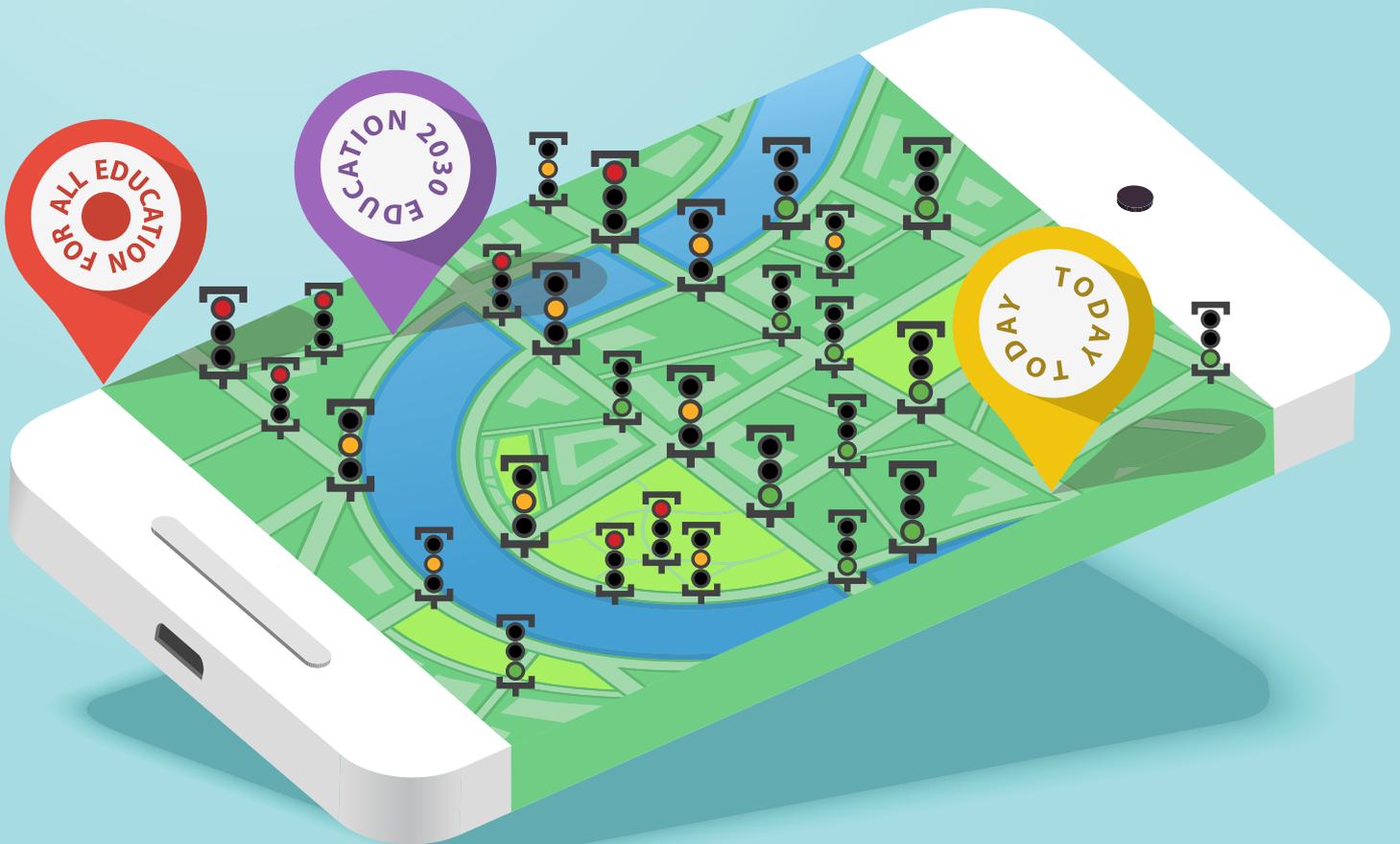




EDUCATION INTERNATIONAL'S ROADMAP TO FINANCING EDUCATION



In an era where investment in education is declining and myriad shortcuts are popping up, EI presents its rights-based Roadmap to sustainable, predictable and principled education financing. The roadmap gives a green light for the urgent measures, a yellow light when

caution is needed and a red one when we need to slam on the brakes.

Over the next year EI will be releasing companion policy briefs to provide more details in driving educational development forward.



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FINANCING QUALITY EDUCATION FOR ALL

-  Education must be **publicly funded and regulated**. States should substantially increase public investment in education, and allocate **at least 6 % of GDP** and/or at least 20 % of the national budget to education.
-  Education financing has to be **sufficient, predictable and sustainable**. States should take all necessary measures to ensure they have sufficient revenue to fund their public education systems. This includes **closing tax havens, combatting tax minimisation, avoidance and evasion**, and ensuring companies pay their fair share of tax.
-  Efforts to increase tax revenue should be linked to increasing the progressivity of taxation, and be in line with social and environmental aims of the SDGs. Taxation, including progressive income taxes should **increase equity as well as raise revenue**, and should be collected efficiently and in an accountable manner to limit tax avoidance and evasion as well as the misuse or diversion of funds.
-  Explore new mechanisms of educational and public funding, such as a tax on cross-border currency transactions (like the Tobin Tax), or a **global tax on wealth**. Financial transaction taxes help raise additional revenue and limit financial speculation. They also provide tax authorities with knowledge of the ownership of financial assets and, therefore, help combat tax evasion and avoidance.
-  Tax must be paid where the profit has been made; **transparent country by country reporting** should be obligatory for multinational companies. The G20 has agreed to changes in international corporate tax systems through its work on Base Erosion and Profit Shifting (BEPS). The BEPS Action Plan should be implemented to help limit and control tax avoidance and aggressive tax planning, and provide an orderly and fair way to tax multinational enterprises.
-  Governments should support transparency and public scrutiny of education budgets, enabling teachers organisations and civil society to **track actual spending** and analyse equity of both budgeting and spending.
-  Governments should put in place legislative safeguards for individual actors and groups to report the misallocation and misappropriation of resources. **Whistle blower protection** is an essential part of social accountability frameworks and effective education systems.
-  Explore possibilities for facilitating at the international level the use of private funds (including pension funds) for education through the purchase of bonds or other financial instruments that would contribute to public education and the democratic control of education and/or its infrastructure.
-  Education is a **human right and a public good**; public authorities are required to protect the education sector from profit-driven corporate influence.
-  While taxing natural resources may help raise government revenue, both price and demand may change over time and be **difficult to predict**, which makes long-term planning challenging. It is risky to build a budget on revenue from a single type of tax.
-  Earmarking specific tax revenue for education may help increase the public education budget but should not make up too big a proportion of the education budget, which risks **dependence on insecure or unstable sources of revenue**.
-  While all countries have the potential to increase their tax revenue, **the ability to rapidly raise revenue varies** as it depends on the size and structure of the economy, tax policy and administration capabilities, efficiency, and integrity as well as constraints that may be imposed from outside influence through fiscal and budgetary surveillance policy.
-  **Devolution and decentralisation schemes** risk transferring burden of financing to local jurisdictions.

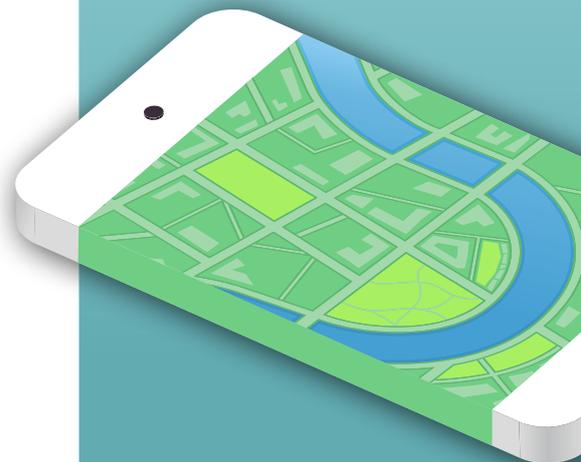
-  When contemplating the provision of public funding to private schools and institutions, governments must evaluate whether doing so will promote access, equity, and quality for all.
-  **Innovation is not an inherent feature of private education.** In many cases, private providers narrow rather than open up education practices and opportunities.
-  **Governments must not abdicate their responsibility to provide free, quality, publicly-funded education.** So-called innovative and oftentimes parallel initiatives detract attention and dilute resources.
-  Governments must not waste precious public resources by diverting them from public services to incentives, subsidies and other forms of corporate welfare. Unfair loopholes and other exemptions must be closed.
-  **Public money must never be used to subsidise and support profit-making education providers.** Public money should be used to meet governments' primary obligation to properly and adequately fund free quality universally accessible public education.
-  **Results-based financing distorts teaching and learning** processes, as well as education policy, by focusing on narrow quantifiable outcomes, creating perverse incentives to invest in short-term gains rather than system strengthening. Results in education are dependent on long-term investment and appear over time, such as its contribution to social, cultural, democratic and economic development.
-  Schools should not charge tuition or user fees, as **any fee is a barrier to access and completion.**
-  **Household spending must not be considered a source of financing** for any level of education; it is neither sustainable nor equitable. In addition to primary and lower secondary education, publicly funded and accessible quality early childhood education and post-secondary education should be a policy priority, particularly in least developed countries where this is often not yet the case.
-  **Student loans are not a sustainable financing pathway** for post-secondary education. The increasing reliance on student loans to finance tertiary education has resulted in high debt levels among students.
-  **Remittances and other forms of private income must not be considered a substitute for government obligation to invest** in public education and other public services such as health.
-  Costs and benefits of education cannot be expressed in simple comparable units. **Economic evidence alone cannot determine policy priorities** and choices in public sectors, such as education; policy must be based on the rights and the needs of the people.

AID AS A MEANS TO FINANCING QUALITY EDUCATION FOR ALL

-  **Donor countries must meet their commitment to provide 0.7 % of their Gross National Income to Official Development Assistance.**
-  Donor countries should allocate **at least 10 % of Official Development Assistance to education**, with particular attention given to least developed countries and education in emergencies.
-  Governments must ensure that donor efforts are coordinated and harmonised to **strengthen education systems**, based on national education plans, built on national needs and priorities and developed in dialogue with national stakeholders, including teacher organisations.
-  Donor countries must deliver on their political and financial commitments to the Global Partnership for Education (GPE), recognising that the GPE currently has insufficient funding to support the implementation of national education sector plans and programmes.



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-  Funding from international and bilateral donors and the private sector, including corporate, foundation and philanthropic contributions, must **respect the right to free quality education** for all citizens and residents of that country, and strengthen national education systems.
-  **Aid to education should be predictable and long-term** to allow for planning and budgeting in line with democratic processes. Any performance indicators must be in line with the national education plan and priorities.
-  There should be **full transparency in the use of funds**.
-  Donor countries must provide **transparent and comprehensive information on aid flows**. They should report separately on aid to education and on allocations for scholarships for higher education studies in the donor country.
-  **Donor accountability** must be ensured. It should be an integral part of the monitoring of implementation of SDG 4 on Quality Education for all.
-  Applying for **external funds to finance the national education sector should be understood as a temporary strategy**. The government should simultaneously increase efforts to find sustainable national solutions.
-  Funding from international and bilateral donors, and the private sector, including corporate, foundation and philanthropic contributions, must not interfere with the education policy and priorities of the recipient country. **Country priorities must never be undermined** or shifted by conditions or performance indicators tied to aid.
-  Funding from international and bilateral donors, and the private sector, including corporate, foundation and philanthropic contributions, must not undermine the existing public education system; such **funding must not be used to support privatisation** and commercialisation of education.

STRENGTHENING EDUCATION SYSTEMS AND ENSURING QUALITY

-  **Education financing needs to be sufficient, predictable and sustainable** to ensure the provision of quality education for all.
-  Education requires **stable and robust governance and infrastructure**; it is difficult to improve education in countries where public services and systems are weak.
-  Governments must ensure the right to education of all people and the **balanced development of all education sectors** from early childhood education through to tertiary and life-long learning.
-  **There is no one-size-fits-all solution**: all countries have their own unique starting point and context, and need the space and the support to formulate their policy choices and plans with the full participation of education unions and other relevant social partners and in dialogue with all stakeholders.
-  Governments should **set quality standards for all levels of education**, including teacher training, and develop national curriculum and assessment systems that support students in their learning and the further improvement of the system. These standards should cover both inputs, such as ratio of trained and qualified teachers, processes and outputs, and be developed with teachers, education support personnel and other relevant social partners through a transparent participatory process.
-  **Regulation should be used as a tool to assure the quality of education provided across education institutions** in the same country. All providers of education must follow the same rules, regulations and



procedures. Regulations must apply to both inputs and outcomes: teachers are trained and qualified, national curricula is followed, and environments are consistent with national laws.

-  Where private providers exist, governments should set up and strengthen legislative and judicial measures to **ensure due process and compliance by private providers** of national rules and regulations. Failure to comply must include remedies such as suspension and revocation of registration of school providers.
-  Governments should **cut the costs of teaching and learning materials through copyright and licensing regulations**, and encourage open education resources that students, teachers and schools can use and adapt to their needs free of charge.
-  Governments should **make relevant data and information public** and easily accessible to facilitate and encourage public debate and scrutiny of the education system, as well as budgeting and spending.
-  Standardised testing reduces the teaching and learning process to **simplistic quantifiable indicators**. Such one-dimensional approaches to education undermine the relevance, quality, effectiveness and confidence of education systems. They cannot determine the quality of an education system and must not be used as policy-making instruments.
-  League tables and rankings based on standardised outcomes alone make for misleading comparisons between and within national education systems. Diversified national **education systems across the world must not be ranked** at the international level.
-  **Different levels of education must not be competing with each other for financing**. It is neither sustainable nor coherent with SDG 4 to shift funds from one level of education to another.

INVESTING IN TEACHERS AND EDUCATION SUPPORT PERSONNEL

-  Governments should **significantly increase investment in the recruitment, training and retention** of teachers, as well as education support personnel.
-  Governments should **ensure continuous professional development** of teachers as well as education support personnel, in particular, support the integration of new areas of work, such as education for sustainable development and global citizenship education.
-  Governments should enhance the quality of education by **investing in the decent working conditions** of teachers, as well as education support personnel, including decent salaries, fair recruitment and employment, career progression, and the right to collective bargaining and freedom of association.
-  Education support personnel should be recognised for their work in the education community and enjoy **the same status, rights and conditions** as other education personnel with similar academic and technical qualifications and experience. Governments should invest in the further professionalization and recognition of education support personnel.
-  Governments should **set up and/or strengthen mechanisms for social dialogue**, and expand its scope to include the full remit of the Education 2030 agenda, ensuring that **teacher unions are involved in the development, implementation, monitoring and evaluation** of education policy.
-  Governments should support the further professionalization of both teachers and education support personnel by **developing national quality standards for teacher training and qualifications**, and upgrading the skills of unqualified and underqualified teachers, in dialogue and with the full participation of teacher unions.



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 Governments should **implement the provisions of the ILO/UNESCO Recommendation** concerning the Status of Teachers (1966) and the UNESCO Recommendation concerning the Status of Higher-Education Teaching Personnel (1997).

 Governments should **guarantee the professional and academic freedom and autonomy** of teachers, academics and researchers.

 Short-term solutions to the shortage of trained and qualified teachers must not become the new norm but always be part of a long-term strategy for ensuring every child's right to be taught by a trained and qualified teacher.

 **Money can never be saved by cutting costs for teachers and education support personnel**, particularly not through casual and/or limited-term contracts. Underinvestment in the education workforce leads to teacher shortages and education of poor quality.

 **Qualified teachers can never be replaced by unqualified or untrained personnel.**

 **Teachers should never be subject to performance-based pay schemes** that rely on student learning outcomes measured through standardised tests; these limit the professional autonomy of teachers and narrow the curriculum.

ENSURING EQUITABLE AND INCLUSIVE EDUCATION

 Equitable and inclusive education means that **all students should be educated together, to the same high standards**, in so far as possible in the same education institution. Governments must take all measures to ensure that disadvantaged students enjoy education of the same quality as the most advantaged.

 In line with the universal right to education and SDG 4, **the same level of ambition in terms of access and completion must apply to all students**, regardless of background, in all countries; all students must have the same opportunity to continue their education at the highest level.

 All education should be free, from early childhood through to tertiary education. Urgent action must be taken to **make education at all levels free**, and to **abolish all indirect costs of education**, such as those for books and materials, uniforms, school meals and transport.

 **Additional targeted funding** should be introduced for disadvantaged areas, communities and groups, including rural areas in many countries.

 Both budgeting and real spending should be assessed to ensure that **financing is progressive** and that **resources reach the most marginalised**, and the results should be publicly accessible. Gender budgeting is recommended.

 Education unions, student organisations and other civil society groups have an important role to play in monitoring the equitable distribution of resources in both education budgeting and spending.

 Even in countries where education is free at the point of delivery, **indirect costs of education remain** a barrier to accessing and completing quality education and must be minimised.

 **Governments and the international community must not set a different standard for learning and completion for disadvantaged students**; ensuring that the most marginalised learn the basics is not enough.

 Despite its significant contribution, education, by itself, is not enough to remedy all of the inequalities in society. **While schools can contribute to equity, inclusion and sustainable development, they cannot do this in isolation.**



INVESTING IN TECHNOLOGY FOR QUALITY EDUCATION

-  **Teachers must have a say in the selection and integration of new digital education technologies**, ensuring that tools and materials are of high quality, support teaching and learning, and remove unnecessary administrative burdens. ICT policies and plans should be designed and developed with the full participation of teachers, education support personnel and their representative organisations.
-  Technology and digital learning may **enhance teaching and learning when tailored to national curricula and standards**, and supported by teacher training and continuous professional development.
-  Teachers support the principle of learning communities by sharing methodology, materials and best practice with each other; governments should **support teachers to network and collaborate within their trade unions, schools, and communities**.
-  Quality education requires access to computers and the internet. Governments should look at the **access of schools and education institutions to electricity, technology and internet** as part of a broader strategy for infrastructure development and investment.
-  Introduce mechanisms for assessing and assuring the quality of online and digital education, including Massive Open Online Courses (MOOCs), and regulate the prices.
-  Risks associated with data security and protection, the promotion of hatred, cyberbullying and pornography, and the use of surveillance technology, among others, must be addressed to **ensure the safety and well-being** of all education personnel and students.

-  Technology and digital learning can help countries progress and enhance quality but is **no cheap fast-track to quality education for all**; it can only play this role as part of a quality education system, where teachers are trained, qualified and supported, and tools and environments adequate.
-  Technology is **not innovative or of high quality by default**; well used, it can amplify good practice. Poorly used it can be a distraction.
-  There are serious **pedagogical concerns** related to the effectiveness of Massive Open Online Courses (MOOCs) in particular, for which worryingly high drop-out rates have been observed.
-  When engaging ICT companies, corporations or foundations to support the use of ICT in education, governments should ensure that education programmes are: a) inclusive, b) aimed at improving access to and the quality of education, c) support good pedagogical practice, d) do not worsen teachers' working conditions or employment security e) have a teachers' professional development component, and f) respect national curricula.

-  Don't approach technology as a cost-saving measure. **Technology can never replace a quality education system**: a qualified and trained teacher, and quality teaching and learning environments.
-  **Cheap online courses are not a way of replacing post-secondary education**. Both should be free and of high quality.
-  An over-reliance on education technology creates and furthers inequalities in education by pushing students from disadvantaged backgrounds towards lower quality online solutions.
-  **Don't leave online and digital education unregulated**, as this may lead to poor quality education driven by the desire to make profits!



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