil	3	2	17	1
Chile	5	5	7	7
Colombia	7	1	9	5
Ecuador	12	11	13	8
Guyana	*	21	*	*
Paraguay	20	9	10	16
Peru	6	14	15	4
Uruguay	8	19	6	14
Venezuela	2	18	12	6

¹ All rankings are uniform, that is, lower rank = higher level of development. For example, Brazil ranks third highest in development level, second highest in level of development assistance from international donors, seventeenth in literacy, and highest in university enrollment.

² Based on 1978 OAS rankings by social and economic indicators base of 1973-76 available statistics (see Annex A, Table 12 and OAS CEPPOSATE, 1978, p. 82).

³ Based on average of rankings of USAID, IDB, IBRD and Unesco assistance levels (see Annex A, Tables 3, 4, 5, 6).

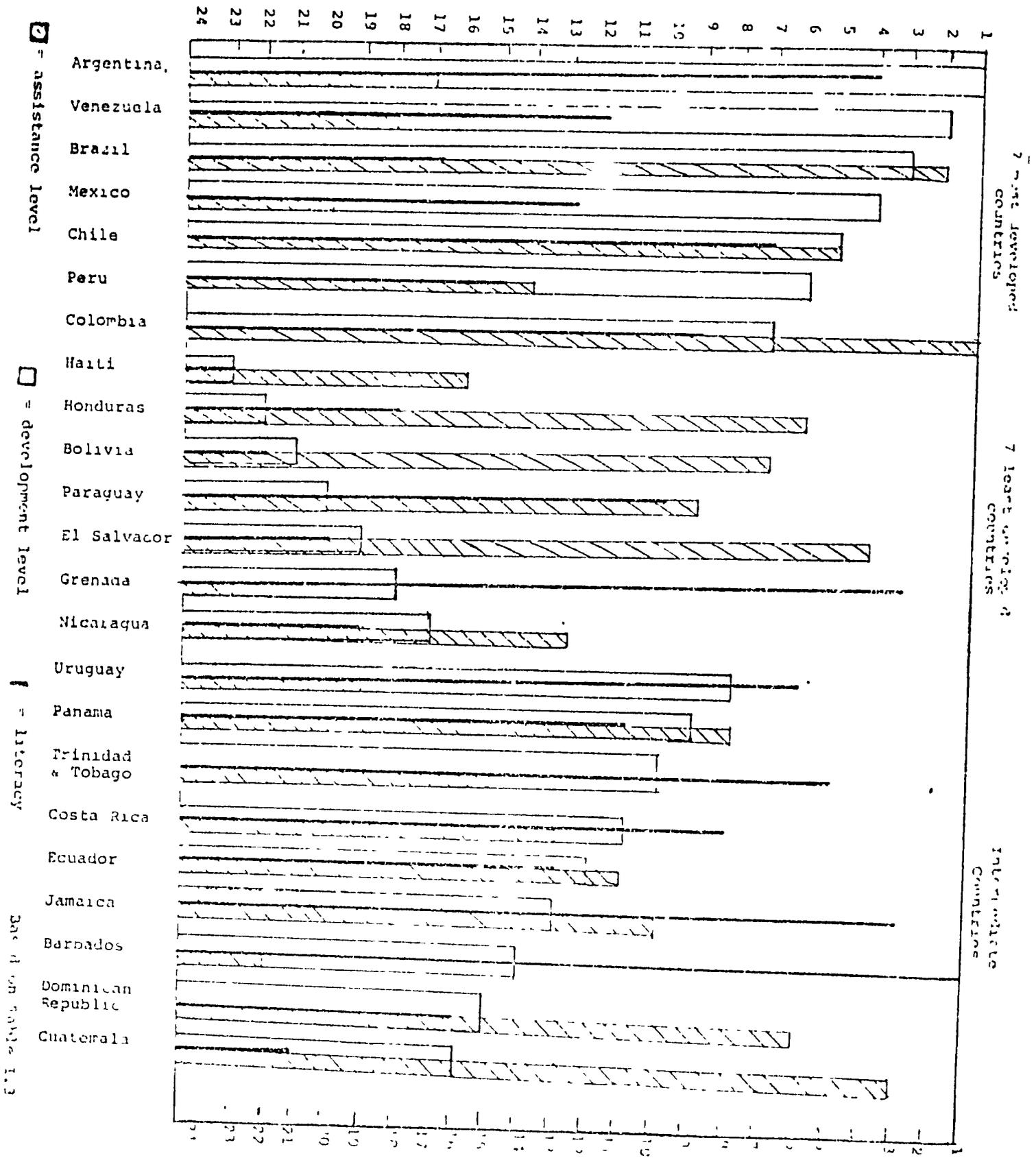
* not ranked by OAS - ** same average rank

Table II - 4
INTERNATIONAL COOPERATION IN EDUCATION IN IAC BY COUNTRY AND
BY YEAR 1968-1977 (USAID, WOPRIF BANK, UNDP, IDB)
(U.S. \$,000)

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	COUNTRY TOTAL	% OF TOTAL
Barbados					2,800				6,600		10,200	.88
Dominican Rep.		.299	1,750	18,300		1,391	99	8,158	3,936	800	34,313	2.98
Grenada						170			98		268	.02
Haiti		144			69	251			5,665	10,277	16,406	1.42
Jamaica			4,745	13,500	13,100	100	9,100		5,900		46,845	4.07
Trinidad & Tob.		9,400			6	9,300		400			18,712	1.62
Costa Rica			18	3,550	35	6,611	3,546		154		29,737	2.58
El Salvador	1,900	13,336	2,000	8	4,020		17,000		293	15,500	48,375	4.21
Guatemala	8,600	6,443	3,459		184	10,000		434	297	9,350	66,232	5.76
Honduras	2,800			6,800			90	17,625	19,831		32,675	2.84
Mexico				162	8	221	14,883		7,061	750	20,483	1.78
Nicaragua	4,250	154		90	5,300	1,110	9,000		92	20,000	30,904	2.68
Panama		3,400	8,500	1,400	9,339		350	23,990	11,000		46,999	4.09
Argentina		12,337						682	20		13,367	1.16
Bolivia	3,354	91				4	44		298	2	57,369	4.99
Brazil	32,000	79	52,358	8,507	28	56,735	9,650	7,424	2,048	34,802	335,890	29.23
Chile	16,300	1,363	8,592	11,600	34			73,500	60,173	52,510	37,889	3.29
Colombia	6,600	17,679	21,500	21,468	31,400	10,571	22,445	1,705	5,675	9,269	148,312	12.90
Ecuador	5,100	1,597	79	2,600		240	1,212	5,778			16,606	1.44
Guyana								1,000			1,000	.08
Paraguay		358	4,200	2,100		5,941	345	518	4,601	12,000	30,063	2.61
Peru				93	1,928	44	24,000	2,437	1,011	204	29,707	2.58
Uruguay			4,500			2	480				4,982	.43
Venezuela		187			50	32,543					32,829	2.85
Caribbean Reg.								8,500		880	9,380	.81
Central Am. Reg.					5,067				200		5,267	.45
South Am. Reg.			15,171		1,312	3,131		1,345	2,059	750	24,188	2.09
Year Total.	80,904	66,867	126,902	90,174	75,100	138,365	112,244	154,170	136,768	167,504	1,148,998	99.85*

Source: Derived from Tables 34.6, 6, in Statistical Annex A

GRAPH II-2



See also Table I.3

D. Future Trends

If the recent trends in funding by the international agencies continue into the 1980s, certain changes in the configuration of education in Latin America and the Caribbean are to be expected. The World Bank and the Inter-American Development Bank have continued over the past few years to decrease assistance to formal education programs at advanced levels, while increasing attention to primary or basic education oriented to basic life needs and vocational (employment) related training. AID has entered a general downward trend in its assistance to education in Latin America and the Caribbean, but it continues to concentrate on similar non-formal approaches to basic adult education and on formal primary systems, particularly in the rural areas. If these policies remain constant and prove successful through host country cooperation, significant changes are to be expected in the 80s in education. Some of these new directions are discussed below.

1. Redefinition of Post-Secondary Education

As enrollment ratios increase and dropout and repetition decrease at the basic level (which now ranges between 5 and 9 years), pressures on the secondary level will increase substantially. Decisions, often politically motivated, will have to be made as to who can enter and which "track" (university-bound or technical/vocational) the individual student will take. The post-secondary level may become even more complex than it usually is.

While no LAC country is currently contemplating abandonment of its formal school system, there is a general feeling that present structures have not served the best interests of the country and the individual. The chief disaffection is with the present pyramidal structure of the system, which culminates in a costly university system with extremely high internal inefficiency, low percentage of the university-age population actually served and, above all, the increasingly high unemployment or subemployment of its graduates which may be attributed either to factors in the national economy or to poor planning (cf. Part III). These concerns are shared by the international institutions whose studies have confirmed the high individual but low social rate of return of university education, and the ever-clearer evidence that university costs are eating into funds critical to the expansion of universal basic education.

Prevailing value systems have attached a great deal of prestige to the standard university degree, bolstered by the apparently higher positions and salaries of university graduates. This value is not likely to change, but the behavior of students could change. They could, for example, opt to work after graduation from vocational or semi-professional training programs, assuming jobs of sufficient salary or benefit were available. The trend on the part of the international institutions to increase assistance to vocational training programs within secondary education and "carreras cortas" at the university level is aimed at increased employment and a reduction of demand for traditional university education. This will not be true, however,

if the skilled trade wage-scale does not offer sufficient incentives to graduates of vocational or trade school programs, or if other incentives such as affordable housing, job security, and health care are not increased for the middle-level worker. These concerns were mentioned frequently in the course of the interviews and are also appearing more often in economic analyses of development problems.

Only the OAS has continued to maintain its level of assistance to higher education in the form of scholarships for advanced study-- 23 percent of total projects from 1972 to the present (Annex A, Table 8). About 7 percent of World Bank projects have been in higher education over the entire period studied, but since 1975 none of the projects have been higher education projects (Annex A, Table 9). The IDB had an overall level of 42.6 percent of its projects in higher education, including student credit projects which are directed mainly to university level education. Since 1975, 31.5 percent of the projects have been in higher education (Annex A, Table 10). AID had 25 percent of its projects directed to higher education during the period studied, but since 1975 only 13.3 percent have been directed to that level (Annex A, Table 11). Although there is a clear trend away from support to university education, in late FY 79 AID approved a \$4.8 million four-year project in "Training for Development" which will provide professional training in such development fields as health and nutrition, education, rural development, energy, population, environment, appropriate technologies, and development planning.

Student credit programs and scholarships have been a major part of IDB and OAS programs in the past and AID is currently contributing to such programs, though on a relatively small scale. The trend toward emphasis on forms of higher education other than traditional university programs--i.e., sophisticated skill training options--may mean less support for student credit programs which are directed purely toward academic university education.

One important consequence of the trend away from traditional university education may be a reduction in funds available for university-conducted research. Again, with the exception of the Ford Foundation which continues to support research efforts by higher-level educational institutions--albeit at a much reduced level in the LAC area in recent years--, university research receives little support from international sources. A cursory survey of project reports indicates that research projects sponsored by international institutions are carried out either by U.S. or European-based institutions and consultants or by in-country research centers which are not necessarily university connected.

A final consequence of decreased support for universities may be the elimination of many of the now inefficient schools. This may, in fact, be beneficial but it should be kept in mind that the large universities of the more developed countries (eg., Brazil, Colombia)

have been the primary beneficiaries of foreign assistance (IDB, 1978, p.10). Much remains to be done in building up the universities of lesser developed countries in the critical fields previously mentioned. This is of particular importance in the areas of applied science and technology if the university is to provide trained persons to teach in the new technical/vocational programs being planned and if there is to be skilled middle-level manpower for the other sectors of the economy.

2. Private Sector Involvement in Education

The private sector's role in education may increase substantially if the cooperation between business, industry, and school systems referred to in the plans of many host countries and international organizations occurs. The role of national and international private voluntary organizations may also increase, given the emphasis on community involvement and non-formal education, with which such groups are usually associated. At the same time, many governments are also adopting or considering the adoption of the community-based style of implementation of their programs.

A possible trend toward more, but smaller loans and grants can be inferred from data available. This would make it possible for the international institutions to cooperate with smaller, non-governmental organizations. However, the usual pattern of large loans and grants has a long-standing precedent and many of the political constraints mentioned above may make such a change on a major scale, difficult for the international donors to manage. At present, only the Inter-American Foundation and Appropriate Technology International (ATI) specifically emphasize assistance to non-governmental groups. USAID makes grants to private voluntary organizations, but these grants do not amount to a substantial percentage of overall development assistance.¹

3. International Program Coordination

Management and coordination of programs by the international donors is another possible problem area if the present trend toward similarity of goals and programs among institutions continues. Duplication of effort has already begun to become apparent. Although in some countries and in specific development areas very close collaboration has been possible among the major donor organizations, in other countries the lack of communication among representatives both in-country and in Washington has proven embarrassing at best. This leads inevitably to a need for formalized cooperative procedures either/or by country or area of concentration, in order to achieve the goals and project purposes for which all of the donors are striving.

¹ Cf. Part III on the role of the private sector in education in Latin America and the Caribbean.

Many countries are realizing that sector studies and plans must not be separated from the overall development plans for a country or sub-region. The World Bank and AID have carried out or supported sector studies for a number of years. The IDB is being urged to make such studies. Given the cost of a thorough study which assesses needs, resources, problems, and alternative plans, it may prove to be a needless duplication of effort for each institution to sponsor its own sector studies, particularly given the congruence of goals among host country and donor institutions.

4. Disparities between Goals and Activities

A comparison of institutional goals and expenditures indicates that there is a substantial time-lag involved in a change in goals manifesting itself in major new programmatic expenditures. More often than not, the new goal requires increased expenditures, while former programs may continue to be funded at the same levels, if not for the same percentage of the total, at least for a few years. This pattern is evident in the case of emphasis on meeting the needs of the poor majority. The more developed LAC countries have continued to receive more foreign assistance from international donors than the less developed countries due principally to their greater absorptive capacity.

E. Conclusions and Recommendations

The most noteworthy trend in international institutional cooperation in education for development is their increasing similarity of purpose. Several primary goals are common to all the institutions studied:

1. Commitment to the promotion of universal basic education through both formal and non-formal means.
2. Concentration on the poor majority, particularly in rural areas.
3. Increased interest and support for non-formal approaches to education.
4. Increased concern that projects be related to other development efforts in related sectors.
5. Concentration on employment-related education efforts, primarily at the secondary and adult-education levels.
6. Diminishing emphasis on higher education.
7. A nascent tendency to move away from capital investment projects such as those involving a great deal of construction toward providing technical assistance and materials and equipment.

Recommendations based on this first section are derived from the gaps identified:

1. Pre-school education programming should be further investigated to determine if this area should indeed be a priority and what type of programming is most effective, and if there is a demand on the part of the host countries.

2. Coordination of planning should be assured in some systematic way at the level of international donor headquarters and at the country level, as well as inter-sectorally. The four most influential institutions should initiate this effort, enlisting the support of the other institutions involved.

3. AID should attempt to arrive at a method of defining level of development which would take into consideration a greater number of indicators. It is not likely that all the institutions could agree on a single definition, but GDP per capita appears to be an insufficient criterion.

4. A study of the extent of private involvement in education is urgently needed if non-formal programs carried out by non-governmental entities are to continue to be promoted. This could well be a major area for inter-institutional cooperation.

PART III

HOST COUNTRY INVESTMENT IN EDUCATION: GOALS AND TRENDS

PART III

Host Country Investment in Education: Goals and Trends

This section is based on host country documents, sector reports, analyses carried out by individuals and institutions, and interviews with various government officials and other experts. The country-specific information is used to identify general trends; exceptions are noted where necessary.

The most evident trends are toward:

- (a) limited relative growth in education budgets as a percent of central government budgets;
- (b) continuing unequal distribution of resources by level and geographic area;
- (c) increased emphasis on private voluntary organizations, particularly at the level of technical/vocational education and training;
- (d) efforts toward "nuclearization" in order to maximize utilization of scarce public resources in the rural areas;
- (e) renewed commitment to primary/basic education, including adult education and pre-school education;
- (f) initiatives toward the integration of education programs with those of other development sectors, notably health, agriculture, and labor, as well as cooperation with industry and business; and
- (g) increased emphasis on student loan programs, not only for traditional higher education but also for secondary education for the poor, and innovative short-term post-secondary programs.

Closely integrated with the above-mentioned trends and of significant emphasis in conversations with regional education planners, was the need for: (1) improved or modernized (often decentralized) administrative systems; (2) investment in research on low-cost educational delivery systems; (3) research on teacher training; and (4) community involvement in educational planning and decision-making.

A. Limited Future Growth of Education Budgets

The national resources available for financing education as a percentage of national budgets are unlikely to increase in years to come, given the needs in other development areas. An assessment of those needs and present distribution of budgetary funds by country at this time is difficult to obtain, although until recently, it was available through

the Organization of American States. The annual Country Review documents of the Member States, prepared by the Inter-American Committee of the Alliance for Progress (CIAP),¹ had such information available and this was incorporated into the documentation for the regular meetings of the IA-ECOSOC. The surveys reported demographic growth, trends in internal migration altering the structure of the labor force, agrarian reform, education, housing, community development, and social security, plus a detailing of the expenditures budgeted by the various government entities for social development and the contributions of external financial organizations to it. Unfortunately, this survey is no longer available through the OAS, and the gap has yet to be filled by any other compendium of information, although sectoral studies carried out by the World Bank and AID include some information of this type, albeit on a disaggregated basis.

It is difficult to draw definite conclusions as to the proportion of government expenditures which goes to education. In 1976 the regional average was 23 percent of the budget (USACDA, 1978, Table I), but this may not reflect the total picture. For example, certain of the larger countries such as Brazil and Venezuela have federal governmental systems. Their central budgets do not reflect, therefore, large allocations by their governments to education. Simultaneously, much of the extension services of Agriculture Ministries, Health Ministries, and other government social service agencies should be considered non-formal education. In other cases where large initial central budget allocations to education may appear, these may end their fiscal years with sizeable "transfers" from education to other branches of the government.

One recent example for which reliable data is available is that of the budget of El Salvador for 1977. Social development programs represented 37.6 percent of total central government expenditures, 22.8 percent being for education and the remaining 14.8 percent was distributed among health, social assistance, labor/social security, and housing programs. Infrastructure development was allocated 18.2 percent of the budget; production development in the areas of agriculture, industry and commerce, tourism and services received only 9.7 percent (USAID/El Salvador Development Assistance Program, 1978).

Although it is recognized that emphasis must be placed on social services such as education and health, it is obvious that without economic development which creates jobs, education cannot contribute to national economic growth. In a striking "chicken-or-the-egg" situation, without an educated, trained workforce, such development is severely constrained. It is for this reason that education planning not be carried out in a vacuum or that it be seen as competing for scarce natural resources. Although a great deal of verbiage has been produced on "integrated development," with rare exceptions the true role of education as the connector among all development efforts has been recognized. If such efforts are to come to fruition, this role of education must be realized.

¹ As of 1977 the Country Review documents ceased to be carried out annually and now are being prepared by the OAS on an ad hoc basis only at the request of Member States.

B. Unequal Distribution of Education Resources

The question of equity in education is often restricted to examination of budget allocations. Data gathering at present, however, is usually limited to budgetary distribution by level. Good disaggregated data, breakdowns on a rural/urban basis, by sex, regions within countries, and on the basis of wealth of students' families, are difficult to obtain. In only a few cases is it possible to examine, as well, the resource allocations in urban and rural areas and in private and public sectors. As one Peruvian researcher suggested, allocation by level is only a surface examination of educational inequities and does not really address the question of allocation of resources to assist the poor.

The data available for this study indicate that in 1965 current expenditures for higher education in Latin America and the Caribbean represented 24.2 percent of all education expenditures. By 1975 they were 35.3 percent, and are projected to reach 43.3 percent by 1985. Secondary school expenditures, on the other hand, decreased by a small percentage (IDB, 1978, p.23). It is in primary education, however, where there is cause for concern. Expenditures at that level decreased from 48.6 percent in 1965 to 39.7 percent in 1975, and are expected to drop to 31.1 percent by 1985. Meanwhile, the primary school-age population continues to expand. Even though the percent of school-age persons not served by the schools decreases every year, the expanded population means that in many countries the absolute number of children not in school is increasing (cf. AID/FI Salvador Education Sector Analysis, 1978; OAS/CEPCOSATE, 1977; Solari, 1977; and UNESCO, Development of School Enrollment, 1977).

The pattern of expenditures by level of education varies from country to country. Some of this variation is evidenced in Table III-1. Although the span of years is not the same for each country, the general trend is evident. Expenditures for primary education are decreasing as higher education expenditures increase. Chile is perhaps the most extreme example, where higher education's share of the budget almost doubled over a ten-year period and both primary and secondary education suffered reductions. Colombia, on the other hand, increased spending in the areas of primary and secondary education and reduced the allotment for higher education by more than half, in part due to the effect of ICETEX, the Colombian educational credit institute established in 1950.

Although the data for Table III-1 did not give an urban/rural breakdown, one other trend in distribution of resources is discernible: expenditures for adult education through Education Ministries are universally low and do not seem to be increasing, in spite of the fact that many countries' educational plans include adult education or literacy programs. However, as stated before, often expenditures in the non-formal area are marked within other government agencies.

TABLE III-1

Public Current Expenditures on Education, Percent Distribution Comparison by Level of Education, by Country, and Years Available

Level Country /years	Primary	Secondary	Higher	Special	Adult	Other
Barbados	'70 34.7	34.9	na	na	2.3	10.8
	'73 32.2	33.8	na	na	1.9	10.8
Grenada	'65 90.5	comb.	6.2	na	na	na
	'73 84.6	comb.	7.6	na	na	na
Haiti	Not Available					
Jamaica	'65 49.4	27.9	9.9	--	--	2.3
	'74 39.3	31.6	18.6	0.4	3.3	1.5
Dominican Republic	'66 44.88	15.6	25.4	--	1.3	1.2
	'72 38.6	21.6	25.8	--	2.1	1.1
Trinidad & Tobago	'65 54.2	24.6	11.4	--	0.3	0.6
	'70 52.5	25.9	12.1	0.1	0.4	0.6
Mexico	'65 42.2	12.5	12.7	--	0.3	0.9
	'74 51.2	25.5	11.7	0.2	0.5	3.5
Costa Rica	'65 60.4	16.7	11.5	--	--	0.3
	'70 51.2	18.9	10.5	--	--	--
El Salvador	'65 66.6	9.5	11.6	0.3	1.4	6.8
	'70 57.9	11.8	21.4	0.1	--	2.4
Guatemala	'67 56.3	16.2	12.3	0.8	1.5	2.8
	'71 58.2	17.0	12.7	0.2	1.3	2.4
Honduras	'65 71.1	15.2	10.3	--	--	0.8
	'70 64.2	15.4	12.2	--	0.7	1.0
Nicaragua	'65 60.9	17.3	7.1	0.1	1.0	--
	'71 63.1	17.7	11.6	--	1.6	--
Panama	'65 51.6	23.5	9.9	0.4	0.1	4.1
	'74 37.7	23.1	11.9	1.4	1.1	16.3
Argentina	'65 49.8	23.9	16.9	--	--	--
	'74 32.0	23.4	18.9	0.5	2.7	2.0
Bolivia	'65 56.4	16.3	17.9	--	--	4.3
	'74 64.4	13.4	5.2	--	2.3	--
Brazil	'73 45.5	16.9	23.6	--	--	--
Colombia	'65 39.6	13.2	24.5	--	--	1.7
	'73 44.2	22.0	10.5	0.5	0.1	0.1
Chile	'65 35.7	17.9	25.6	--	3.2	--
	'74 23.5	10.1	49.9	3.3	0.2	--
Ecuador	'65 41.3	21.1	32.3	--	2.0	--
	'71 45.1	41.9	10.7	0.7	0.7	--
Paraguay	'66 68.2	16.0	15.0	--	0.2	0.6
	'73 56.5	15.1	17.9	--	1.3	--
Peru	'65 41.8	18.8	13.5	--	--	0.1
	'74 40.0	21.5	15.7	0.7	3.3	0.9
Uruguay	'65 44.9	39.8	15.3	--	--	--
	'70 45.1	30.4	19.0	--	--	--
Venezuela	'65 43.2	19.2	19.7	--	1.9	8.9
	'73 33.8	23.4	31.3	0.2	1.1	4.7

Source: Unesco Statistical Yearbook, 1976.

Note: Because the time period compared is not the same for each country, the figures are not strictly comparable, but the general trend can be determined. Country percentages do not total 100 percent because non-distributed funds were eliminated from the table.

In addition, the old inequalities seem to have continued between rural and urban, public and private, and basic and higher education. The urban/rural indicators are: comparative levels of literacy; school repetition or dropout rates; the number of primary school grades available for rural children; physical condition of schools; preparation of teachers; provision of funds, schools, and teachers in proportion to the school-age population by area; and availability of higher levels of education.

In some countries, educators offered strong arguments against complete state subsidy of higher education, based primarily on the small percentage of the population served by the universities and the high rate of return to the individual, as opposed to a low social return resulting from traditional university-level education. This, of course, was in addition to the very high unitary cost of university education. Admittedly, in all education systems the per-pupil cost of advanced education is greater than per-pupil costs at lower levels, but extreme differences are common to many Latin American countries and constitute one of the major inequities of the education system (cf. Table III-2 for LAC rates of growth).

The Latin American Institute for Economic and Social Planning (ILPES) studied the problem of financing post-secondary education in Costa Rica and noted similar inequalities. The study suggested increased use of student credit programs, but also noted that the level of intermediate education would have to be improved if post-secondary schools are to successfully carry out the scientific and technological training needed for Costa Rica's development. Improved intermediate education requires teachers better trained in the sciences, which is the task of the universities. Training abroad was suggested as one means of providing the post-secondary system with the professionals it needs and breaking the cycle of inferior university and secondary education (Costa Rica, ILPES, 1978).

In short, in the many countries where higher education has come to account for more than a third of all educational expenditures, the public education system has found itself unable to reach the goal of universal basic education (Solari, 1977, p.79).

C. Private Investment in Education

Private investment in education includes formal schooling and non-formal education programs.¹ Some of the persons interviewed felt private education

1 The terms "non-formal education," "formal education," and "informal education" used throughout this report are defined according to Coombs (1974) and Solari (1977) as follows: Non-formal education is any organized, systematic educational activity carried on outside the framework of the formal system to provide selected types of learning to particular sub-groups in the population, adults as well as children; formal education is synonymous with schooling; and informal education is the residual category which includes all the remaining ways of learning.

TABLE III-2

Total Enrollment in Latin America and the Caribbean by Level of Education
during the Period 1960 - 1975

Level of Education	Number of Pupils Enrolled				Average Annual Rates of Growth		
	1960	1965	1970	1975	1960-65	1965-70	1970-75
Primary	27,588	36,192	47,143	57,213	5.6	5.4	3.9
Secondary	3,186	5,228	7,793	12,151	10.4	8.3	9.3
Higher	572	914	1,637	3,451	9.8	12.4	16.1
Total	31,346	42,334	56,573	72,815	6.2	6.0	5.2

Source: UNESCO, Development of School Enrollment: World and Regional Trends and Projections 1960-2000.
(Table 1, p.10, 1977).

reinforced class distinctions and many felt that state support should not be provided to private schools. Yet, in a number of countries almost half the enrolled students are in private schools. Pre-school education, particularly, is largely private, as is a large percentage of secondary education. However, assessment of the impact of private education in terms of absorbing the state costs of schooling was not possible from the data available.

Private education usually brings to mind church-related schools or elite institutions for the very rich, but several Latin countries have a fairly well-established system of "workers schools" which are financed by factories and businesses for the benefit of workers' children. In Peru, for example, economic support for such schools is required by law. In other cases, unions provide schools for members' children. Colombia's "coffee schools" are public schools financed by the coffee growers' organization and are generally considered rural school show-pieces (Colombia: Los Sistemas Educativos, 1974).

The ambiguous role of the private sector is even more evident in the trend toward vocational education and non-formal education. While non-formal education programs are included in almost all national education budgets, many non-formal programs are carried out outside of the public school system. These programs encompass on-the-job training conducted by private industry, basic literacy and numeracy skills programs of church groups, cooperatives and credit unions, and other self-help community groups as well as private voluntary organizations and the various skills training components of other sectoral development projects in agriculture, industry, construction, and the like.

Although the argument is frequently advanced that non-formal education is less costly than formal, it should be noted that most of the cases cited to substantiate this contention rely on mainly voluntary services (Solari, CEPAL Review, 1977, p.83). This is both the great strength and disadvantage of private voluntary organizations--they are less costly than formal programs, but difficult to replicate and maintain on a self-financing basis.

The Inter-American Foundation, which works almost exclusively through private channels, divides private development groups into two types:

Developmental Organizations which range from national level conglomerations which can include, for instance, an independent, yet program-coordinating radio school, a national development foundation, a rural credit union, and a research entity, to local-level campesino-organized agricultural service centers. This generic category also includes small groups of highly educated professionals who provide technical services, and associations of traditional community authorities.

Church-related organizations account for the second main type of organization, by the directly-related appendages, or individuals or groups now completely independent and autonomous from the hierarchy. (They Know How, 1977, p.27).

Unfortunately, even within the host countries accurate, comprehensive information about the private sector is seldom included in analyses of education efforts. By their nature, such private non-formal education programs tend to be small-scale and unless they have been so successful that they have attracted the attention and perhaps support of the public sector, they are frequently overlooked as unimportant influences in education and development. Still, the cumulative effect of large numbers of such small programs may be greater than is at first imagined.

A survey of the sections on non-formal education and private voluntary organizations included in USAID education sector assessments confirmed how little information is available, but gave a hint of the extent of private efforts in education. In Bolivia, for example, a 1975 study listed 62 public and private agencies carrying out non-formal education activities (Bolivia: USAID, 1975). A 1975 International Labour Organization survey in Paraguay reported 32 institutions in vocational and agricultural training and 282 low-level technical skills training programs carried out by private groups (Paraguay: USAID, 1978).

The Paraguay assessment had one of the best data bases on non-formal education of all assessments surveyed, yet the authors recommend that "a useful data base should be built" (Paraguay: USAID, 1978, p.167). They suggested a data base which is not so much a descriptive inventory as a supplier of information on the organization, management, delivery systems, financing, costs, benefits, outcomes, and impact of such programs.

The other assessments concentrated on a few notable programs without attempting to make any comprehensive list of other smaller programs. The conclusion of the Panama Assessment (1975) is illustrative of the general state of affairs:

Other non-formal education programs are offered by private industry, through religious organizations, national and international agencies, and other special interest groups. No comprehensive listing of non-formal courses or programs is available and no agency of government is responsible for developing, maintaining, or disseminating such information. (Panama: USAID, 1975, p.41).

The range of programs mentioned in the assessments gives some idea of the magnitude of what is labeled non-formal education:

- In Bolivia (1975):-
- The Bolivian Radio Schools (ERBOL) sponsored by the Catholic Church, financed by the Ministry of Education and foreign donations;
 - The Summer Institute of Linguistics, a private foundation;
 - Military education programs carried out by the Ministry of Defense;
 - Schools run by the State Mining and Petroleum enterprises;
 - Programs offered by the Ministries of Education,

- Health, Agriculture, the universities, museums, and libraries;
- Private schools which serve one quarter of the country's students.

In Guatemala (1978):- Public institutions which offer a range of skills training programs;

- Cooperatives which offer courses for members;
- The Berhorst Foundation;
- The Basic Village Education programs which are publicly-funded agriculture programs integrating the activities of several sectors and use radio technology.

In Colombia:

- The National Apprenticeship Training Service (SENA) which coordinates the efforts of government and private industry in a single program;
- ACPO (Acción Cultural Popular) which conducts radio schools and publishes a newspaper, has 20 regional offices and 450 local organizations and has the support of the government, the Church and international donors and was the result of one priest's initiative.

In the Dominican Republic: (1978)

- Radio Santa María, a church-sponsored literacy and primary school equivalency program;
- (APEC) Asociación Pro-Educación y Cultura, which is a correspondence school program.

In Peru:

- A wide-range of Ministry programs, including SENATI (Servicio Nacional de Aprendizaje y Trabajo Industrial) which is a semi-autonomous program of government and private enterprise;
- Various programs of the Catholic Church;
- ALFALIT, a highly successful adult literacy program sponsored by the Evangelical Church;
- Acción Comunitaria del Perú, a private foundation funded by private enterprise and private international foundations.

Clearly, non-formal education efforts are a substantial contribution to development activities in education, but how substantial and with what success are questions which cannot be answered given the current state of information.

D. Emphasis on Scientific, Technological, and Vocational Education

Almost every national plan for education gave some attention to the need for increased scientific, technological, and vocational education, especially at the secondary and post-secondary levels.

The emphasis was a logical one which had grown out of the concern for integrating education with other development activities such as the introduction of new industries and technologies into the national economy. Also, the high unemployment levels of secondary and post-secondary school graduates under the traditional system has led many planners to assume that the education received has not been relevant to the job market.

Some of the educators and policy-makers interviewed expressed the contrary opinion that perhaps industry and business were simply not sufficiently developed to require the educated labor. However, there are a number of manpower and human resource utilization studies which indicate that while there are labor surpluses at higher and lower skill levels, there is still a lack of middle-level skilled manpower. It may also be true that the over-educated unemployed are not those educated in the sciences but those in humanities and social studies fields.

Peru's education plan was probably the most radical departure from the traditional academic orientation of the school system. It emphasized labor-oriented training at every level, but it is impossible to determine at this point whether the programs have been successful or not, due to its youth and because of a number of fiscal and other obstacles which Peru has encountered in putting the system to work.

E. Nuclearization and the Rural Sector

Plans for "decentralization," "deconcentration," "regionalization," and "nuclearization" of educational services appeared in a number of national plans. Usually, decentralization and regionalization referred to transferring a certain degree of policy and budgetary decision-making powers to regional bodies and, from there, perhaps to local communities. The plans were part of larger schemes for regional development. Deconcentration meant the extension to rural areas of services generally available only in urban areas. Nuclearization involved the creation of centers or nuclei which were able to provide resources for a number of smaller outlying schools of which they would normally be deprived. Most importantly, the center school offered the higher grades of basic education not available in the smaller, disperse rural schools. This kind of system defined a rural area in terms of its access to services. It also depended on the formation of teams of educators who work together in a cooperative fashion. The chief advantage seems to lie in the reduction of costs through consolidation. Although such systems have been in effect in a number of countries for several years, there seems to have been little evaluation of their effectiveness, especially in terms of the usually stated goals of increasing community participation, improving curriculum and reducing costs.

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F. Integrated Education Programs

In a number of countries, educators and planners are seriously considering ways of making schooling conform more closely to national economic goals in terms of the kind of education students receive, the time spent in school, the cost of schooling relative to other social programs, and the immediate rather than long-term return to both the state and the individual.

In particular, attempts are being made to cooperate with health education and nutrition programs, with agricultural improvement programs, and with labor production needs. However, the cost-saving aspects of combining many of these programs do not seem to have been examined in depth, and more importantly, there are few examples of new administrative mechanisms to assure the implementation of cooperative plans. The move toward integrated planning is not only the result of a desire to save costs, though this is a serious consideration. Many of those interviewed felt that education systems have become isolated from the mainstream of advancement taking place in their countries, or, at least, has become out of step with technological progress. This attitude seems in contradiction of another opinion voiced that technology has not provided the answer to providing low-cost, efficient quality education.

The hopes placed in highly sophisticated educational technologies of the 60s have faded in many countries as experiments with various programs have proved not as successful as first appearances suggested. The breakthrough in technology which would transform the learning process has not occurred, as it was hoped it would in the early years of educational television and teaching machines. Nevertheless, individuals and research institutions in Latin America and the Caribbean are continuing to search for those technologies which are appropriate to the system as it exists now and which will also assist in the transformation of outdated aspects of schooling. The movement does not seem to be one of rejection of technology, but one of reassessment of what is workable in the present context and what can be developed that will be of assistance in the future.

G. Student Credit

As student credit institutions were originally conceived, they provided assistance to students pursuing higher education. The programs were successful for the most part, although many countries reported difficulties in the recuperation of loans. An increased sensitivity to democratization of education and providing access to all social classes brought with it the realization that the rural and urban poor needed assistance if they were to complete secondary school and have access to the universities and that they were not being reached by such credit programs.

Nuclear schools offering higher primary grades and secondary schooling were often located in centers far enough from the homes of rural students that they had to move to the town where the school was located. This cost, plus the income lost if the older student's labor was lost at home, made it very difficult for low-income students to continue their education. A number

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of countries are currently considering combinations of scholarships, low-interest loans and work study programs to permit such students to continue their education. Although these proposals are promising, they are risky to governments involved and may represent substantial support by the international donors if they are to become successful.

H. Renewed Commitment to Basic Education

In spite of budgetary trends to the contrary, most countries gave priority to universal basic education in their planning documents. Basic education has come to signify a realm of activities which includes formal primary education, both formal and non-formal pre-school education, and literacy and basic skills programs for adults and out-of-school youth.

Coverage of the primary school-age population (6-14) varied widely from country to country. In most cases, where primary enrollment ratios approach or exceed 100 percent, this represents a high level of "overage" students who have either entered school late, are repeaters, or have not had complete schools to attend. Coverage is more than 100 percent of that age group in some countries, far less than half in others. It should also be remembered that schools, teachers, and children are increasingly concentrated in the large urban areas.

Dropout rates also remain high, as evidenced by the sharply peaking educational pyramids seen in most country education sector assessments. (Cf. also Table III-2 for the overall primary to higher education pyramid.) High dropout rates not only increase the costs of education but also call into the question of the quality of education. Reasons for such marked dropout rates remain a question of debate. It is certain, however, that both external factors in the socioeconomic environment of the individual student plus internal inadequacies of the educational system must intertwine to occasion the phenomenon.

A frequent theme in conversations and articles about reaching the marginal population now outside the formal school system through non-formal education programs is the fear of creating two separate and unequal systems, one serving the relatively rich urban areas and another serving the poorer rural zones. In actual practice, no government has opted for non-formal programs as the sole solution to the problems of rural education. Formal education has been given the official sanction of all governments of the region and is clearly here to stay. Successful non-formal programs may or may not fall under the direction of the Ministries of Education in future years.

One final note which was not encouraging was that the definition of basic education in terms of the basic skills necessary to all citizens in order to pursue their goals of meeting their human needs, is still not clear in many countries. Curricula remain academic, oriented to passage from one level of education to another rather than to the attainment of skills and knowledge appropriate to each age level and to the local variables governing life processes. Again, there are notable experiments, but few major reforms. Acknowledgment of this problem has led many countries to attempt the integration of school goals with those of other sectors of the economy.

2. National Goals and Trends Affecting the Education Sector

In addition to the trends identifiable within education systems, there are some external national trends which impact directly or indirectly on educational planning: urban/rural growth patterns, the move to integrate planning through national planning offices, and internal administrative reform movements, including regionalization or decentralization of government.

A. Internal Migration Patterns

Migration from rural to urban areas has not slowed in Latin America and the Caribbean since 1960. If anything, it has accelerated.

Although the population continued to be concentrated in the large metropolitan centers (1 million or more inhabitants) in 1970, urbanization in those cities has reached such a saturation point that their growth has already begun to slow down in relative terms. Beyond a certain point, basic services such as water, electricity, education, sewage, and other sanitation facilities tend to deteriorate. However, it is observed that urban centers of 500,000 to one million inhabitants have become more important, while those of smaller size have shown a slight decline in their share of the total urban population, as well as in their rate of growth. This fact points to an urban/urban migratory movement of great significance, especially toward the largest centers.

Two potential educational problems can be expected from this pattern: (1) ruralization of curriculum in the rural zones will continue to be largely ineffective in keeping the population "down on the farm" and (2) urban demand for schooling is increasing at a rate much faster than the capacity to meet the demand. A reconsideration of curriculum reforms as they are presently planned in many countries seems necessary. Certainly, adaptation of curriculum to fit rural zones is important, but it is equally important that it continue to be transferable in order not to close the doors of access to higher levels of education to the rural child.

Although the availability of services is one of the attractions of the urban areas, the real magnet seems to be the possibility of employment. Recognizing this, many governments have adopted two strategies of significance to education: the first is the establishment of national planning offices, often equipped with research and evaluation teams to promote integrated development planning. The second strategy is regionalization.

The primary task of the national planning offices is to coordinate the planning efforts of the various ministries, but some offices also carry out their own planning efforts with the intention of directing the plans of the other ministries. The introduction of schools, roads, agriculture-related industries, and health services into rural areas is the most popular approach and is frequently related to the second

Table III - 3

Latin America: Urban and Rural Growth Rates and Percentage Differences, by Groups of Countries, 1960-1970

Group	Annual Increase in Population (%)			Percentage Difference Between Rural and Urban and Total Rates	
	Total	Urban	Rural	Total Rates	Total Rates
Total	<u>2.9</u>	<u>5.2</u>	<u>1.4</u>	<u>-1.4</u>	<u>2.3</u>
Group I ^a	1.8	3.0	0.2	-1.6	1.2
Group II ^a	3.1	6.1	1.5	-1.6	3.0
Group III ^a	3.0	5.5	2.3	-0.7	2.5

^aGroup I: early, high and moderately rapid urbanization (Argentina, Uruguay, Chile, Cuba);
 Group II: Late, moderately low and very rapid urbanization (Venezuela, Mexico, Panama, Costa Rica, Colombia, Brazil);
 Group III: very late, low and moderately rapid urbanization (Bolivia, Peru, Ecuador, Paraguay, Nicaragua, El Salvador, Dominican Republic, Guatemala, Honduras, and Haiti).

Source: Fernando Gatica, "La urbanización en América Latina: Aspectos espaciales y demográficos del crecimiento urbano y de la concentración de la población," CELADE. Notas de Población, Revista Latinoamericana de Demografía, Year III, Vol. 9, December 1975.

strategy, regionalization. The major fault in such centralized planning mechanisms is that they work in a vacuum, literally divorced from the realities of the projects which they are enjoined to coordinate.

Regionalization places emphasis on secondary cities as resource centers for remote areas. Some plans call for transfer of resources and decision-making power to these areas. However, a lack of trained middle-level administrators and, more importantly, a lack of budgetary allocations from the central government or of financial resources within the region itself, often hinder the execution of the plans. Finally, it is often difficult to attract competent middle or upper-middle personnel away from the capital cities.

B. Organized Labor Movements

A final national trend which affects education is the increase of organized labor movements, or unionization of teachers. In almost every interview with educators and policy-makers, teachers unions were cited as obstacles to the implementation of education reforms. Teachers' strikes are common occurrences in most Latin American countries and the opposition of teachers to a particular plan or reform can mean the failure of the plan. Although sufficient information was not available at this juncture, it is apparent that the role of the teachers' union is critical in the successful implementation of any educational reform.

PART IV

INNOVATIONS IN EDUCATION

This section will be an overview of some of the more notable recent successes and failures of attempts at educational innovation in the region. It should be noted that one of the failures of evaluation of educational projects is that it has been concentrated on the more easily manipulated facets of the formal system such as quantities of school rooms, desks, teachers, textbooks, etc., and has tended to avoid value questions such as the ultimate utility of various philosophical alternatives and the result of trade-offs in decision-making. Frank consideration of not only the economic utility of various alternatives, but the political utility and the impact on quality of education in terms of skill acquisition and social usefulness of the information and skills are necessary components of program evaluations. Research must first and foremost be of value to decision-makers, but results of most educational research are not usually couched in those terms.

Most pilot projects in education have had as their goal an improvement in the quality or quantity (coverage) of education, or some combination of both. A number of other social and political goals also enter into the reasons for experimenting with program changes. Bi-lingual programs, for example, are generally intended to enhance the self-esteem of the bi-lingual/bi-cultural person, assimilate bi-lingual speakers into the mainstream culture, and increase literacy. Evaluations of such programs, however, frequently concentrate on the cost of the program and numbers of persons participating, without assessing other goals.

A. Innovations to Improve the Quality of Schooling

The large education sector projects funded from international sources usually have a number of components designed to improve various aspects of the education system such as: quality of physical facilities; teacher training; curriculum content and materials; specific delivery systems such as radio and TV. It is difficult to isolate program components and describe one or the other as particularly successful. However, of these large projects, the World Bank's nuclear schools, the Basic Village Education project sponsored by USAID in Guatemala, and the ROCAP textbook program were mentioned most often by educators as useful, if not

always totally successful, innovations.

The Stanford Radio Math project in Nicaragua and Radio Santa María in the Dominican Republic were mentioned as examples of successful uses of radio to improve education, either in the quality of instruction or in the increase of coverage. The majority of persons interviewed, including government officials, agreed that the most successful small pilot projects seemed to be those carried out by private groups, such as the Jamaican Adult Literacy program (JAMAL), many of the radio education programs which use correspondence course methods, and the vocational education programs sponsored by private business and industry.

One interesting Ministry of Education-sponsored project that has subsequently been taken over by the teachers themselves is CIESMA in El Salvador. It is a national network of groups of teachers, organized to contribute to the permanent training and exchange of ideas regarding teaching. They meet in groups to analyze their problems and look for solutions based on their individual experiences. They have organized seminars, courses, workshops, and have also made use of newsletter, radio and television as means of disseminating the fruits of their discussions. The groups operate on minimal funding generated by themselves or sometimes through Ministry of Education funds. The enthusiasm generated by the program among teachers seems in part due to the feeling they have that it is their program, created by themselves and moving in directions they have chosen.

Twelve-month schools are also being experimented with as a means of extending coverage and reducing costs. In El Salvador, the experimental schools are also using Montessori-based individually programmed instruction in order to facilitate a student's progress through the cycle at his own pace. The hope is to gradually extend the program to other schools, but to keep the project as low-key as possible without announcing any massive changes. The caution with which El Salvador is proceeding with these two projects is understandable based on the past opposition by the teacher corps and the public to introduction of double-shift schools, educational television, and new programs of teacher-training.

Teacher resistance to change was the major obstacle to the success of new programs in every country visited. The quality and interest of personnel involved in new projects seemed to be the key to the success of many of them. In Peru, for example, the post-secondary vocational schools were evaluated by Richard Speagle, who described one of the schools as an outstanding success because of the "good management and sensitive public relations of the director"

(from the files, USAID/Peru).

The Escuelas Superiores de Educación Profesional (ESEP) in Peru are one of the most massive attempts to provide vocational training in all of Latin America. At present, the outcome of the attempt is in doubt. The schools have not attracted the numbers of students expected, in part because of the lack of prestige attached to vocational schools, and in part because the schools are still poorly equipped and not sufficiently connected with job opportunities to provide employment to graduates. At present, the cost-per-student is very high, due to lack of full-time matriculants. The Speagle evaluation included a number of concrete suggestions for solving many of the problems the ESEPs are encountering.

A recurring suggestion for vocational schools is the idea that they become semi self-supporting through production operation spin-off of the trade training students receive. The "escuelas granjas" in El Salvador are attempting a project of this sort with some small success. Formal vocational training institutions outside the regular school system such as SENA in Colombia, INA in Costa Rica and INCE in Venezuela stress on-the-job training and are typically financed largely by future employers through small payroll taxes. In many cases, there is very little coordination between the non-formal training institutions and the regular state-financed vocational schools. The private industry-financed schools, however, have more direct lines to future employment, hence are more attractive, a situation which contributes further to the low prestige of the vocational state school and ought to lead to a reassessment of that type of education as it now exists.

In a number of countries, the use of modern communications technologies has been introduced as part of educational reforms. Early evaluations of the instructional television program in El Salvador held out high hopes of increasing enrollments and allowing higher pupil-teacher ratios at lower costs. The Nicaragua Radio Math project, which began on a pilot basis for grades 1-3, was scheduled for large-scale expansion before political factors intervened. At present, there is some question as to the real effectiveness of television, given its high initial costs, but a number of other countries have been introducing educational TV in both formal and non-formal educational programs. The distance-learning programs, especially, rely on radio and TV technologies for delivery of education. Experiments in the use of satellite communications, though extremely expensive initially, may still bring radical changes to education in LAC countries.

In some instances, better use of public time on the private radio and television stations or influencing of government-owned stations to

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schedule substantially more program time for public-interest programming may be a better approach than the installation of separate systems for exclusive public school system use. Better, more efficient use of existing media resources is a theme that recurred in many of the interviews, and points up the need for improved management practices. Closer cooperation with private voluntary groups with success in radio and TV messages -- such as Radio Santa María and MUDE in Santo Domingo -- should be explored.

B. Advances in Management and Administration of Education

Most of the educational reforms introduced during the past decade have included reorganization of the administrative machinery of the education system. Statistical departments, especially, have increased in number as the need for more precise data for analyzing educational needs has increased. El Salvador's extensive Education Sector Analysis, for example, encouraged the development of a data-gathering and analysis capability within the Ministry of Education that far exceeds any capacity that existed before the lengthy study was undertaken. The result of such an increased capability has been a greater influence of research on planning and decision-making. Ministry officials now look to the research and statistics department for direction in determining the directions for long-range planning.

Improved program planning and budgeting practices have also been introduced into a number of ministries of education as a result of the current increased interest in the cost-efficiency of the school system. However, a continuing criticism of educational bureaucracies is that they are conservative, resistant to change, and so top-heavy with personnel that they frequently thwart the very reforms they initiate. It is to be pointed out that approximately 95 percent of all education budgets goes to recurrent costs (salaries).

C. Multinational Education Projects

While some communication networks exist among LAC countries, there are very few truly international educational experiments or innovations underway. The Andean countries commissioned the OAS to carry out an extensive study on the feasibility of regional educational television that could be shared by the member countries. The study, completed in 1978, considered physical feasibilities, possibilities of cooperative programming and curriculum development, and costs of such a project, but no action has been taken on it as yet.

The University of the West Indies (UWI) has experimented successfully with the use of satellite transmission of television courses to

remotely scattered campuses in several Caribbean islands and is now studying the feasibility of expanded instructional services for adults, professionals, and out-of-school youths throughout the Caribbean.

Regional research centers have contributed a great deal of original research to the solution of educational problems but the continuing problem is the funding of research and the dissemination of the results so they can be used by the planners in other countries. Planners too often find themselves spending scarce resources "reinventing the wheel". More notable than the innovative breakthroughs in education are the gaps in research and experimentation and the unmet needs in every country. These gaps and needs and the constraints to meeting them are treated in the next section.

PART V

FEASIBILITIES AND CONSTRAINTS TO MEETING UNMET NEEDS

Although each country's needs are unique to its educational development efforts, there are common problems which hold true for much of Latin America and the Caribbean. The following list is not to be considered exhaustive, but does reflect some of the most-mentioned problems:

1. to improve school efficiency and reduce waste by keeping children in school until they complete the cycle, especially at the primary level;^{1/}
2. to keep pace with population growth (currently 2.8 per year) as well as rising social demand for education while at the same time providing education for those children previously excluded from the school system either through incorporation into the formal school system or through non-formal programs for youth;
3. to continue research and development of technologies which will improve the quality of education, reduce costs, and permit more children and adults to be reached;
4. to provide schooling in basic life and occupational skills for the large segment of the adult population not functionally literate;
5. to provide quality training for sufficient numbers of teachers to meet the demand in fields most necessary;
6. to coordinate the development of education programs with planning in other sectors of the economy, especially health, agriculture, and all levels of industry;
7. to find feasible mechanisms for coordinating and funding vocational training either within or without the formal school system;
8. to find effective ways of reducing the costs of higher education while bringing enrollment in the various disciplines into greater harmony with the development needs of the country;

^{1/} The definition for "primary level" varied among LAC countries. Generally, it is defined as grade one through at least grade five with variations in what is considered the last year, ranging from grade five through grade nine.

9. to have the opportunity to experiment with adaptations of methodologies and technologies of education used in other countries through increased exchange of research information; and
10. to decentralize decision-making and encourage community interest and participation in local school affairs.

The constraints involved in meeting those needs are national constraints which vary from country to country. In addition, there are the further constraints imposed by the international donors, such as monetary lending policies, funds which are earmarked for specific purposes, and political considerations which influence decisions to cooperate with some countries and not with others. These issues are not treated here.

National constraints, generalized to the extent possible, are as follows:

1. Continued rapid population increase - Although the rate of population growth in Latin America and the Caribbean has begun to decrease in a number of countries and is projected to decrease slowly regionwide in coming years, such decreases will not have a significant effect on the demand for schooling for a number of years. Children born this year, when population growth is 2.8% annually (which means that the population will duplicate itself in twenty-two years), will not reach first grade for six to eight years and may be in the system for as long as twenty years, or well into the 21st century. Even given a continued decline in population growth rates, demand will still be on the rise and more innovative ways of meeting that demand must be met.
2. Severe budgetary problems continue to plague even countries categorized as in the middle or even "graduate" ranges of development. Allocation of resources within the education sector and among the various sectors of the economy as a whole continues to be a problem affecting the availability of resources for basic program elements such as primary education and the expansion of the secondary system to allow more equitable access to lower income groups. Funds for vital research and experimentation with new programs which might be avenues for qualitative and/or quantitative improvements in education are already almost non-existent.
3. Changes in priorities and in administrative personnel as a result of changes in government. Even in governments

where power is passed democratically, the practice of changing with each election not only key administrators but also changing key mid- and upper-middle level personnel for programs results in a waste of advanced training spent on persons who do not remain in the system and who would have been able to provide continuity.

4. The nature of educational costs is itself a constraint. Recurring costs in education (salaries, equipment, utilities, maintenance) continue to be extremely high, at the expense of investment programs which might yield more cost-effective programs.
5. Personnel management practices which exclude teachers from participation in the planning of new programs. Distrust of teachers and particularly teachers' unions is widespread and as a consequence programs are frequently announced at the last minute and teachers are expected to accept and implement them. Cost-saving practices such as double-shifting, higher teacher/pupil ratios, and the use of community education aides to substitute for teachers are often regarded with great suspicion by teachers and the consequent conflicts between administrators and teachers have blocked many attempts to introduce innovations. The utilization of the expertise of teachers throughout the process of educational reform might result not only in lessened resistance to reform but also in more effective programming.
6. The disparity between progress in science and technology and the school curriculum - This is both a problem to be resolved and a serious internal constraint to the implementation of educational programs which call for the introduction of scientific and vocational education at all levels of schooling when the teacher training institutions are ill-equipped to prepare teachers to impart this kind of education.

PART VI

AREAS SUGGESTED FOR FURTHER STUDY

It was the original intent of this report to suggest a broad outline of a design for future studies which would be most useful in educational planning in Latin America. In the course of the interviews, a number of suggestions emerged. The keystone suggestion was always the need for interchange among Latin American planners and educators so that needless duplication of experimental efforts could be avoided and useful sharing of practical approaches could take place.

Information at present lacking or inadequate includes the following:

1. disaggregated information on equity problems which would include consideration of quality of rural and urban schools, educational possibilities by sex, condition of classrooms, accessibility of resources, percent of complete schools, and budgetary allocations;
2. amplification of school mapping as a planning tool to include internal migration patterns from rural to large urban and secondary urban centers, as well as seasonal migration of labor;
3. a study of the conditions which might make non-formal education programs more cost-effective than formal systems for older children and adults. There should also be exploration of the possibilities of creating more small private voluntary programs rather than expansions of large public existing programs. Solari (77) estimates that not more than five percent of the education efforts in Latin America are non-formal and that their cost-effectiveness lies primarily in their voluntary nature and disassociation from the formal system.
4. a more sociologically-oriented investigation of the practices of teachers after they are teaching in the classroom, including the extent and usefulness of labor union membership, and outside employment which teachers may be found to hold for economic reasons;
5. the development of cost-saving administrative and managerial models and the determination of the most effective means of implementing them in individual country cases; and
6. the development of new and investigation of existing models of inter-sectoral planning.

These and other suggestions are based on the most obvious problems encountered in educational planning today. The list could be extended at length to include studies dealing with every instance of inefficiency or poor quality of education, but it is the need to focus effort that

emerged as a priority. This list is a suggested list. The final focusing and choosing of priorities should come from the representatives of the institutions and countries involved.

Part I of this study, the Executive Summary, attempts to synthesize the trends, priorities and gaps discovered over the course of this research, and to reach some basic recommendations for future policy directions.

Annex A
Statistical Tables

ANNEX A, TABLE 1
IBRD/IDA LENDING FOR EDUCATION
WORLD-WIDE
1970-1977

	(%) Actual		FY77	(%) Projected
	FY70-74	FY75-77		
By Level:				
Primary, Basic and Non-Formal	10	35	40	40
Intermediate	50	46	41	39
Higher	40	19	19	21
Total:	100	100	100	100
By Curricula				
General and Comprehensive	42	38	25	43
Technical	30	37	39	23
Agricultural	15	13	20	17
Teacher Training.	12	11	15	12
Health	1	1	1	5
Total:	100	100	100	100
By Type of Outlay				
Construction	49	49	46	41
Equipment	43	38	40	42
Technical Assistance	8	13	14	17
Total:	100	100	100	100

Note: The tables include only lending to education and training in education projects. They do not include education and training incorporated in rural development, urban, agriculture or other sectors.

Source: World Bank Office Memorandum
August 2, 1977

ANNEX A. TABLE 2
IBRD/IDA EDUCATION PROJECTS
LATIN AMERICA AND THE CARIBBEAN
(U.S. \$ MILLIONS)

By Level:		Total	
	Primary	44.7	25.5
	Secondary	53.0	30.3
	Higher	5.1	2.9
	Non-Formal	72.4	41.3
	Total:	175.2	100.0
By Curriculum:			
	General	84.5	48.2
	Technical	57.5	32.8
	Agricultural	19.9	11.4
	Teacher Training	9.1	5.2
	Management Trng.	3.4	1.9
	Health	.8	.5
	Total:	175.2	100.0
By Outlay:			
	Construction	86.9	49.6
	Equipment	55.8	31.9
	Tech Asst.	32.5	18.6
	Total:	175.2	100.0
By Sector:			
	Media	1.6	.9
	Curr. Dev.	.7	.4
	Learning Materials Production	3.2	1.8
	Planning/Admin.	7.7	4.4
	Mobile Units	.8	.5
	<u>Institutional</u> Education/Training	161.2	92.0
	Total:	175.2	100.0

Source: Education Sector, World Bank, Regional Education Division, Education Research Department, 1978

ANNEX A, TABLE 3
 WORLD BANK (IBRD/IDA) EDUCATION PROJECTS IN LATIN AMERICA AND THE CARIBBEAN
 BY COUNTRY AND BY YEAR
 (U.S. \$ MILLION)

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	JUNE 1978	COUNTRY TOTAL	RANK
Nicaragua	4.0								11.0			15.0	9
Ecuador	5.1							4.0				9.1	14
Colombia		7.6	6.5				21.2					35.3	2
Trinidad & Tob.		9.4				9.3						18.7	8
Guatemala		6.3							14.5			20.8	7
El Salvador		4.9					17.0				9.0	30.9	3
Chile			8.5									8.5	15
Dominican R.				4.0				8.0				12.0	11
Jamaica				13.5								13.5	10
Brazil				8.4				23.5		32.0		63.9	1
Paraguay						5.1			4.0	12.0		21.1	6
Costa Rica						6.2						6.2	16
Peru							24.0					24.0	5
Honduras							6.0				5.0	11.0	12
Haiti									5.5			5.5	17
Bolivia										15.0	10.0	25.0	4
Uruguay											9.7	9.7	13
Year Total	9.1	28.2	15.0	25.9	0.0	20.6	68.2	35.5	35.0	59.00	33.7	230.2	
# of Loans	2	4	3	3	0	3	4	3	4	3	4	33.	

Source: World Bank Office Memorandum, Education Division, 1978

ANNEX A, TABLE 4
IDB EDUCATION PROJECTS IN LATIN AMERICA AND THE CARIBBEAN
BY COUNTRY AND BY YEAR (U.S. \$ MILLIONS)

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	TOTAL	RANK
Barbados					2.8				6.6	.8	10.2	15
Dom. Rep.				3.4					3.9		7.3	18
Grenada											-	
Haiti										9.6	9.6	17
Jamaica			4.7						5.9		10.6	13
Trinidad & Tob.					13.1						13.1	9
Costa Rica				3.5			3.3		15.5		22.3	5
El Salvador			2.0							9.0	11.0	12
Guatemala						9.3		8.6			17.9	7
Honduras	2.8			4.8			6.7		3.0		17.3	8
Mexico										20.0	20.0	6
Nicaragua	.3					1.1	9.0				10.4	14
Panama		3.4		1.4	6.9			12.2			23.9	4
Argentina		12.0									12.0	10
Bolivia										9.7	9.7	16
Brazil						48.0		50.0	60.0	20.0	178.0	1
Chile				11.6							11.6	11
Columbia	6.6				10.9				3.1	7.6	28.2	3
Ecuador		1.5		2.6							4.1	20
Guyana											-	
Paraguay				2.1							2.1	21
Peru											-	
Uruguay			4.5								4.5	19
Venezuela						32.5					32.5	2
Carib. Reg.												
Central Am. Reg.												
So. Am. Reg.												
LAC Reg.			2.0								2.0	
Totals:	9.6	16.9	13.2	29.4	33.7	90.9	19.0	70.8	82.5	92.2	453.3	

Source: Evaluation report on IDB operations in the education sector.

Annex A, Table #1, 1978

ANNEX A, TABLE 5
UNDP/UNESCO ASSISTANCE TO EDUCATION IN LATIN AMERICA BY COUNTRY
AND BY YEAR (U.S. \$)

	1969	1970	1971	1972	1973	1974	1975	1976	1977	COUNTRY TOTAL	RANK
Barbados	-	-	-	-	-	-	-	-	-	-	-
Grenada	-	-	-	-	-	-	-	-	-	-	-
Haiti	144,390	-	-	68,750	169,540	-	-	98,320	-	267,860	17
Jamaica	-	45,050	-	-	250,750	-	-	165,159	-	629,049	13
Dominican Rep.	299,300	-	-	-	100,000	-	400,000	-	-	545,050	14
Trinidad & Tob.	-	-	5,500	6,410	1,390,757	99,000	157,000	36,330	-	1,983,187	4
Mexico	-	-	162,401	8,123	220,569	-	-	-	-	11,910	20
Costa Rica	-	47,925	50,274	34,513	411,423	246,462	292,898	91,948	-	483,041	15
El Salvador	236,083	-	8,000	20,000	-	-	292,898	154,259	-	1,239,752	9
Guatemala	143,256	984,014	-	183,700	-	90,000	433,500	-	-	697,583	12
Honduras	246,034	-	-	-	-	-	552,200	131,216	-	2,084,386	3
Nicaragua	153,656	-	90,000	-	-	-	381,100	396,335	-	1,023,409	11
Panama	-	-	-	1,189,014	-	-	-	-	-	243,856	18
Argentina	337,323	-	-	-	-	-	-	20,000	-	1,209,014	10
Bolivia	91,050	-	-	-	3,750	44,200	662,256	298,050	2,000	1,347,579	8
Brazil	79,035	7,925	106,800	27,500	606,333	-	-	47,615	101,800	240,465	19
Colombia	78,950	-	1,468,252	-	71,000	1,245,000	1,704,500	125,300	408,000	1,350,893	7
Chile	1,363,216	92,249	-	34,250	-	-	-	448,005	1,639,373	6,655,090	1
Ecuador	97,288	78,600	-	-	-	-	-	-	-	1,489,715	6
Paraguay	358,399	-	-	-	-	1,211,662	1,777,854	-	-	3,165,404	2
Peru	-	-	82,925	-	841,040	344,500	-	-	-	1,543,939	5
Uruguay	-	-	-	-	43,900	-	-	54,000	203,550	384,375	16
Venezuela	187,450	-	-	50,000	2,261	-	-	-	-	2,261	21
					43,100	-	-	48,900	-	329,450	17
Year Total	3,815,630	1,255,763	1,474,162	1,622,260	4,154,423	3,280,824	6,362,108	2,115,435	2,354,723	26,935,328	
# of Grants	25	66	13	14	24	9	16	19	8		

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ANNEX A, TABLE 6
 USAID ASSISTANCE TO EDUCATION IN LATIN AMERICA AND THE CARIBBEAN
 BY COUNTRY AND BY YEAR (U.S. \$1,000)

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	COUNTRY TOTAL	RANK
Barbados													
Grenada													
Haiti													
Jamaica										677		677	15
Dominican Rep.			1,750	10,900			9,100					9,100	9
Trinidad & Tob.										380		13,030	8
Mexico													
Costa Rica													
El Salvador	1,900	8,200			4,000				297	380	3,000	17,777	6
Guatemala	8,600		2,475			700		8,473		5,200		25,448	4
Honduras				2,000			2,133		3,665	750		8,548	10
Nicaragua					5,300							5,300	13
Panama			8,500		1,250		350	11,790				21,890	5
Argentina													
Bolivia	3,354						9,650	7,424	2,000	10,000		32,428	3
Brazil	32,000		52,350			8,129						92,479	1
Colombia		10,000	15,000	20,000	20,500	10,500			2,127			78,127	2
Chile	16,300											16,300	7
Ecuador						240						240	17
Guyana								1,000				1,000	14
Paraguay			4,200					578	601			5,319	12
Peru					1,928			2,437	957			5,322	11
Uruguay							480					480	16
Regional So. America Caribbean			15,171		1,732	3,131		1,345	2,059	750		24,188	
Central Amer.					5,067			8,500		880		9,380	
Year Total	62,154	18,200	99,446	32,900	39,777	22,700	21,713	41,487	11,906	200	880	5,267	
# of Loans/Grants	5	2	9	3	8	8	6	14	15	8	1	372,300	

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ANNEX F, TABLE 7
UNDP/UNESCO* COOPERATION IN EDUCATION DEVELOPMENT IN LATIN AMERICA AND THE
CARIBBEAN BY PROGRAM AND BY YEAR

Program Identifiers*	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	TOTALS (%)
Level: Pre-School											
Primary		2			1		1				4 3.0
Intermediate		1	3	1		1		1			7 5.3
Higher Ed.		3		3	3	4	3	2	3	1	22 16.6
Adult/Non-Formal & Specialized		1	1			4	1		5		12 9.0
Curricula:											
Basic (General & Comprehensive)		3			2	1	5			1	12 9.0
Technical/Voc. Agriculture			1	3	1	1	1		1	1	9 6.8
Teacher Training		4	2	5	2	3	4	3	2	2	27 20.4
Management/Admin. Health		14	1	4	8	7	4	5	6	2	51 38.6
Outlay: Construction											
Equipment/Matrls.			1	1	2	3			1		8 6.0
Training/St. Loans											
Technical Assis.			1			3	1				5 3.7
Research		1		1		2	1	3	1	1	10 7.5
Total # of loans		25	6	12	14	23	17	13	14	8	132

Note: More than one identifier may be used associated with a program, e.g., a grant for secondary education in a rural area to develop a vocational curriculum through training accomplished through provision of equipment and materials and technical assistance. Therefore percentages in these columns will not total 100.

Because of the disparity in methods of reporting program expenditures, no attempt was made to assign a dollar amount to each identifier. Instead, as a gross measure of the relative importance of each identifier in a given year the number of times an identifier appeared was recorded and expressed as a percent of the total number of loans for that year.

* It should also be noted that the UNDP Compendium of Approved Programs use only the briefest description of program components from which to determine what program identifiers were stressed. Projects may have included other identifiers, but unless the appropriate key words appeared in the description, they could not be included in the tally.

ANNEX A TABLE 8
OAS COOPERATION IN EDUCATION AND DEVELOPMENT IN LATIN AMERICA AND THE CARIBBEAN
BY PROGRAM AND BY YEAR

Program Identifiers	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	TOTALS
Educ. Adminl. & Plann. (BECAS)	Tech. A. Training					13		16		21	50
						22		11		4	37
Curriculum Teaching Methods & Materials	T.A. Training					13		12		27	51
						22		20		13	55
Educ. Tech. & Transfer	T.A./Support Training					13		12		13	38
						22		1		5	28
Tech. Ed. Adult Ed. Ed. Research	T.A. Training					14		12		16	42
						18		15		3	36
Prep. & Dissemination of Ed. Materials & Info.	T.A. Training					4		3		6	13
						15		12		2	29

Sources: OAS Program Memoranda 1976/82 OAS 9/v/75
Final Report: OEA/Scj/IX
CEPCIECC/Doc. 330 Rev. 1
4 August 1976

Note: OAS reporting systems make it difficult to disaggregate programs by level. The identifiers used here are those used by OAS.

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ANNEX A, TABLE 9
 WORLD BANK COOPERATION IN EDUCATION DEVELOPMENT IN LATIN AMERICA
 AND THE CARIBBEAN BY PROGRAM AND BY YEAR

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	TOTALS
Program Identifiers											
* Pre-School											
Primary							2	2	2	2	8
Intermediate	2	4	2	3		3	3	2	2	1	22
Higher		2		1		1	2				6
Non-Formal			1			1		2	1	1	6
Basic	2	4	1	2		3	3	2	2	1	20
Tech/Voc.	1	1	1	3		1	3	3	1	2	16
Agric.	1	2	2	1			2	1	2		11
Teacher-T.	2	2	1	2		1	2	1	2	1	14
Manag./Admin.											
Health											
Construction							1	1	1		3
Equip./Maint.				1					1	1	3
* Training/St. Loans											
Tech. Assist.	1	1	2	3		3	3	2	4	1	20
* Research											

* Categories not included in World Bank Program Identifiers.

Source: Education Division Office
 Memorandum, 1978.

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ANNEX A, TABLE 10
IDB EDUCATION LOANS, LAC, BY PROGRAM AND BY YEAR
(U.S. \$ MILLIONS)

	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	TOTALS	% OF TOTAL
Higher Educ. # of loans	9.65 3	1.50 1	8.50 3	22.4 5	15.6 3	42.91 4	12.30 2	50.00 2	3.90 1	9.00 1	175.76 25	38.3%
Student Credit # of loans				1.4 1	3.70 1				8.90 2	5.60 2	19.6 6	4.3
Science & Tech. # of loans						32.00 2			60.00 2	40.00 2	132.00 6	28.8
Mid-Level Tech & Voc. # of loans		15.4 2	4.7 1	5.6 2	9.4 1	16.00 1	6.75 1	20.8 2	6.60 1	20.40 2	105.65 13	23.1
Primary & Secondary					5.00 1				3.10 1	17.23 2	25.33 4	5.5
TOTALS \$ # OF LOANS	9.65 3	16.9 2	13.2 4	29.4 8	33.7 6	90.91 7	19.05 3	70.8 4	82.5 7	97.23 9	458.34 54	100%

Source: Evaluation Report on IDB Operations in the Education Sector, 1978, Annex A, Table 1.

NB: Does not quite agree with controller's report, Annex A, Table 3 because author's table was derived from list of loans by country and purpose, 1968-77 and IDB Table #3... covers only years 1971-1977.

ANNEX A, TABLE 11
 USAID COOPERATION IN EDUCATION AND DEVELOPMENT IN LATIN AMERICA AND THE CARIBBEAN
 BY PROGRAM AND BY YEAR

Program Identifiers	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	TOTALS
Level: Pre-School E									1		1
Primary P	3	2	4	1	1	1	2	4	10	3	31
Intermediate I	2	1	4	3	3	1	2	1	3	2	22
Higher Ed. U			6	2	5	2	1	5	2	1	24
Adult/Non- Formal & Special Ed. N & V			4		4	6	4	11	12	5	46
Curricula:											
Basic (General G & Comprehensive)	2	1	5	4	3	3	4	6	11	3	42
Technical/Voc. T/C			4	2	4	2	3	2	4	3	24
Agriculture A			4		3	2	3	6	6	1	25
Teacher/Train. TT	1	1	4	3	2		1	6	5	3	26
Manaq./Admin. M	1		3	2	4	7	4	7	3	6	42
Health H			3		1	2	1	5	6	1	19
Outlay:											
Construction C	2	1	3	3	3	1	3	3	4	2	25
Equip./Matrls. E	2	1	4	2	5	3	4	11	9	7	48
Training/Stu. Loans P			5	2	4	5	6	5	10	3	40
Techn. Assist. TA	1	1	6	3	6	7	6	13	12	8	63
Research R		1	4	2	2	4	5	10	7	2	37

Sources: "AID Financial Assistance to Education in Latin America, By Year, FY 1970 through 6/30/77, By Country, Project, Educational Level, Curriculum and Area of Outlay"
 H. Ortiz and AID/LAC statement of loan implementation and disbursement progress,

E


ANNEX A, TABLE 2.

Cuadro 4

VARIABLES DETERMINANTES DE LA CLASIFICACION

	PIB 1976 b/ mill. US\$		PIB por habitante 1976 b/ US\$		Export. de bienes y servic. Promedio 1974-76 mill. US\$		Porcentaje analfabetismo (cifras consales)		Esperanza de vida al nacer 1973 (años)		Matrícula universitaria hacia 1973 (miles)	
	Orden		Orden		Orden		Orden		Orden		Orden	
Brasil	1	85.632	11	777	1	12.162	17	34	11	1	638	
México	2	43.993	10	765	2	7.589	13	26	9	3	313	
Argentina	3	34.699	2	1.363	4	3.316	4	7	5	2	254	
Venezuela	4	18.457	1	1.434	3	4.993	12	24	3	6	163	
Colombia	5	11.377	16	471	8	1.590	9	19	15	5	137	
Chile	6	9.682	6	528	7	1.678	7	11	10	7	107	
Perú	7	8.027	15	497	5	2.055	15	27	12	4	151	
Guatemala	8	3.857	13	642	11	774	21	54	19	12	21	
Rep. Dominicana	9	3.117	14	640	12	759	16	33	18	10	25	
Ecuador	10	3.116	17	453	9	1.035	13	26	15	8	63	
Uruguay	11	2.763	5	993	15	540	6	10	2	14	19	
El Salvador	12	1.869	18	437	14	599	20	43	17	17	8	
Jamaica	13	1.840	7	899	10	976	3	5	2	17	6	
Paraná	14	1.752	4	1.019	20	257c/	11	22	7	12	21	
Costa Rica	15	1.681	21	291	16	498	22	60.0d/	23	9	40	
Paraguay	16	1.606	9	784	13	644	8	12	5	11	22	
Trinidad & Tobago	17	1.461	12	664	17	514	19	42	21	15	12	
Paraguay	18	1.312	3	1.133	6	1.991	5	8	4	21	1	
Paraguay	19	1.053	19	400	19	297	10	20	12	16	9	
Paraguay	20	1.047	20	378	18	340	18	40	20	19	5	
Paraguay	21	676	23	145	21	228	23	75	21	20	2	
Paraguay	22	193	8	794	22	177	1	1	1	21	1	
Paraguay	23	29	22	269	23	9*	2	26	12	21	1a/	
Promedio A. L.		10.617		785		1.865			63		95	

No hay información sobre matrícula universitaria. El dato corresponde a educación vocacional y técnica en 1972.
 Estimaciones de la Secretaría de la OEA. (Precios de 1973).

Fuente: América en Cifras
 UNESCO. En Agenda 1977; Overseas Development Council.

ente: Secretaría de la OEA - Anteproyecto de Informe de la CEPAL al CIES, 1977. IDB - Economic and Social Progress in Latin America, 1975. Secretaría
 La OEA - América Latina: Datos de Población, 1973.

Annex B

Interview Information

1. Sample Questionnaire (Spanish and English)
2. Letter of Request for Interview (Spanish)
3. Summaries of Interviews
 - Kingston, Jamaica
 - San Salvador, El Salvador *
 - San Jose, Costa Rica
 - Bogota, Colombia *
 - Lima, Peru
4. List of Other persons interviewed or consulted

Interviews in El Salvador and Colombia were considerably more extensive than in other countries.

The summaries given here are only the briefest notations of topics covered. The full summaries are available on request.

Study of Trends and Priorities in Education
in Latin America and the Caribbean

I. Purpose of Interviews: Through a series of interviews with selected leaders, planners, and policy-makers in education and related sectors in Latin America and the Caribbean, to obtain a range of opinions which will help to identify the most significant trends in education, their impact on development, and the problems which most need to be resolved. The interviews are intended to provide a broad perspective on education and development in general.

II. Questions to Guide the Discussion

--What do you see as the major role of education in development?

--Is education the main factor contributing to development? What is its role in a developing or modernizing society?

--What do you see as the most important political, social, and economic effects on national development of universal basic education?

--Have there been significant changes in education in the past ten years? What seems to be the most pressing problem today? Is this different from the situation in 1968-1970?

--What are distinctive characteristics of education in rural and urban areas that require the attention of educational leadership? How does this affect other factors, i.e. agriculture, health, income?

--What factors contribute to the generally higher costs of education in rural areas? What are the unique problems of educating the rural population?

Estudio de Inclivaciones y Prioridades en Educación
En América Latina y el Caribe

I. Proposito de las Entrevistas: Por medio de una serie de entrevistas con líderes, planificadores, y autoridades escogidos dentro del sector educativo y otros sectores en América Latina y el Caribe, esperamos obtener un rango de opiniones diversas que nos ayudaran en identificar las tendencias más significativas en la educación, sus impacto sobre el desarrollo nacional y los problemas que más requieren resolverse. Las entrevistas deberían dar una perspectiva amplia con respecto a la educación y el desarrollo en general.

II. Preguntas para Enfocar la Discusión

--En su opinión, ¿cuál es el principal papel educativo en el desarrollo?

--Como factor contributivo al desarrollo, ¿es la educación el mayor elemento? ¿Cuál es su papel en una sociedad en el proceso de desarrollo?

--En su opinión, con respecto al desarrollo nacional, ¿cuáles son los efectos más importantes de la educación básica universal? (político, económico, social)

--¿Han ocurrido cambios significativos en la educación en los últimos diez años? Hoy día ¿cuál parece ser el problema más apremiante en la educación? ¿Era diferente en 1968-70?

--¿Cuáles son las características distintivas entre la educación rural y la urbana que requieren la atención de los líderes en la educación? ¿Cómo afectan otros factores en la sociedad como la agricultura, la salud, y el nivel de ingresos?

--¿Cuáles son los factores que contribuyen a que los costos generalmente sean más altos para la educación rural? ¿Cuáles son los problemas especiales en el proceso de educar a la población rural?

--Private education serves a large proportion of the population. What impact has this had on development? On cost of education? On equity?

--La educación privada sirve a un gran porcentaje de la población estudiantil. ¿Cuál ha sido su impacto sobre el desarrollo? El costo de la educación? ¿La equidad?

--What are the relative strengths and weaknesses of private and public education?

--¿Cuáles son las ventajas y desventajas relativas entre los dos programas?

--Should private sector education efforts receive public assistance?

--¿Debería la educación privada recibir asistencia pública?

--Non-formal education has been pointed to as one alternative to the formal school system. How can non-formal education provide needed educational experiences?

--La educación no-formal ha sido señalada como una alternativa al sistema formal. En que manera puede llenar las necesidades de la sociedad la educación no-formal?

--What do you see as the major strengths and weaknesses of non-formal programs? Of formal programs?

--¿Qué considera Ud. que son las mayores ventajas y desventajas de programas no-formales y formales?

--What kinds of vocational education programs seem to be most successful? (i.e., specialized high schools, apprenticeship programs, Min. of Labor training schools, etc.)

--¿Cuáles programas en la educación vocacional parecen los más exitosos? (i.e., escuelas diversificadas, programas de aprendizaje en el lugar del trabajo, programas de capacitación laboral de los Ministerios de Trabajo, etc.)

--Have adult education programs been successful? If so, how? If not, why not?

--En su opinión han tenido éxito los programas de educación para adultos tanto formal como no-formal? Si contesta que sí, ¿cómo? Si contesta que no, ¿por qué no?

--What has been the impact of literacy campaigns?

--¿Cuál ha sido el impacto de campañas de alfabetización?

--Are there solutions or models in any countries which seem to be most effective in reducing the costs of providing universal basic education?

--¿Podría Ud. identificar soluciones o modelos adoptados por cualquier país que hayan sido efectivos en la disminución de los costos de la educación básica universal?

--What seems to be the most effective way of handling the increasing demand for secondary education?

--¿Cuál sería la manera más efectiva para satisfacer la creciente demanda para la educación secundaria?

- What seem to be the most effective ways of handling the increasing demand for higher education? --Cuál sería la manera más efectiva para satisfacer la creciente demanda para la educación superior?
- What innovation developed here or elsewhere have been most useful in terms of increasing quality and reducing cost? --Cuáles son las innovaciones más útiles desarrolladas aquí o en otra parte--en términos de la reducción de costos y el aumento en la calidad de la educación?
- What influences the applicability of these projects? --Cuáles son las influencias que afectan la aplicabilidad de estos proyectos o éstos?
- Are there programs you would describe as significant failures? --¿Podría identificar algún programa que Ud. considere un fracaso significativo?
- Are there other models you would recommend for further research? --¿Hay otros modelos que Ud. pudiera recomendar como temas para una posible investigación?
- Population growth in LAC averages 2.7%. This rate of population increase must affect a country's ability to provide universal primary education. How does a community with limited resources respond to this problem? --La población de América Latina y el Caribe está creciendo en un promedio del 2.7% al año. Un aumento de esta magnitud tiene que repercutir en la habilidad del gobierno de cumplir con la educación básica universal. ¿Cuáles son las opciones que tiene un gobierno con recursos limitados para responder al problema?
- Do planning offices have any impact on allocation of resources for educational purposes? Do school or leaders pay attention to research and planning? What factors influence the formation of educational policy? --¿Qué impacto tienen las oficinas de planificación sobre la asignación de recursos para la educación? ¿Hacen uso los dirigentes del sector educativo de los resultados de la investigación y de la planificación? ¿Cuáles son los factores que influyen en la formación de la política educativa?
- How have teacher problems affected policy? --¿Cómo y en qué medida han sido de importancia en la política educativa los problemas relacionados a los maestros?
- A large percentage of the education budget goes for recurring costs. What are the trade-offs to be considered when choosing among alternative programs? Can a Minister of Education do anything to increase the funds for education or are more funds required? --Un gran porcentaje del presupuesto educativo en todos los países se gasta en costos recurrentes. ¿Cuáles son las consideraciones de "trade-off" (o los trade-offs) cuando hay que escoger entre programas alternativos? ¿Hay algo que un Ministro de Educación puede hacer para aumentar los recursos para la educación, ó, en realidad, hay necesidad para más?
- What administrative changes do you recommend, if any? --¿Hay necesidad para cambios administrativos y de qué tipo?

DEPARTMENT OF STATE
AGENCY FOR INTERNATIONAL DEVELOPMENT
WASHINGTON DC 20523

Estimado

Esta oficina ha iniciado la primera etapa de un estudio que esperamos sea de utilidad a líderes educativos y planificadores en América Latina tanto como a las organizaciones educativas al nivel internacional. Estamos analizando estrategias y política educativa, patrones de inversión en el sector educativo llevado a cabo durante los últimos diez años con el intento de identificar áreas propicias a aceptar recursos adicionales para acelerar el desarrollo educativo.

Nuestro intento es examinar la trayectoria de asistencia tanto de la AID como otras organizaciones financieras. También creemos menester analizar la inversión por parte de los gobiernos de América del Sur, el Caribe, y América Central en el sector educativo. Es nuestro intento identificar patrones impulsivos al desarrollo, programas que han contribuido significativamente al crecimiento económico nacional, áreas no previamente consideradas y inclinaciones educativas cuyo impacto será considerable en el futuro.

Los resultados de nuestro estudio preliminar nos dará pauta para crear un modelo de estudio a fondo encaminado a direcciones actuales y futuros en el sector educativo de América Latina.

La calidad de la encuesta actual depende en gran parte de la colaboración y contribución de profesionales cuya experiencia, perspectiva personal, y juicio es altamente conocida y respetada en la comunidad latinoamericana. Su participación y contribución de ideas y recomendaciones es indispensable para lograr estos objetivos de interés común. La Sra. Paula Diebold de Cruz, está encomendada con

esta tarea especial por la Oficina de Asuntos Latino-americanos de la AID. Ella viajaba a el y permanecerá aquí días del año en curso. Reconocemos que su disponibilidad de tiempo es limitada, y le agradeceríamos si pudiera conceder una cita para entrevistarse con la Sra. de Cruz. Le rogamos nos avise por intermedio de nuestra oficina en la fecha y hora de su cita.

La Sra. de Cruz tendrá un borrador del estudio propuesto destacando los patrones actuales de inversión educativa del sector público y privado sobre el cual deseamos sus observaciones y reacciones sobre estos lineamientos, especialmente de los vacuos en el sector educativo actual y proyecciones al futuro.

Esta formulación de política necesariamente requiere la consideración filosófica y política que los datos ligeramente proveen. Por ejemplo, el concepto de la distribución equitativa no únicamente suscita las preguntas de accesibilidad--¿deben tener prioridad las escuelas rurales? -- pero también destaca la interrogativa relacionada al currículo nacional. ¿Permite el actual currículo la activa participación de grupos marginados, tales como mujeres y indígenas en la participación activa dentro del cuadro social, político, y económico del país? ¿Debería ser distinto el currículo en las escuelas rurales? ¿Cómo se considera el alto costo de educación universitaria (como un porcentaje del presupuesto educacional) con la incremental demanda social para la educación mayor e igual demanda para la educación primaria? ¿Cuáles son las tecnologías apropiadas para la educación en su país?

Estas preguntas no llegan a satisfacer la inquietud que nos promueve a discutir el tema general con Ud. Como puede apreciar, su participación en esta encuesta tendrá profundo impacto en nuestros futuros esfuerzos por lo cual agradecemos de antemano su valiosa colaboración.

Reiterándole mi sincero agradecimiento a este pedido. Quedo de Ud.

Atentamente,

Howard D. Lusk
Chief, Human Resources Development
Division
Office of Development Resources
Bureau for Latin America and
the Caribbean

SUMMARY OF INTERVIEWS IN KINGSTON, JAMAICA
September 10 through 13, 1978

Vice-Dean, School of Education,
University of the West Indies.

The interview covered a wide range of topics but was focused particularly on the problems of teacher-training. At present there is a close working relationship between the University and the University of Education, with the University supervising the work of the teacher-training colleges. In Barbados the role of the University is much the same, but in Trinidad the relationship is not so clearly defined, although the University does supervise the qualifying examinations for teacher certification. Some teacher training under UWI auspices is also carried out in the Bahamas and Belize and there are the beginnings of a network among teachers and institutions.

A present concern is the upgrading of teachers already in the system. The volume of teachers necessary to meet the pressure of population growth has made it necessary to reduce the period of training from three years to two years. The third year is now a period of internship. As yet, no accurate survey has been carried out to test the effectiveness of the two-year training program. There is no separate budget for research and education.

In addition to the problem of training sufficient numbers of teachers, there is the problem of training teachers in speciality areas, especially in rural education skills, agriculture, science, technology, and industrial arts. On the whole, teachers are generalists. The problem exists at both primary and secondary levels and

is in part related to the fact that primary teachers are predominantly women and the cultural orientation does not encourage women to study sciences, therefore few teachers have a science or vocational background.

Entrance examinations are necessary for the "old system" secondary schools, but no examinations are required for the new secondary, a situation that may be creating two separate and unequal systems, though the assurance of 70 percent of secondary places to public primary school students has meant an increase in the number of lower income students in secondary school. However, it has also meant an increase in the number of middle class students attending public school in order to gain secondary school entrance.

Teacher training schools represent an upward mobility opportunity for the working classes, therefore it is not difficult to recruit teachers, especially as the teacher training school is also a way to gain university entrance without taking the national examinations. For that reason, many students pass through the training schools only as a way to gain passage to other careers. Because teachers' salaries are not competitive with other careers, the majority of teachers are women.

The necessities of development are regarded as more important in curriculum revision than the problems of equity. There are sufficient numbers of students enrolled in the sciences to cull teachers of science from the group, but the attractiveness of other jobs and especially of migration prevent many from choosing to teach, especially at the primary and secondary levels.

Pro-Vice-Chancellor,
University of the West Indies.

The interviewee has been involved for a number of years in the problems of introducing new educational technologies and of creating interregional programs. He suggested that lack of quality manpower is one of the main hindrances to implementation of new ideas and that an emphasis on directly assisting the poor makes it difficult to justify a concentration on developing quality manpower, though he feels that is the greatest need.

The problem of attracting skilled persons in specialized fields was mentioned again, and the effect of this on the quality of educational research was also emphasized. There is a need for financing of small programs, which could serve as pre-studies for larger projects. The international institutions seem to lack the vision that programs take time to grow and that development must take place on all fronts for education projects to be successful. The interviewee suggested that if countries had the manpower to run programs the way the international institutions would like them run, they would not need the aid the institutions provide.

One area requiring more research is the hidden cost of schooling (i.e., uniform books, supplies, lunches) that may be an attendance deterrent. It would be possible to study the relationship between school attendance and free lunch programs in Jamaica, but there are no funds for such research. When research functions are so limited, the research has little possibility of having an effect on planning.

The interviewee believes the new programs for the handicapped have equal possibilities for application to work with the deprived poor, as does pre-school education. Pre-schools are seen as serving a custodial function primarily, but a program of "backyard schools" is providing games, food and teaching and is just the kind of small project international assistance could encourage. This particular project is CIDA sponsored.

Cost-saving possibilities in public education were also discussed and the interviewee points out that double-shifting also creates increased maintenance costs and teachers are resentful of the extra work. Utilization of teachers and physical plant on a year-round basis appears to be more practical. The use of radio and VTR for teaching certain subjects also has possibilities, especially in supplying skilled instruction and overcoming literacy prerequisites. However, recurrent costs are very difficult to bring down. One of the problems Jamaica is facing is that the cost per student in the universities is increasing faster than per capita income. Public services provided by the university that would compensate for the high public cost of education are trade-off possibilities that would bear further exploration.

The university is experimenting with telecommunication by satellite as a means of delivering programs to widely scattered countries of the Caribbean region, but the cost-effectiveness of TV is not yet established.

Deputy Financial Secretary,
University of Finance.

The interview was directed at the problem of the costs of higher education and parallel development in other sectors. Changing the shape of the educational pyramid presents the problem of spill-over costs. The solution seems to be to compromise by somehow getting a broad base that provides basic education for all and accepting a peak at the top. The increase in demand for higher education has led to increased demand for higher level jobs. Many countries are facing the reality that ambitious programs must be scaled down to a realistic level.

Unemployment of the educated is an increasing problem. A drop in business (marketing) because of exchange rates has meant great unemployment for this group: in some cases the political climate or fear of loss of holdings has driven professional classes to emigrate; or returns for personal investment and effort are seen as too low. As a consequence, middle management is almost all gone and Jamaica faces a training problem. A possible solution being tried now is buying skills from the outside and using these persons to a double capacity as middle managers and as trainers.

If the education system opts for emphasizing quality broad base (primary level) education, then teachers at that level must be more, not less, qualified than others which will increase costs. Short-run possibilities for reducing capital and recurrent costs are new accelerated training programs, use of other public buildings including churches, for schools in non-use times, and, possibly, educational television, but there is not sufficient evidence that ETV reduces teacher costs.

Training outside the country provides a valuable exposure to other alternatives, but instead of costly three and four year training experiences, one to two month intensive programs are preferable.

Executive Director, Students
Loan Bureau (SLB), Bank of Jamaica.

The discussion centered on the equity issues of student credit and the use the Students' Loan Bureau makes of manpower needs studies. At present, the Bureau has its own manpower unit which defines manpower needs based on studies it has conducted. Loans are granted on the basis of need in priority manpower areas. University graduates, however, are not finding jobs in the areas for which they were trained and are therefore forced to accept jobs in the middle streams. By promoting vocational and technical education programs of study the Bureau is trying to influence the present trend, but there are insufficient mid level schools since the tradition has been to enter full time university level professional careers.

Rural students are generally outside the university system, but the SLB is starting a rural college program based on correspondence courses somewhat like the open university model. A preliminary study indicates a demand for management, accounting and practical nursing courses, with very little demand for agriculture related courses.

In order to increase opportunity for lower income students, no loans are granted to families with an income over \$15,000 Jamaican¹. Prior to 1970 eighty percent

1 In a UWI study comparing per capita income for Jamaica with per capita student cost at UWI, the 1976 per capita income was \$1,180, per capita student cost was \$3,609.

of the university loans went to middle class students, now sixty percent of the loans are to lower class families.

Students who study abroad frequently do not return and the Bureau is looking for incentives to encourage them to return. Having students sign bonds has not proved too successful and they are considering requesting host governments not to grant visas to students studying abroad on Jamaican government grants. Another proposal was to require a pledge of equitable work time in Jamaica after graduation.

Many business firms are now doing on-the-job training which solves the problem of university graduates with skills which are now obsolete or not in demand, but there needs to be more impetus for this kind of activity in the private sector.

Repayment of loans is another problem the Bureau is encountering. Although there is no discrimination by sex in the granting of loans, age 45 is the eligibility cut-off point because of the time required for repayment. Other cost-saving aspects of the loan program are a requirement that loan-funded courses be completed in five years or less, only full-time study is acceptable in most cases, and quotas are set for low priority programs.

The National Planning Agency is taking over the manpower forecasting role and will coordinate its work with the other ministries, particularly Education and Labor and Employment.

----- Minister of Education and
Chief Education Planner, Ministry of
Education.

The interviewee requested that her interview comments be recorded as those of an educator, not as those of her official position.

The brief interview covered two areas: the relationship between international institutions and host countries, and the necessity for fitting theory (whether education or development theory) to the individual character of each country.

The whole concept of how we are relating is wrong - as long as development cooperation is still regarded as assistance, with one country the donor and the other the recipient, there can be no mutually helpful interchange. There must be recognition that both sides benefit from the aid agreement. Whirlwind study tours, one day's interaction, are insufficient grounds upon which to base an understanding of complicated problems.

The interviewee suggested that one of the neglected tasks is matching new ideas with the existing historical system and finding ways to move into the future. Frequently projects are isolated from the real processes of the country and there is little interaction with the educators who had to implement the project to find out from them how it operated.

A similar problem occurs when students live and study abroad and their perspective changes and they are faced with fitting the new theory into the cultural context. Study abroad must be planned with this in mind so students can judge what is transferable. In terms of quantitative research carried out to test specific applications, it

must be remembered that understanding the results of the research will not cause people to act appropriately. The question is how to translate research into action, to get to the essential task, to determine what it is that is going to be operative in that particular place. The interviewee pointed to JAMAL, the Jamaican Movement for Adult Literacy, as an example of a semi-private experimental program which is now under the Ministry of Education and is a very successful adaptation of literacy training to the cultural context. He also stressed the importance of improved cooperation in educational efforts among the Caribbean countries. There is interest in as well as need for some sort of regional network that would allow for the exchange of ideas and personnel, which would be beneficial to all participants as a means of learning from one another's experiences.

USAID Mission Director

From his experience in international assistance programs, he identified two problems of major significance to the success of educational programs. One is the failure to translate from plans to budget allocations - the key requirement for initiating program implementation. Implementation of programs according to plan is the second problem. The primary obstacles to effective implementation are frequently not considered in the planning stage. There is much waste of resources as a consequence. Additional resources for education are frequently unnecessary, instead, a more effective use of existing resources is needed.

Director, Instituto de Investigaciones,
UCA, José Simón Cañas

The interviewee suggested I also study the conclusions of the Seminario sobre Reforma Educativa held earlier this year. The Seminar had fairly representative popular participation from both private and public sectors and offers an amplification of some of the problems identified in the sector assessment of ODEPOR/USAID. He also referred me to the August edition of ECA, the university journal, which will be dedicated to education. The remainder of the interview was spent identifying the primary obstacle to the educational reform, the teachers union, which is politically active, well-organized, and radical. The union did not participate in the seminar, although the seminar was otherwise representative.

Economics Department, UCA.

The interviewee provided additional reflections on the problems of financing higher education, elaborating on the thesis that the consumption of 23.5% of the education budget by an institution that serves only 2.5% of the population constitutes an injustice. He has prepared a paper on this topic, titled, "El Financiamiento de la Educación en El Salvador" which develops the theme in detail. A 1971 publication titled Education covers educational problems in El Salvador from the point of view of a philosophy of education. He suggested a system of educational credit which would cover the entire cost of higher education, without state subsidy. He admitted the political problems of this approach, but did not discuss their resolution.

Action Program, UCA,
Rector, UCA.

Director, Social
_____ vice-

I met with the two interviewees _____ at the same time. Our meeting covered problems of the rural poor, the effects of government reforms. The December, 1976 issue of ECA (Estudios Centroamericanos) on the contradictory effects of public financing of free education which is the basis of much of UCA's subsequent work on public finance of education was also discussed. The Social Action Program _____ is based on the governmental requirement that every student complete a year of community work before graduation. Many of the UCA studies on rural education and the necessity of somehow providing adult education were stressed again and again in the interview.

_____ Sub-Secretary of
State for Education.

The interviewee requested time to respond to the interview questions in writing and will send her responses to Dr. Fitzgerald for forwarding to me in Washington. She suggested that since she may be in Washington as part of an AID sponsored training program, as will be other educators, perhaps it would be possible to have a discussion with them while they are there.

_____ Ministry of Education,
Department of Curriculum and Planning.

The interviewee _____ was one of the coordinators of the seminar on the educational reform. He provided me with the volume of the conclusions and recommendations, and discussed at length the problems with the teachers union, the steps being taken to draw teachers into the planning process, and

the progress to date. In addition, we discussed the present lack of coordination of teacher training in the MOE - - there are four groups which carry out teacher training, Servicios Pedagogicos Tecnicos, Ciudad Normal, Television Educativa, and Direccion de Estudios Basicos, Medios, etc. and there is little or no coordination or agreement of educational methodology among the four. We also discussed the difficulty of quantifying programs that improve the quality of education. The interviewee noted that foreign assistance loans frequently are the death of good programs. He offered examples of MOE programs which are proceeding on a small scale, but are changing the direction of the system. One is CIESMA (Circulo de Estudio para el Magisterio) which was begun by the MOE but is now almost totally self-directed by the teachers and offers an opportunity for teachers to share ideas and prepare curriculum reforms. A second innovative program is the AULA de 12 MESES which will permit students to complete nine grades in seven years, offers cost-saving benefits, and will introduce personalized education (individually programmed). The pilot projects are using Montessori principles and seem equally successful in both rural and urban areas. A third project to reduce the cost of education is an attempt to make the escuelas granjas self-supporting.

SUMMARY OF INTERVIEWS IN SAN JOSE, COSTA RICA
September 18 through 21, 1978

Interviews in Costa Rica were scheduled by the USAID Program Officer, Mary Kilgour, who also took time to participate in most interviews. Ines de Rodriguez, USAID Training Officer, also attended most meetings.

Costa Rica. United Nations Representative,

The discussion centered around UNDP programs in Central America, especially the work toward a network of educational systems which is being carried out by the Guatemala regional center. Projects have centered on identifying needs in rural areas as they affect continued teacher training, educational administration, school nuclearization, short career courses, and basic educational needs.

The interviewee noted that educational planning projects sponsored in the past by the UN had been rejected by the Costa Rican Ministry of Education because of the stirr the projects caused among the teachers. The plans would have required an evaluation of teacher performance. Because the unions are autonomous and very powerful, the Ministry of Education did not want to risk stirring up their opposition.

UN projects have encountered obstacles similar to those described by many others, in particular the high proportions of women teaching at the lower levels, shortages of teachers in rural areas, lack of incentives to encourage teachers to stay in the rural areas.

She sees a definite trend to more and more government investment in higher education and a consequent devaluing of the degree in the labor marketplace.

Planning studies, both those conducted by international institutions and those conducted internally seem to have had some impact on policy decisions in Costa Rica. For example, the IDB study on higher education in Costa Rica identified the increasing costs of higher education and prompted the present interest in student credit programs as a means of financing universities. On the other hand, the Costa Rican Office of Planning is now separated from the Budget Office and has little impact on policy implementation.

It has been the UNDP experience that where host country personnel have not been actively involved in planning programs, there is no implementation.

_____, Minister of
Education and _____, Director General
of Educational Planning.

During a brief meeting the Minister of Education pointed to the ROCAP textbook program as an example of a useful and effective assistance project. The Ministry is trying to establish a fixed level for higher education expenditures - possibly 10% of the budget. They are also exploring new mechanisms for financing higher education.

A recent Ministry of Labor household survey indicates that under-employment of the educated is increasing, yet there is a lack of mid-level managers and unskilled labor. The Civil Service has become the largest employer. A purely academic curriculum for rural areas has been judged inappropriate and there is a movement to develop a curriculum more related to the world of work. In terms of development the relationship between schooling and employment is most important. They are developing

short-term courses and non-formal education programs that could possibly parallel the formal system. Internal migration makes it necessary that education credits be transferable from one area to another. They are also developing out-of-school programs for dropouts and pre-school programs offered through a centralized system which makes the transfer to school easier for poor and rural children. The definition of what constitutes a rural zone is another planning problem. The Ministry feels the definition should be in terms of available services, especially means of communication.

Private schools provide 18% of school services in Costa Rica, but the overall impression is that they produce a division of classes and that their costs are too high, though the teachers are well paid. Since 1932 teachers at all levels have been required to have university formations.

There is here, as elsewhere, a problem of retaining teachers in rural areas, but the Ministry of Education is trying salary incentives and providing housing for rural teachers.

Executive Secretary, CONAPE,
National Commission for Educational Loans.

CONAPE has been in operation since May 1, 1977 and is a response to the problems of meeting rising university costs. Before, the Universities offered state-sponsored scholarships. CONAPE is gradually eliminating the scholarship system and substituting student loans, based on the Colombian model. The system was developed with technical assistance from the Central and South American Association of Educational Credit Institutions.

They work in conjunction with the national planning office and during this first stage of operation are only financing careers in priority areas.

Politically, CONAPE is not popular with radical leftist student groups who argue for free universities or the maintenance of the scholarship system. At least 60% of the student credit goes to students from rural areas. The program also provides student orientation regarding the university and choice of studies, assists students in finding work and housing while at the university.

The repayment of loans has not yet become a problem, primarily because the program is so new.

Ministry of Education. Director of Planning,

The interviewee expressed the belief that education has been a decisive factor in the development of Costa Rica, especially in promoting social class mobility.

He also pointed to the high levels of literacy for both rural and urban populations. Present literacy programs are directed at older adults since they represent almost the whole of the illiterate population. The 1973 national plan for educational development has as basic objectives an overall elevation of the level of schooling attained by the general population, modernization of the present education system and maintenance of the cost of education at its present budget percentages.

Costa Rica has introduced various programs of vocational training after the first nine years of basic education, in addition to the academic or college preparatory schools. The vocational schools also prepare for university entrance if the student desires.

The improvement of rural education is the greatest need, especially for preparing students for economic and social activities relevant to their own area. The Colegio Suisa, is a successful example the Ministry would like to duplicate. The school is self-financing through the marketing of its agricultural products and the marketing is part of the students' educational experience.

The connection between career education and the job market must be firmly established if the flow into the universities is to taper off and thus contain costs.

Another problem in rural education is that of increasing quality. Coverage is almost universal (91% of the school age population is in school) but rural schools are small, without sufficient facilities or resources. A regional system (nuclearization) is being planned as a way of improving quality and saving costs.

Dropout in the primary schools is almost non-existent, but in the third cycle, school desertion is high, 12 to 13 percent. The curriculum was cited as one reason, the necessity to work as another.

Problems in training teachers, in supervision, and in getting teachers to accept new programs were all mentioned as obstacles to improved programs. There are three teachers' organizations or unions, the largest of which is ANDE, National Association of Educators, but little attempt is made to enlist their aid in planning reforms.

Both radio and TV are used in education programs, primarily for adults in high-school equivalency programs and a planned correspondence University course. Neither technology is used extensively in the regular school system.

University Professor, Costa Rica

The interview was concentrated on problems of higher education. Traditionally higher education has concentrated more on arts and letters than on the sciences and for that reason the universities are ill-equipped to offer courses related to the application of technology. There is also a lack of orientation of high school students as to what career choices are open to them.

In addition, there has not been much research on educational alternatives such as the agricultural high schools. There must be incentives for students to remain in the rural area after they have received their advanced technological training.

Many university courses are now long-term courses which could easily be shortened, thus reducing costs, but there is a loss of prestige if the time necessary for completing a career is shortened. This kind of evaluation of university alternatives is better made by outsiders because of the vested interests university investigators may have. The combination of study with work seems to be an effective type of program, especially when it succeeds in incorporating the students in the economically active population. An example of the difficulty of incorporating the expert directly into the arena of practical problems is the Ministry of Education itself, where experts remain locked in the bureaucracy and are not sent out into the field where they can make changes. It is necessary to put the best models close to the teachers, working with them directly.

Director, CEMIE, Multinational
Center for Educational Research.

CEMIE has conducted research all over Central America and the interview covered many topics. The interviewee discussed administration problems of school system and the alternative approaches presently being considered - decentralization which would delegate control of funds and decision making to local boards, and deconcentration which would create resource centers in different parts of the country in order to increase access. Some decision making transferred to the provinces is connected with the system of regionalization.

There is a great need for systems of accountability for school supervisors and directors, and for a means of increasing the influence of rural areas in educational planning. At present, the urban culture is the prevailing force.

Again, the necessity of creating sources of work to compliment vocational training programs was emphasized. A system of incentives for industries to locate in rural area would be one possibility, especially if deconcentration policies included controlling the size of urban centers.

The extension of universities into the provinces has meant a duplication of university courses at a great increase in cost. The present problem with technical education courses is that 80% of the graduates go on to enroll in the Universities rather than into technical careers.

CEMIE is proposing the consolidation of schools in the rural areas, a twelve-month school year, and specialized schools whose curriculum match the areas'

economic characteristics, with the idea that the schools become self-supporting and students in an agricultural school, for example, can learn the whole process of agriculture from planting crops to processing and marketing them.

The proposed school nuclearization calls for an integrated plan carried out with the cooperation of all the government ministries. The IDB and OAS are working with the National Planning Office on the plan which will begin in the most densely populated rural areas, such as Limón.

The rate of consumption is certainly increased with education. The question is whether or not the rate of productivity increases. Teachers are not prepared for multi-grade teaching, they lack materials and an adequate curriculum which would prepare students for the modern world. In addition to a concentration on improving the quality of primary education, it is necessary to increase the coverage of secondary education from its present 41 per cent level. Interviewee feels the dropout is due to the mechanisms of the system. There is too much emphasis on who passes and not on each individual learning at his own pace.

OAS Director in Costa Rica.

The interviewee drew on his years of experience as Director of Education for the OAS in Washington and discussed the problems of education in Latin America at length. Principles of universal education are not traditional in Latin America. Education was for an elite. Government concerns with defense mean insufficient money for education, rural schools are inadequate, over-all quality is poor, there are insufficient and inadequate textbooks,

training of teachers and administrators is only beginning to improve, but salary levels are so low that the best are not attracted to teaching. In general, teachers unions are not groups of professionals, but are concerned only with raising wages, not in improving the quality of education.

There is also a lack of consistent planning integrated on a broader plane with other sector plans. Supervision as orientation or assistance for teachers is not a concept easily adopted in countries with totalitarian governments where supervision means control.

Regarding public financing of education, cost effectiveness is the most important consideration. Semi-official programs of private industry in cooperation with public education are promising new avenues for coordinating education with employment. Educational credit such as was pioneered by Colombia is another avenue for financing higher education. Private schools contribute somewhat to reducing the cost of public education by providing additional schools. The Interamerican Center for Planning Research in Caracas has completed some recent baseline studies on these problems.

The participation of the universities in a country's politics is a grave problem partly created through the university's autonomy and lack of entrance restrictions in many countries. Yet the primary functions of the university remain - to form professionals, to carry out research, and to do social services. Unfortunately these last two are often neglected.

School of Economics and
Institute of Economic
Development, University of Costa Rica.

A study of the structure and cost of education in Costa Rica carried out by the Institute of Economic Development provided much useful information on the problems of school finance, as did this interview with the principal authors of the study.

They, too, defined the chief problem of the university as a lack of efficiency and lack of connection between professional formation and the job market and cited the employment of professionals in jobs inferior to those they were trained for as a common occurrence.

They also pointed out that for Costa Rica, the population bulge of university age is growing now because of the increased secondary enrollment. The short technical courses are three times as expensive as the others, partly because of low enrollment. Thus far, they have seen little influence of CONAPE's loan program on distribution of income levels of students attending university. The same families continue to be able to afford to send their children to the university. At present, 80% of the high school graduates go on to the university and 70 percent of university graduates work for the government.

Their estimate of the percentage of dropouts between first grade and the end of high school (80 percent) is higher than the Ministry of Education estimate (60 percent) and the dropout is attributed to the high opportunity cost. There is talk of the possibility of government subsidy of rural high school students. They see the education-from-a-distance programs

as benefiting housewives more than laborers. The research capability of the university is not utilized sufficiently by either the government or private industry.

_____ Political Counsel to the President.

The interviewee recapitulated most of the remarks of the other interviews, especially reiterating the goals of the Ministry of Education. He confirmed that the purpose of CONAPE is to replace scholarships with loans and thus change the paternalistic concept of the state that presently exists. The earlier emphasis on quantity has moved to a concern with the quality of education, especially in rural areas. A major problem is one of concept or image. The title-seeking that inspires university attendance prevents understanding that education is related to work.

SUMMARY OF INTERVIEWS IN BOGOTA, COLOMBIA
September 22 - 27, 1978

of Education. Director of Planning, Ministry

The interviewee identified primary education as the priority area for Colombia and discussed the situation in the rural areas at length, including MOE's plans for deconcentration and decentralization based on the mapa educativo, now in preparation. Teachers unions were not identified as a major force blocking new programs. Their overriding concern, according to ^{interviewee} is for increased salaries and the norms that govern the scale of pay within the system.

We also discussed solutions to meeting increased costs of higher education. Improved administrative effectiveness on personnel and increased use of mass communications are being considered by the Ministry, as well as setting a fixed budget for higher education which is not to change from year to year. We also discussed the connection between planning and implementation, the relationship between private and public schools, and the assistance to education in rural areas provided by the Federation of Coffee Growers.

National Planning. Economist, Office of

The interviewee has worked in planning in Colombia since 1949. He is primarily concerned with macro-economics, the investment policies and financial strategies that have been part of economic development in Colombia. In his opinion, education is a welcome accompaniment to development insofar as it provides educated labor when necessary, but development is primarily influenced by other factors such

as economies of scale and roads which give an impetus to the development of cities and create a national market. He does not see much future for the present decentralization plans, especially as they do not foster economies of scale. SENNA is the most important vocational training effort in the country, but he feels training abroad is important in the development of science and technology. As far as economic policy goes, he believes the National Planning Office has been effective in its influence on investment budgets and the allocation of resources.

Director, Fundacion Educacion
Superior, FES.

The interviewee is also a former director of ICFES, Instituto Colombia para el Fomento de Educacion Superior. He was one of the originators of the plans for Universidad a Distancia. Our discussion centered on the need for educacion a distancia, or the university without walls, the problems of financing higher education, and preparing primary and secondary education teachers.

CEDEI, Investigation in ETV and
Educacion a Distancia.

The interview centered around the need for more practical research in education, modes of assistance which are most useful, problems of improvement of quality of education, the necessity of changing the educational ambiente, since it is very difficult to change teachers, the use of commercial communication techniques in non-formal and formal education, the low rate of return of investment in teacher-training, and the need for regional agreements which would develop workshops and other activities and to plan and carry out programs.

Universidad Javeriana.

The interviewee , a sociologist and education specialist, also works for the Ford Foundation in Bogota. He has participated in investigations and research in Latin American education, especially the series of conferences on education sponsored by the Ford Foundation.

We discussed the education system, governmental conception of education, and infrastructure. Education as an end in itself is not a priority. Education as a support to development is. The conversation developed a scheme for integrating the various sectors.

Andres Bello _____, Executive Secretary, Convenio

The interview centered around Andean Pact countries' participation in educational planning activities, the emphasis on secondary vocational education as a result of international assistance and studies related to education in Latin America.

of programs. One bureaucratic rock is the tendency of governments to change the entire administration of the Ministry of Education and other sectors each time there is a change in government.

INABEC, and Director General,
Tecnico, INABEC (Instituto Nacional de Becas y Director
Credito Educativo. Nacional de Becas y

At present, INABEC monitors all educational grants, scholarships and loans made to Peruvian students in an effort to provide human resource data and, to some extent, to direct student career choices in the light of manpower needs assessment. In the last five years, INABEC has made 477 student loans. International scholarships are increasing. Authorization to study abroad requires the student to have a guarantor who will be responsible for paying the student's estimated taxes if he does not return. The student credit system is relatively new and INABEC is searching for a satisfactory system of guarantees of repayment of the loans.

The majority of loans are made to students in the urban area, particularly Lima, partly because the system of notifying students of available scholarships and loans is very poor, and in part because high school graduates are concentrated in the urban areas.

Short term study abroad as part of technical cooperation programs is also supervised by INABEC, though more for the purpose of tabulating national human resources than for any control of such study programs.

Monitoring higher education costs have made the program a more urgent necessity. The distribution of the National Education budget over the past ten years has shown a definite shift toward higher education, having fewer funds available for basic education as evidenced by the following figures which were provided:

<u>1968 Budget</u>	<u>1978 Budget</u>
Basic Education (grades 1-9) -30%	Basic Education -30%
Secondary Education (10-11) -30%	Secondary Educ. -40%
Higher Education -20%	Higher Educ. -30%

_____, Director
 Superior of the Ministry of Education

In this brief interview the Ministry of Education's primary goals and concerns were outlined. Models for out-of-school education, especially for pre-school programs are related to the general reform goals for greater community participation. Pre-school programs have the added advantage of providing educational services to parents and children at the same time.

Adult education is as much as possible connected with private businesses or trades. For example, there is a literacy program for fisherman. The Ministry wishes to recognize and give credit to self-education. New technologies being explored include educational television and correspondence courses, especially as a means of reaching remote rural areas, but the cost factor has yet to be examined.

The tremendous demand for higher education may be due to the lack of employment opportunity. Under the new plan, higher education will be more directly connected with

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work opportunities. It is hoped this will provide more middle level workers and stem some of the flow into the universities.

_____, Academic Director, INIDE
(Instituto Nacional de Investigacion y Desarrollo
de la Educacion).

INIDE was created in 1972 as a direct response to the 1968 Unesco conference on educational planning which insisted on the need for assigning to research part of the national budget. In addition to data collection, INIDE carries out various types of analysis on topics useful to the Ministry of Education, including curriculum evaluation, validation of strategies, evaluation of return on teaching and teacher-training, test validation, experimental projects and educational economy.

At present curriculum research is regarded as an important activity in order to better integrate education with the agricultural industrial productivity of national development. Some research and development activities include teacher-training activities for those teaching in the new Professional Education Schools who may not have the scientific or vocational training orientation the program requires.

A problem the INIDE researchers are recognizing is the diminishing of community participation in the educational reform. Teachers must be trained to work with the community as well as with their students.

If there are fewer teachers due to the need to reduce costs, then training and re-training of teachers becomes doubly important. The establishment of goals for each grade level is another of the INIDE activities which require s

teacher participation. The basic strategy is education for work at every level, but this requires a retraining and reorientation of teachers. The Peruvian experience is recognized within Peru as an experiment which other countries are watching closely.

A preliminary study of demand for correspondence courses which would result in teachers receiving their licenses or provide them with specialized courses indicates an overwhelming response. This and other INIDE studies and pilot programs are intended as support to the education system. Methods which INIDE regards as successful are the practice of having educators and communities work in groups or teams, programs which promote greater communication between the teacher and the community, centers of instruction located in private businesses, integrated education in rural areas, and pre-school education, which while it does not yet have much coverage, shows good promise for assisting families.

Advisor to the Ministry
of Education.

The interviews covered not only education in Peru, but the problems of assessing the impact of education on development in any country. Instead of evaluating the sources of education programs in terms of the years of schooling received or the average level attained, it would be better to look at the distribution of funds among regions, to look at quality as well as quantity of education, the differences between rural and urban zones not only in terms of literacy, but cultural differences, differences in costs of education in each area, and differences in quality of schooling.

Equity as a result of education has not yet taken place. In fact, the opposite has taken place because of reliance on the international model of development. Insufficient attention has been paid to the behavior of the supply of labor in relationship to the market demand. It may not be necessary to relate education so closely to supposed manpower needs, but to provide training which allows the laborer to adapt quickly to learning new skills. In evaluating education, all the benefits must be considered, not just the socio-economic.

The proposition that more education equals greater productivity may be a myth. It has not been studied sufficiently, but what data there is from Mexico, Brazil, and Peru suggests there may be a different relationship.

The question of how to distribute scarce resources among priorities is key. Frequently money is put in the wrong place at the wrong time. It is necessary to examine the role of education in reducing poverty - e.g., improving nutrition is clearly the priority area where the choice is between life and death as it is in many poor areas. The effects of nutrition on the education process should also be examined when setting investment priorities.

The educational reform in Peru is in trouble at present, in part because of the national financial difficulties, in part because of internal problems. It is possible the reform was too conceptual, with not enough attention to costs and implementation planning. Or the problem may lie in inefficient administration, lack of technical capabilities, or it may be that the original plan has been changed, or that the social and political conditions have changed. More likely, the problems are a result of various combinations of these factors. A self-examination within the Ministry of Education is planned to discuss possible

sources of problems and determine what steps could be taken to remedy them.

There is an urgent need for more research to determine the nature of the relationship between different types of education and different types of employment. What seems to be most useful to the student?

In terms of technical cooperation, we should be thinking together to find a model for finding a model for development.

 , Professor, Director of Planning,
Catholic University.

The interviewee has been the Director of the University's Planning Unit for the past few years and the interview centered on problems of private higher education.

The university has received assistance from private foundations, especially in developing the science and technology areas of the curriculum. It is difficult to obtain scholarships or assistance for advanced training in the physical sciences and technical professions, but the securing of such training for the university's professors has meant that many of them have continued their university teaching.

Exchange of professors with foreign universities have proved very useful.

A study of university students' career choices (or course concentrations) seems to indicate that when the job market is saturated, students choose different courses on their own.

Supplementary Interviews

In addition to the summarized interviews in Latin America and the Caribbean, the following people were consulted in the course of preparing this report:

In Washington, D.C.:

Mr. Michael Allewyn, OAS
Mr. Eugenio de Anzorena, IDB
His Excellency Virgilio Barco, Colombian Ambassador to the U.S.
Mr. Aurelio Cospedes, IBRD
Mr. Ralph Hirschtritt, IDB
Mr. Mats Hultin, IBRD
Mr. Osvaldo Kreimer, OAS
Mr. Al Lowenthal, American Federation of Teachers, AFL-CIO
Mr. Jan van Orman, Inter-American Foundation
Mr. Thomas Rosenborg, OAS

In New York:

Mr. Richard Krasnow, Ford Foundation

In Jamaica:

Dr. Robert Johnson, AID

In El Salvador:

Dr. Hunter Fitzgerald AID

In Costa Rica:

Ms. Mary Kilgour, AID
Sra. Ines de Rodriguez, AID

In Colombia:

Mr. Dan Cox, AID
Sr. Rodrigo Cabrera, AID

In Peru:

Dr. Barry Heyman, AID
Dr. Donald Foster-Gross, AID
Dr. Orlando Rojas, AID

ANNEX C
RECOMMENDATIONS FOR EDUCATION FROM
MOVING TOWARDS CHANGE

The following recommendations are made to facilitate the shift to a new development orientation:

"The preparation of educational policies which will make it possible to align education with the general development effort; this remodelling of present educational systems so that they take greater account of the economic, social, and cultural realities of each country should, in particular, make it possible to train men and women who have their roots in their environment, but who are able to stimulate the changes necessary for the progress of all the communities to which they belong;

The preparation of formal and non-formal, school and out-of-school curricula which will enable all to acquire techniques which will be of use to them in their work, whilst developing their ability to take the initiative and to change.

The linking of productive work with education so as to (a) contribute to character training and to the acquisition of manual skills by upgrading manual work, seen as a vital part of the integral training of young people; (b) associate schoolchildren and students, as producers, with the country's economic and social development programs, so that they will be able through their work to provide some of the resources necessary for their own subsistence; (c) develop closer links between intellectual and manual workers (laborers and peasants), since the convergence of their efforts in mutual understanding is essential to national development. In the least developed countries - one might even say in all countries - an abstract, bookish and alienating kind of education, an education which

has little to do with the specific nature of society, contribute little to development.

The encouragement of education services which, at the higher level, possess centres of excellence that train research workers, technical experts and other vital specialists, but, with the maintenance of a constant link between research, training and production.

The establishment of machinery to ensure the integration of these changes with changes occurring in other sectors of society.

The problem of illiteracy is so great that the establishment of a new economic order implies its eradication. Illiteracy is a brake on development and restricts human rights." (Unesco, Moving Towards Change, Paris: 1976, pp. 88-90 cf. also pp. 123-124 for goals specific to Unesco's own programs).

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