



# Non-Governmental Schools in Primary and Secondary Education

Discussion Paper Education

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## Table of Abbreviations

BIA	Bridge International Academies
BMWEC	Burmese Migrant Workers Education Committee
BMZ	Federal Ministry for Economic Cooperation and Development
DFID	Department for International Development
DRC	Democratic Republic Congo
EFA	Education for All
EMIS	Education Management Information System
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
GNECC	Ghana National Education Campaign Coalition
IB	International baccalaureate
KEC	Kosova Education Center
MDG	Millennium development goal
NGO	Non-governmental organisation
ODA	Official Development Assistance
PPP	Public private partnership
UNESCO	United Nations Educational, Cultural and Scientific Organization

# Preface and Acknowledgements

This discussion paper has been compiled on behalf of the German Federal Ministry for Economic Cooperation and Development. It derives from a draft composed by the Sector Programme Education of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and was afterwards further refined and elaborated in an intensive cooperative process through Prof. Dr. Annette Scheunpflug and Mark Wenz from the Otto-Friedrich-University Bamberg. In a consultation process the drafts of the paper were discussed with practitioners of their respective fields and revised accordingly. We would like to thank the experts of Bread for the World (Brot für die Welt), the BMZ, the German Association of Adult Education (DVV e.V.), GIZ, the German Union for Education and Science, the Global Campaign for Education, KfW Entwicklungsbank (development bank), Kinderothilfe and Oxfam for their insightful comments and annotations of the earlier versions of this text. The authors express their gratitude towards the team of GIZ, in particular Erfan Diebel, Dr. Michael Holländer and Alice Köstler, who were responsible for the supervision of the discussion paper, for the competent, trustful and pleasant cooperation, both at a personal and professional level.

Bamberg in July 2015

Prof. Dr. Annette Scheunpflug & Mark Wenz

## **Discussion Papers Education**

The GIZ Sector Programme Education compiles discussion papers on current debates in international development cooperation in the area of education on behalf of BMZ and in cooperation with national and international partners. The discussion papers provide in-depth professional insights into the respective topic. The opinions, positions and recommendations of the authors presented in this paper do not necessarily reflect the opinion of BMZ or GIZ.

# Executive Summary

Are non-governmental primary and secondary schools a solution to offer more school children in developing countries access to education or do these non-governmental education providers merely reinforce the inequalities in access to education? Are private education providers really offering education of higher quality or do they actually just evade public control? These questions are subject to international controversy, especially in the light of the profit-oriented engagement of so called *low cost private schools* in the sector.

The aim of this publication is to provide a differentiated and objective overview of this topic in an often very ideological debate, as there is no comparable documentation of the issue available so far worldwide. Moreover, recommendations will be drawn from the analysis for a constructive approach towards non-governmental schools and a possible cooperation with them, e.g. about the question, when financial support with funds from official development cooperation budgets for so called private schools seems reasonable. The study at hand has been compiled on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) by the University of Bamberg with support on concepts and contents from experts from Bread for the World (Brot für die Welt), the German Association of Adult Education (DVV – Deutscher Volkshochschul-Verband e.V.), GIZ, the German Union for Education and Science, the Global Campaign for Education, KfW Entwicklungsbank (development bank), Kindernothilfe and Oxfam.

## The relevance of non-governmental schools

Non-governmental schools are widespread in many of the partner countries of German development cooperation. In some of these countries, they make up a considerable part of the educational offers. This includes profit-oriented and non-state-regulated providers. On the international level it is being discussed controversially how national governments and donors should approach this phenomenon.

A hindrance to this discourse is the fact that there is no internationally recognised definition of ‘private schools’ and that many states tend to interpret their statistics in their own favour. States that are under the pressure to succeed under the ‘Education for All’ agenda are often interested in reporting the highest possible number of schools to demonstrate

their engagement in the education sector. Therefore these states have an interest in accounting all schools as public schools that are granting state-accredited qualifications and diploma and that receive any kind of public support. On the other side stand those (non-registered) non-governmental schools, which are often not documented in any educational statistics. This explains why independent surveys often count a significantly higher proportion of non-governmental schools than the UNESCO statistics. Low fee schools are, for example, widespread in rural India with a share of 28 per cent of schools or in Pakistan with 59 per cent in urban regions and 23 per cent in rural areas. A World Bank study documented a share of church-run primary schools of more than 70 per cent for the Democratic Republic of Congo.

## Definition of ‘private schools’

The attribution of meaning to the term ‘private school’ as an elitist and selective school alone does not reflect the complexity of the situation. There is not ‘the’ private school but rather parts of the sponsorship that are either public or non-governmental - depending on the financial, sponsorship and legal status. This distinction between the individual school types is not always a static and clear one.

- **Financing of education:** non-governmental schools can be differentiated according to their main sources of funding – who is financing personnel, infrastructure and teaching and learning materials – and which part of these expenses are being borne by the state, private bodies and the parents? There can also be made a distinction between schools with or without profit orientation and among the first between schools with higher and with lower school fees (‘private schools’ vs. ‘low-fee-private schools’ / ‘low-cost schools’).
- **Legal status:** non-governmental schools can be different in whether they are ‘registered’ or state accredited, whether they orient themselves on national or other curricula and whether they issue nationally recognised degrees and qualifications. In Germany, for instance, one differentiates between substitute and supplementary schools. This legal distinction concerns the curriculum and the qualifications and diploma granted by the school. Substitute schools perform the authoritative

functions of the state. They are legitimised to grant official educational degrees and qualifications and are consequently allowed to issue the associated diplomas or graduation certificates. Supplementary schools cannot issue German degrees or qualifications and the compulsory schooling obligations in Germany are not automatically fulfilled through attendance of one of these schools.

- **Sponsorship:** there is a variety of sponsorship models. Sponsors can be religious or denominational institutions, companies, local or international non-governmental organisations (NGO) or parent communities and associations. The division of labour between private sponsors and the state can vary.

## Potentials and risks

In the light of such diversity it is important, when assessing and evaluating the potentials and risks of non-governmental schools in development cooperation, to look at each case individually and in its specific country context. Sponsorship and financing of schools can be associated differently to public and private actors (see illustration 2: Possible financing and sponsorship models for schools: p.16).

The domination of specific models in a national education sector is connected to different possibilities and risks. For an analysis of these potentials and risks the Human Right to Education serves as the foundation for the underlying assessment criteria:

- **Access, inclusion, equality and social segregation:** Which role do non-governmental schools play in a society regarding social segregation and inclusion? Do they lead to further segregation of certain groups or are they providing access to education for formerly excluded groups? Are there reasons to justify 'separation' via private schooling, like the protection of minorities or the support of girls and young women?
- **Plurality of ideological beliefs and religions:** In what way and to what extent are school systems subject to religion and plurality of beliefs? How does the school system provide orientation and identity on the one hand and foster openness and tolerance on the other hand? Is school a place for society where norms and values are shaped that will pave the way to participate in a liberal and tolerant world society?
- **Quality:** How can educational quality be assessed and measured? Which mechanisms are implemented to ensure quality in the public as well as in the non-governmental school system? How are teachers in public and in non-governmental schools recruited, trained and financed?

- **Financing:** Does the state meet its obligations in the educational sector? Which parts of the population contribute to what extent to the educational system and how are they reimbursed for their investment? How are non-governmental schools contributing to the financing of education? Do they address certain parts of the population?

These criteria only present hypothetically distinctive features, while in reality the questions of equality, social norms and values, financing and economic interest in education are always interconnected and cannot be solved independently. Respectively, their evaluation with regard to non-governmental schools is also influenced by the quality of the schools. It should also be taken into account that some of the tensions in the education sector will remain irresolvable as the decisions in educational politics are always the result of complex compromise between various demands.

## Recommendations

German development cooperation should be committed to supporting a more prominent position for this topic on the international education agenda and to promoting a more differentiated discourse on non-governmental schools. Besides the basic education segment, the other sub sectors (Pre-school, vocational education and training, higher education) of education should also be subjects of further research. Additionally, a nationally and internationally more differentiated understanding of the manifold forms and models of 'non-governmental schools' or 'private schools' is desirable.

As education is a public duty in the opinion of BMZ and in the eye of Human Rights norms, the priority of German development cooperation should be to support partners in shaping and building education systems that guarantee quality and free basic education for all children. This is seen as the biggest and most important contribution of German development cooperation for now and for the future. The question whether and to what extent non-governmental schools should be considered in development cooperation should depend on whether the state fulfils its educational obligations, whether the governmental authorities invest a sufficient part of their gross national product in education and schools and whether they re-finance the non-governmental schools proportionately.

In order to both a) use the potentials and b) address the challenges of non-governmental schooling, appropriate regulation mechanisms within the educational system are needed. This makes it inevitable to build up the necessary capacities for this task in education authorities. In this context, setting-up and using effective information and data systems is of particular importance – including non-governmental education providers into a functional national *Education Management Information System (EMIS)*. Only under this precondition can a national education planning

systematically include non-governmental schools. Project assessments for programs of the German development cooperation should, therefore, in the future take into account whether and how programs can support the implementation and improvement of EMIS as well as the public regulation of non-governmental education providers.

A financial support of non-governmental schools is advised and appropriate if the provider does not work profit-orient-

ed, complies with public standards and if his educational ventures do explicitly not contribute to further social segregation. If public capacities make access to quality education impossible in the short term, contextualised recommendations for actions can be worked out that may also consider profit-oriented education providers. Measures should also promote capacity-building among public institutions so that the state can fulfil its responsibility to steer the provision of quality education for all.

# I Introduction

The importance as well as the potentials and risks of non-governmental schools are subject of controversy in the context of development cooperation. One of their advocates, James Tooley (2009), shows in his studies that these schools offer the possibility to provide education for a great number of students and to improve the quality of education. Keith Lewin (2007), on the other side of the debate, argues that private schools increase inequality and are not able to reach especially the poorest among the poor. This discussion continues on to the level of donors and international organisations. The UNESCO maintains a certain distance towards this type of schools, (UNESCO 2009), the World Bank and the British Department for International Development (DFID) assist non-governmental schools with support programmes.

This paper depicts the different shades, qualities and functions of non-governmental schools in the context of international development cooperation and reflects upon the scientific debate around the topic. It provides clarification on the definition of 'private schools' while emphasizing the diversity of non-governmental schools and offering a differentiated analysis. Only then can the potentials and risks that these schools bring with them in the context of development assistance be assessed diligently.

In chapter II, different types of schools and forms of funding that are labelled as 'private schools' or 'non-governmental

schools' are portrayed. Chapter III illustrates how the numbers of these types of schools are systematically underestimated due to different definitions of the characteristics labelling non-governmental schools. They are particularly widespread in Sub-Saharan Africa and are therefore important to consider within the development cooperation community. In chapter IV, examples are given to represent the multiple points of view in the discussion around these schools and to shed a light on their different organisational models. On this basis, chapter V weighs the potentials and risks of non-governmental schools against the EFA goals and the educational agenda of the international development cooperation. The chapter ponders the right to free basic education and the civic integration of societal groups against the often lacking possibilities in the public school systems. A closer look is taken on the discussion around the so called *low-cost private schools* that work profit oriented. Afterwards, based on different international examples, chapter VI shows how states can reclaim legal control over non-governmental schools through legislation. In chapter VII, an overview of the engagement of German development cooperation is provided followed by an evaluation of possible options for actions in this context and conceptual perspectives in chapter VIII. The concluding section of this discussion paper presents in greater detail circumstances under which a public (co-)funding of non-governmental schools, especially in basic education, is an acceptable measure if not even an advisable action.

## II Definitions, Concepts and Diversity of Non-Governmental Schools

The technical literature on the subject of non-governmental schools uses a variety of different terms for their description, which each have their own connotations regarding their historical origin and conceptual perspective on the division of labour between state and civil society. There is no internationally coherent terminology on the subject, since there are great differences in the use of the corresponding terms and in the perception of the scope and meaning of the distinctive nomenclature. Furthermore, there is no apparent international consensus on which forms of non-governmental schools should be attributed to which label. This results in an ambiguous and difficult discourse, in which the involved parties assume greater mutual understanding and clarity than actually prevails.

To begin with, the German terminology already shows a lack of clarity on its own (see for an overview: Scheunpflug 2014). At first, the differentiation seems simple: the individual federal states (meaning the federal representations of the German state) operate and fund public schools, while the German non-governmental schools are subsumed under the term 'private schools'. Now, the German wording allows for further distinction that might impede international comparability: private schools in Germany are differentiated in 'alternative or substitute schools' and 'supplementary schools'. This legal distinction concerns the curriculum as well as the qualifications that are attainable in these schools. Substitute schools perform authoritative functions of the state. They are legitimised to grant official educational degrees and are consequently allowed to issue the associated diplomas or graduation certificates. Supplementary schools cannot issue German degrees or qualifications and the compulsory schooling obligations in Germany are not automatically fulfilled by attendance at one of these schools. In Germany supplementary schools are most common in the vocational education sector (schools for interpreters, actors, speech therapy and hospital schools, etc.) but they may also be schools of general education. These are often international schools that issue international degrees. Supplementary schools can (often but not always) to some degree access public funding because they fulfil public duties in many cases. The circumstances are regulated by the German Basic Law (see chapter VI). If public funding is claimed, the school fees are capped, which means that the school cannot draw profits. School fees can only be collected up to a certain amount of approx-

imately 150 EUR, while each federal state has an individual maximum (see for 2001: Bohne & Stoltenberg 2001: p. 245). In most of the German federal states families that receive public welfare can also receive financial support for the school fees of private schools. This support scheme was installed to avoid social segregation through non-governmental schools. In Germany different types of providers of private education and different forms of non-governmental schools will have varying amounts of funding at their disposal as their providers receive subsidies and other support at differing heights (the support currently varies between 50 and 100 percent of the cost). These circumstances have led to several court actions in recent years (Saxonian constitutional court, 15.11.2013, Vf. 25-II-12).

The biggest group of non-governmental schools in Germany are denominational schools. Other important institutions in German non-governmental schooling are the Association of Waldorf Schools (which take a special position among the private schools as they are profiting from public financial support, but, due to deviant curricula, do not have the legitimisation to grant official degrees) and the 'Verband von Schulen in freier Trägerschaft' – an association of independent and private schools in Germany. Among these many schools work on the basis of progressive education concepts. They have mostly derived from parent initiatives, are not represented by big education providers and are self-supporting but not profit-oriented (Weiß 2011:9). Sometimes technical duplications can be identified among the provider and funding models, i.e. protestant schools are not necessarily schools under denominational sponsorship and funding but might be schools run by parent initiatives that gave the school a protestant profile. Such schools can then be subsumed under both denominational schools as well as schools under independent sponsorship.

The situation regarding the public providers of education is also complex. In the sector of vocational education and training a majority of schools are in a stricter sense *Public-Private-Partnerships* as dual training highly involves the industry and craft sector both conceptually and financially. In Bavaria most of the schools of general education are historically schools under municipal sponsorship and not under state authority but official statistics count them as governmental schools. In some partner countries of German

development cooperation, on the other hand, schools in municipal sponsorship are by definition private schools. In North-Rhine-Westphalia and Lower Saxony the state can operate primary and some secondary school forms in cooperation with the church. Parents can decide via majority vote whether a formerly public school should become a public denominational school or whether a denominational publicly co-funded and operated school should become a school without an official religious affiliation. This means that in both federal states a 'catholic' school can either be a public or a private school. This fact makes it necessary to not only use the terms 'catholic' or 'protestant' school but to specify whether the school is a 'catholic school under public sponsorship' (=public/governmental school) or a 'denominational school under catholic sponsorship' (=non-governmental school).

Some publicly funded schools operated by non-governmental education providers reject the label 'private schools'. They view themselves as public schools regarding their mission and their funding (see the statement of the Protestant Church in Germany 2008: 42ff.). German funding of schools is always a form of mixed financing. On the one hand, the specific financing body that has to take care of a school's building, its premises and its means of transportation can either be the municipality, the administrative district or the county, depending on the type of school. The federal state, on the other hand, is responsible for the teachers' salaries and their education and training.

This degree of complexity is also reflected on the international level and leads to a variety of distinctions between governmental and non-governmental schools. Generally, schools that don't receive any public funding are considered 'private schools'. The technical literature for the development sector distinguishes two different forms: private schools that are profit-oriented, highly socially selective and charge high school fees, and so-called *low-fee-private schools* that are primarily non-profit-oriented. These schools are predominantly found in very poor areas where the government does not provide sufficient or any educational services at all, so that these school forms appear more attractive. For a number of years, the number of *low-fee-private schools* drawing profits has been growing. These are often called *low-cost schools* (Riep 2014). Many developing countries have legal regulations that would allow for public refinancing of non-governmental schools, but in many cases this is not put into practice. As a result, more and more *low-fee-private schools* operate motivated by profit. Thus, the respective institutions try to cover their costs through school fees, instead of having them refinanced. At the same time, public schools themselves charge fees in some countries.

The UNESCO defines private schools as follows: *Private Institutions [are] institutions that are not operated by public authorities but are controlled and managed, whether for profit or not, by private bodies, such as non-governmental organiza-*

*tions, religious bodies, special interest groups, foundations or business enterprises'* (UNESCO 2014: 405). What is meant by the term 'operated' is not made explicit. The World Bank accuses the UNESCO to only define schools that are not refinanced by the state as 'private' (Wodon/World Bank 2014; World Bank 2005). UNESCO underlines that it adopts the official statistics of the respective countries and therefore follows their national definitions (see also the statements in the following section on statistics). Day Ashley et al. (2014:4) define non-governmental schools as *'dependent on user fees to cover all or part of their operational and development costs'* and *'managed largely independently of the state, and are owned and/or founded independently of the state'*. The authors admit that their definition is not sufficiently discriminating in the light of the complexity of the field. They exclude non-governmental schools that are run by public bodies from their study, for example schools operated and sponsored by churches or NGOs.

These examples show: three different approaches regarding non-governmental schools lead to three different definitions. What is to be understood as a 'private school' or a 'non-governmental school' should be described in precision. Several aspects have to be taken into account:

- Who is the provider or sponsor of the educational services and who is responsible for the buildings and the staff?
- Who finances the staff and the building? To which amount?
- Who defines the school fees: the state, the provider or sponsor or both together?
- Who is in charge of supervision?
- How are the duties between government and non-governmental provider divided? Who is responsible for which parts of the school system?

The more aspects a non-governmental provider covers, the more 'private' the school is considered. Vice versa, the stronger these matters are regulated by the state, the stronger is the governmental characteristic of the school.

An assessment of these relations makes it not only necessary to examine the financing of the school but also to take the legal status of the school and its legitimisation to grant degrees and qualifications into account. A distinction must be made between 'registered', i.e. state-accredited schools (alternative schools), and 'non-registered' schools. In countries, where the general compulsory school attendance is not efficiently controlled and regulated by government authorities, the share of non-governmental schools that are also non-registered is relatively high. However, these schools will not be covered by the official education statistics.

Which conclusions are to be drawn from these considerations?

- There is no clarity on terminology regarding the subject of non-governmental schools. Therefore each case has to be assessed individually and based on the concrete local context.
- The economic and financial situation, the legal status and the official responsibilities and sponsorship in the school business are all essential prerequisites for an accurate assessment.
- To define ‘private schools’ simply as schools that are elitist and highly selective does not do the complexity of the topic justice.
- On the international level the commonly preferred term is ‘*non-governmental school*’, which will be used through-

out this discussion paper to describe a variety of schools that are not under public sponsorship or direct responsibility. Still, this distinction remains unsatisfactory if used for international comparisons because schools that are publicly (co-) funded under denominational authority and responsibility are also often identified as ‘denominational schools under public sponsorship’ or simply as ‘public schools’.

In the light of the aforementioned complexity of the topic the following illustrations on non-governmental schools will be limited to general education within the sector or formal educational institutions. Further research on the significance of non-governmental education in early childhood education, in vocational education and training and in higher education would be another valuable contribution to the expertise on the topic. However, due to the complex and diverse nature of the subject priority is given to positioning within the core of basic education first.

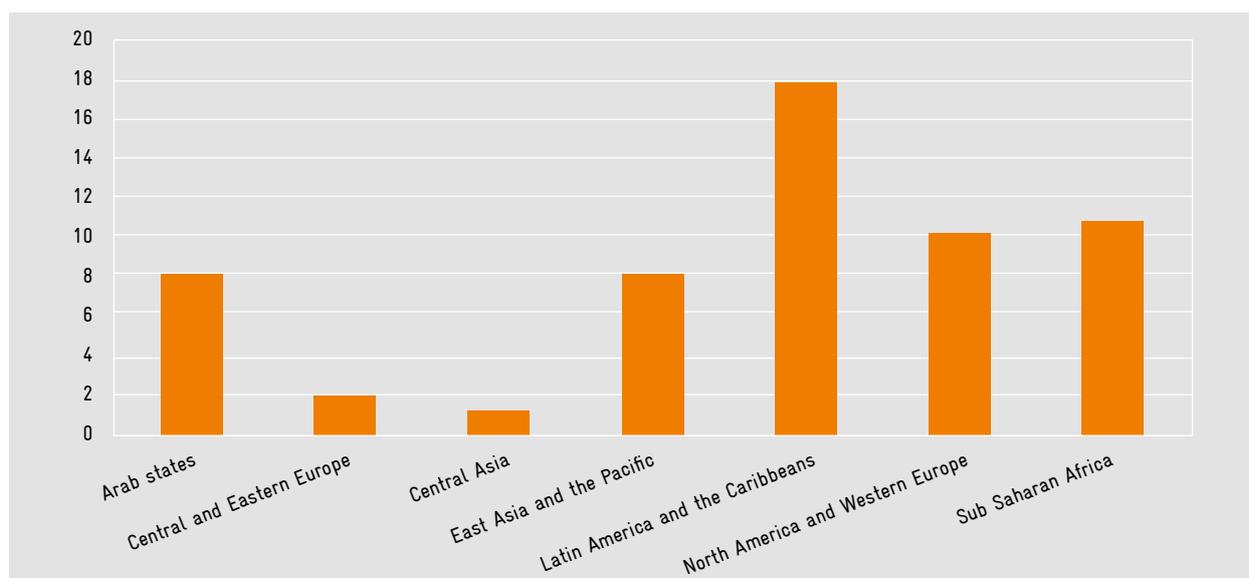
### III The Distribution of Non-Governmental Schools

In the light of the unclear distinction between public and private engagement in the education sector the expectation of a reliable statistic in this area decreases. The latter could only be realized if there were clear and standardised criteria and if the data were documented directly at the source. Differing interests of the states and their governments regarding this issue are one reason why this not possible. The Netherlands, for example, see non-governmental schools as fundamental for their liberal constitution and are interested in extending their share in the educational statistics, even if this means to re-finance them by 100 percent. States that are under pressure to reach the *Education for All (EFA)*<sup>1</sup> goals, on the other hand, are interested in showing schools in the highest possible numbers to demonstrate the public engagement in the educational sector. Therefore, these governments will count all schools as public or governmental that issue state-accredited degrees and that are supported by public sources. Many states do not monitor these differentiations, which is why data provided by UNESCO mostly reflects

the self-conception of the respective states (UNESCO 2009:164). This is one of the reasons why the share of non-governmental schools is systematically underestimated in educational statistics.

In the following, UNESCO data are used despite these statistical disadvantages to depict the share of non-governmental schools in the total number of schools in primary education (see illustration 1). It becomes clear that – taking into account the national self-conception – the share of non-governmental schools in Central and Eastern Europe and in Central Asia is relatively low. A possible explanation lies in the historically strong governmental control, the relatively weak civic engagement and the high enrolment rates during the communist era (Heyneman und Stern 2013). In Latin America as well as in Sub-Saharan Africa the share of enrolments in non-governmental schools is comparably high with 18 per cent.

Illustration 1: Share of enrolments in non-governmental primary schools as percentage of enrolments in primary schools in total.



Source: UNESCO Institute of Statistics 2012/2013; country categories as applied for Education for All; data for South and West Africa missing.

1 EFA is the worldwide action programme for education 1990 – 2015 lead by UNESCO.

A generally accepted fact is that national statistics often do not document the actual share of non-governmental schools in the system, as the respective governments are, on the one hand, interested in demonstrating their own financial engagement in the education sector and, on the other hand, do not have reliable numbers and systematic documentation of non-registered schools. This is one of the reasons why independent studies or country analyses point out a significantly bigger share of non-governmental schools. Low-fee schools make up a percentage of 28.3 percent in rural India (Pratham 2013), 59 percent in urban and 23 percent in rural Pakistan (ASER-Pakistan 2013).

It is interesting to take a closer look at the statistical problems in some special cases:

A World Bank study on the *Democratic Republic of the Congo (DRC)* claims a percentage of more than 70 percent of non-governmental religious schools in basic education (Backiny-Yetna und Wodon, 2009: 128). The DRC re-finances the salaries of all teaching personnel, regardless of the governmental status of the schools (requirement is the registration and state-accreditation of the school). Due to this reason UNESCO registered for the same year a share of zero percent for non-governmental schools, as the DRC official statistics reported exactly that number to UNESCO. After the publication of the World Bank study, the percentage of non-governmental schools was corrected to 83% in the following UNESCO statistical report (UNESCO 2014:352). The same UNESCO report documents a share of two percent for these schools in *Ruanda* for the year 2011. Our own calculations, however, indicate that this is only the percentage of profit-oriented non-governmental schools, while the total amount of non-governmental schools in Ruanda lies at around 70 percent (Wenz: publication in preparation). We found the same pattern for other countries where we collected data on, for instance, Cameroon and Zambia: in these cases all schools are registered as public or governmental schools, if they receive public financial support. In European countries all schools are registered as non-governmental that consider themselves private or non-governmental, regardless of their financing.

The conditions vary considerably among the partner countries of German development cooperation: in *Mozambique* for example all schools that had not been public were expropriated after decolonisation. Therefore, the country has no tradition of non-governmental religious schools. After the end of the civil war profit-oriented private schools emerged, especially in Maputo, and are attended by around

two percent of the school children according to UNESCO (2014). These schools' main focus is the English-speaking upper class and expatriates working in and around Maputo and most of them are members of international associations for independent schools. There also exists a vast number of schools under the responsibility of a municipality or a parent initiative that are founding private schools anywhere the state does not provide public education. For these *low-fee-private schools* no reliable data is available. One of the very few studies on non-governmental schools in Mozambique presents evidence for the impact the admission of low-fee private schools had in underprivileged city quarters in Maputo (Chiluvane 1999). The research indicated that these schools had a mitigating effect on the unsatisfying situation regarding access to education and took pressure off the authorities to build more schools. However, they did not increase educational quality and they seemed to lead to minor segregation. The study and its findings might as well be considered outdated.

While the UNESCO (2014) statistics do not report data for non-governmental schools in *Malawi*, the country certainly has its share of private schools. A large number of Malawian non-governmental schools show presence online with their respective homepages. A local newspaper (November 2014) reported about more than 2,000 non-registered schools that had asked the Malawian government for registration and therefore a sound legal status. The article also talks about 250 registered non-governmental schools, which are profit-oriented schools without financial support by the state.<sup>2</sup> The Catholic Church claims to operate more than 1,500 primary schools in the country.<sup>3</sup> Kamwedo (2013) talks about a 'substantial' share of religious schools, without specifying on exact numbers. Kombe Bunda (2013) describes the public system of re-financing churches since 1963. Protestant churches – as a consequence of the missionary history – are the second largest education provider in the country. Following these arguments the share of re-financed, non-governmental religious schools in Malawi can be estimated at around 30 to 40 percent.

The statistical problem is also a challenge for expert assessments and independent studies on non-governmental schools. For example, an assessment report by the *Ghana National Education Campaign Coalition (GNECC 2014)*, which opts against private schools, does not make any reference to the many religious schools in Ghana that receive public support. Instead, the report only counts profit-oriented, non-re-financed schools as private or non-governmental schools.<sup>4</sup> The report on the privatisation of education in

2 cf. <http://www.nyasatimes.com/2014/12/11/over-2000-illegal-private-school-in-malawi-call-for-probe/>; downloaded 15 January 2015

3 cf. <http://www.ecmmw.org/commissions/education.html>; downloaded 15 January 2015.

4 According to non-verified numbers 70 percent of the primary schools, 60 percent of the junior high schools, 65 percent of the senior high schools, 50 percent of vocational schools and 65 percent of the higher schools in Ghana are religious schools with public financing (National Conference of Unit Managers' Annual Conference Report, Accra 2014).

Morocco, as another example, does not give a single definition of private schools or of privatisation.

Brief, it becomes clear that:

- There is available statistical information on the share of non-governmental schools in international education systems. These data, however, must be interpreted with caution as the defining line between governmental and non-governmental schools is a matter of self-conception

of the different states, leading to merely relatively comparable statistics.

- For Africa it seems apparent that the numbers are systematically underestimated, especially for the schools under the sponsorship of churches and municipalities.
- Some country analyses seem to provide close approximations of the numbers, but so far, there have been no systematic studies conducted on the question of reliability.

## IV Diversity of Sponsorship Models and Profiles

As shown above a great number of sponsorship models and school profiles are all subsumed under the name ‘non-governmental schools’. In the following, some exemplary cases are described to give insight into common organisational models and for each case an assessment and advice is offered for classification of the individual sponsorship.

The following examples are sorted by sponsorship model and their non-profit or charitable status. The first cases present schools that aim at providing education for poorer parts of the population, while the latter examples focus on schools for wealthier target groups.

### **Religious substitute school: an example of protestant schools – the national bureau for protestant education (*Bureau national de l'éducation protestante*) of the council of the Rwandese protestant Christians (*Conseil Protestant du Rwanda*)**

The *Bureau national de l'éducation protestante* in Rwanda is an association of 23 different regional protestant churches (2015) that altogether operate 175 kindergartens or nursery schools, 555 primary schools and 216 secondary schools, each of the schools in the network working autonomously. While the state provides the salaries for the personnel of registered schools, the churches provide the buildings and infrastructure. Primary schools are operated by the church congregations, the secondary schools, which are usually boarding schools, are operated by the congregations and their respective church districts. The schools are open to all students, regardless of their religious beliefs. The school fees vary from school to school but usually amount to about 40 to 50 EUR p.a. Teaching staff is required to belong to the school's confession or denomination. The schools are under public supervision, follow the national curriculum and use the state-approved text books. The national bureau coordinates the cooperation with the governmental bodies and organises – supported by funds from the German development cooperation and ‘Brot für die Welt’ (Bread for the World – Protestant Development Service) – the education and training of teachers. Brot für die Welt finances trainings on peace education, democratic education and trauma work for the association in a long-term perspective. In the difficult post-conflict situation and atmosphere after the genocide, the protestant churches are highly respected and enjoy a very good reputation within the society.

Because of the state-based financing school fees remain in the lower third of the usual amount in Rwanda.

A school association or networks like the bureau in Rwanda, in which non-governmental religious schools play a crucial role, are typical for many African countries. These schools are commonly the successors of former missionary schools and are still part of the global networks of missionary societies up until today. They draw absolutely no profits from school operations. Due to the public re-financing of the teachers' salaries the school fees are relatively low. These schools are often a place of civil engagement as they are well integrated in the local civil society through church councils and parents' associations. Often, these schools take root where no or not enough public schools provide access to education, be it in conflict situations (as in the DRC as described above) or in the fast growing suburban settlements. It is programmatic for the denominational schools to promote peace education and democratic education (Scheunpflug i.a. 2015). In Rwanda it is the case that the state would not achieve the EFA goals without the non-governmental education providers and their civic, financial and organisational engagement. At the same time the states are trying to restrict the pluralism of education sponsorship models and their educational influence through regulation, standardisation and public control and supervision.

This example depicts the biggest group among the non-governmental schools, the Christian schools. While there is no official statistic on the share of Christian schools in all non-governmental schools, the percentage is probably as high as more than 50 percent of all non-governmental schools (see Jeynes & Robinson 2012; Garner, Lawton & Chairns 2005:148; Grace & O'Keefe 2007).

### **Religious supplementary or substitute school: the example of *Deobandi Madrasa* in Pakistan**

Deobandi Madrasa is an Islamic school with 350 students in Rawalpindi close to the capital Islamabad (Bano 2007: 51). While it is formally managed by a *Board of Governors*, the main responsibility for the daily operations lies with the local imam. The school is registered at an umbrella organisation for Islamic schools and follows the association's curriculum. The teaching contents combine memorisation of

the Quran and public subjects like natural sciences or mathematics and the study of Arabic and Islamic law (Bano 2007: 52). Criteria for enrolment are completion of a qualified primary school and an individual placement test. The school does not issue degrees that qualify for further public education. The madrasa is financed through material and financial donations of the local residents and refuses financial support by the government or international donors (Bano 2007: 60).

Madrasas are common among Islamic societies in the Middle East, Asia and Africa. Originally planned as explicitly religious schools, the madrasas tend to teach more and more secular topics (which make up for around 50 percent of the subjects) (Blumör 2013). In Pakistan they often find themselves in an opposing perspective to the public education system. In his research, Rahman (2008) was able to show that attendance of a madrasa correlates with a stronger tendency towards a militant mentality than attendance of other schools, either governmental or non-governmental (see also Blumör 2013). It was not determined whether this was caused by a selective effect or whether is the result of learning effects or both. In other countries (e.g. Burkina Faso, see also the discussion on the topic at ADEA 2012) the responsible authorities are in discussion whether the degrees granted by these schools or the status of the schools themselves as substitute schools should be officially recognised and accredited. In Senegal, as a special case, many of the local madrasas already get very close to public schools of general education (Wiegelmann 1994; Wiegelmann 2002). Madrasas should consequently be differentiated from non-governmental Islamic schools of general education that can be found in the Netherlands, in Cameroon and in one case also in Germany.

The described school type is an example for a non-governmental school model that will in some countries be perceived and registered as a supplementary school and in others as a substitute school. On the one hand, they facilitate access to education for parts of the population that would otherwise be excluded (some studies criticise the short-cuts in the Pakistani education sector, which are supposed to have led to an increase in madrasas, see Blumör 2013), but, on the other hand, this kind of education is usually in its own nature neither pluralistic nor promoting diversity. Public support is granted in some cases but will not always be accepted as this would imply public supervision of the schools and an obligation to adopt the state curriculum to a greater extent.

### **Non-governmental sponsorship of low-cost private schools: the example of the *Bridge International Academies* in Kenya**

*Bridge International Academies (BIA)* is a corporation that operated 359 pre- and primary schools across Kenya in 2014, by

which it has reached more than 100,000 school children. The enterprise was founded in the biggest slum of Nairobi. The so-called *'Academy in a Box (BIA)'*-model that standardises the construction and foundation of a school helped to extend the number of schools rapidly since the founding in 2009 and will be a steppingstone towards the planned expansion of the business model to Nigeria and Uganda. The teaching concept is standardised for all schools as well. By using so-called scripted teaching lesson plans can be designed beforehand by BIAs own experts, which allows the teaching staff to simply follow the instructions and lesson stages given on a tablet. In this way the schools can employ low qualified teaching personnel to carry out their function. To cover running costs the BIA charges a monthly school fee of 6 US-Dollar. The model is also supported by different international donors like the *Bill & Melinda Gates Foundation*, the *Department for International Development (DFID)* and the *International Finance Corporation (IFC)* of the World Bank Group as well as several profit-oriented Venture Funds (e.g. the charitable foundation of *Pierre Omidyar the founder of eBay*, *Omidyar philanthropics Bridge Academies* or *Pearson Education*). The schools were founded by Jay Kimmelman, who previously provided US-American schools with software for competence tests, then bought the company Edusoft and then went on to found the school chain, together with the Canadian Phil Frei and the US-American Shannon May.<sup>5</sup>

The school is an example for a profit-oriented, non-governmental school in the *low-fee*-segment. Through size, efficient use of technology and modern management (like mobile payments for school fees) of the school chain the company is able to provide access to education for very little money. The question whether these schools actually achieve this goal is under controversial discussion (see the following chapter).

### **A local NGO: the example of the *Burmese Migrant Workers Education Committee* in Thailand**

The *Burmese Migrant Workers Education Committee (BMWEC)* is a community based organization (CBO) that is operating 24 primary schools and one secondary school for migrants from Burma in Thailand close to the Burmese border. The primary schools are situated in scattered villages and often provide dormitories for children whose homes are located too far away for a daily journey to school. The teachers come from the respective villages as well. The schools are using a curriculum that has been developed by an international NGO and is also teaching English and the local native language (Karen) besides Burmese and Thai). The CBO has received funding from international NGOs in the past, but ever since these are shifting their project work and funds to Burma the BMWEC is trying to cover this funding gap through individual donations and

5 cf. Rangan & Lee 2010; Ball, Stephan J. (2015): 'New' philanthropy, social capitalism and education policy. In (Hg.): *Global Education Inc. New Policy Networks and the Neo-Liberal Imaginary*. London: Routledge, p. 66-93; [www.huffingtonpost.com/jay-kimmelman/](http://www.huffingtonpost.com/jay-kimmelman/), downloaded 15 January 2015.

financial contributions from the Karen diaspora in the US (own research Kaistra, BMWEC, n.d.).

These schools are an example for a transnational NGO in the self-help area that is running schools for migrant groups whose culture and language are - in the opinion of the affected groups - not sufficiently represented in the public school system. Often, the national curriculum of the country of destination of the migrants is used in order to pave the way for qualifications and degrees that will be recognised by the state. The curriculum will be complemented and enriched through teaching contents and subjects from the country of origin. This kind of school can be found worldwide.

### An international NGO: the example of the primary and secondary school *Mileniumi i Tretë*, Pristina/Kosovo

*Mileniumi i Tretë* is a non-governmental school founded in 2005 by the *Kosova Education Center (KEC)*, a local NGO from Pristina, which focuses mainly on teacher training and education. The KEC was founded and funded by the Soros foundation but is also receiving financial support from many international development donors. The school is among the higher segment of the country and can take in about 500 students. It has an excellent infrastructure and a comprehensive range of courses. The school fees lie at about 2.300 EUR p.a. The school is member of the initiative 'Schools: Partners for the Future' (PASCH) by the German Federal Foreign Office that is supporting 1.700 partner schools with close links to Germany via the Goethe institutes. This school is an example for a non-profit, non-governmental school that is targeting a region's elite and explicitly follows a concept of democratic education in a conflict ridden environment.

### A local organisation sponsoring a school with international qualification: the example of the *American School of Tegucigalpa* in Honduras <sup>6</sup>

The *American School of Tegucigalpa* operates under the sponsorship of a private local parents' association and aims at the international elite in Honduras. The school, which focuses on English as primary language of instruction, offers its students the possibility to pursue an *International Baccalaureate, IB* as well as a broad range of extracurricular learning opportunities. The school fees amount to about

7.500 USD and an additional admission fee of 4.000 USD has to be paid per student. The school is an example for an international, non-governmental school that is working outside of the national curriculum and supervision and provides an international qualification for its students – the *International Baccalaureate*. The students and their families bear the costs for school operations jointly through their fees and financial contributions.

## Summary

It has become clear that different models for the division of responsibilities and sponsorship of school operations apply to different non-governmental schools. Illustration 2 provides a schematic summary of these relationships in the international non-governmental education sector.<sup>7</sup>

Illustration 2: Possible sponsorship and financing models for schools

Responsible bodies/sponsorship	non-governmental	'Private schools' as state-accredited substitute schools that receive full or partial financial support by the state  (E.g. state finances teaching staff; private partner finances operating costs and infrastructure/maintenance)	'Private schools' that cover their costs through financial contributions by the parents, either low-fee- or low-cost-schools in underprivileged areas or socially segregating high-fee-schools for local elites
	governmental	Public/governmental schools	Public schools in countries raising school fees and/or partially disguised fees as, for instance, examination fees
		Public	Private
Financing			

The dividing line between the individual school types is not a conclusive and stable one and may change from situation to situation. The attractiveness of non-governmental schools as shown in this illustration is influenced by the local context, for example whether the public schools legally or illegally collect additional school fees from the parents.

6 cf. <http://www.state.gov/m/a/os/1551.htm>; Download 16 January 2015.

7 Extended illustrations can be found in Patrinos et al. (2007), Rose (2006) and Steer et al. 2015 (p. 7ff.) that differentiate the school types further in profit-oriented and non-profit-oriented schools.

# V Potentials and Risks

The above-mentioned examples have clearly demonstrated the diverse nature of non-governmental schools: religious and non-religious, fundamentalist and progressive, established by wealthy individuals to serve the poor, profit-oriented and non-profit-oriented, aiming at rich elites or socially inclusive. These individual profiles and their significance for the education system entail different opportunities and challenges, which will be discussed in the following. The presented cases can only highlight in an idealistic manner some of these potentials and risks, while in reality the questions of equality, social norms and value, financing and economic interest in education raised by the examples are always interconnected and cannot be solved independently. The perception of non-governmental schools is also always influenced by the quality of the public schools. It should also be taken into account that some of the tensions in the education sector will remain irresolvable as the decisions in educational politics are always the result of complex compromise between various demands.

All reflection on the topic has to root in the human right to education as formulated in the 'Universal Declaration of Human Rights' and in the 'International Covenant on Economic, Social and Cultural Rights (ICESCR)'. These conventions declare the responsibility of the nation states to provide free and compulsory basic education and to make technical, professional and higher education generally available (Dohmen 2012 a, b). The educational opportunities have to serve the people and promote the observance of human rights. These additional demands on education and schools lead to further questions for this research.

## Access, inclusion, equality and social segregation in the education system

The first question in this context is how states can assure that the Human Right to Education can be fulfilled equally for all citizens. How can education be organised in order to give all people a chance to achieve and extend necessary competencies irregardless of their cultural, religious, social and financial background? It is crucial for the organisation of (democratic) states to apply the meritocratic principle, the appreciation for performance and achievement, when granting diplomas. For the efficient and effective functionality of an educational system it is therefore essential to enable the

whole population to have access to education, to promote inclusion and equality and to avoid social segregation. An important role for these capacities of the education system is whether and how schools are organised and financed privately or by the state.

At the foundation of the discussion lies the issue of *access* to education. Non-governmental schools can have a negative effect if the schools exercise socially segregating practices through their school fee policies. The characteristic 'school fees', however, does not necessarily mean 'non-governmental school'. In Germany for instance school fees are only allowed to a certain extent and can be re-financed under special circumstances through supplementary public welfare benefits. But in practice even in Germany non-governmental schools show mild segregation tendencies (the effect is much minor than perceived by the general public). The parent community displays a mild positive segregation effect (Standfest i.a. 2004; 2005). Studies on non-governmental confessional schools in Cameroon were also only able to produce evidence for, at best, very small segregation effects (Bergmüller i.a. 2005; Lange 2015). At the same time, the occurrence of non-governmental schools in itself can be an indicator for insufficient equality of access to education in the public school system. For Germany the share of non-governmental primary schools has almost doubled between 2000 and 2010. This was caused, among other reasons, by the closing of many primary schools in villages in Eastern Germany due to demographic change in the German society. Parents who were not willing to accept the resulting long distance travel to school went on to operating these schools by themselves as private schools. The example of Rwanda – one of the very few countries in Africa in to reach the United Nations *Millennium Development Goal, MDG* in basic education – has demonstrated that this achievement was in this case only possible through a pluralistic sponsorship landscape in education. In the light of these findings, when evaluating the potentials and risks of non-governmental schools it has to be considered how much of its financial resources a state is using for education and whether the state is using the private efforts in the school system to withdraw from its education policy responsibilities (like it is the case for Cameroon, see Scheunpflug i.a. 2011) or if the state is able to find the best possible arrangement with respect to short funds and resources in its education system.

Of equal importance is the topic of inclusion in education systems. A society relies on social cohesion and education and schools are important means of creating that cohesion. Social inclusion can arise from integration into the education system as well as from separation within the system. It is generally assumed that concentrating certain population groups in special schools (e.g. non-governmental schools) will not lead to social inclusion. Nevertheless there are many cases in which separate schools for special parts of a population can serve their protection. There is no simple line to draw in this discussion as can be seen in the example of Germany. Whereas Jewish, Sorbian and Danish minorities are commonly perceived as contributing to the diversity and preservation of the cultural heritage, schools with a Greek or Turkish profile are under constant suspicion of fostering a general cultural segregation. Just recently M. Merry (2013, 2014) pointed out the important role of non-governmental schools in the context of the right to cultural separation. For girls the right to be taught separately is a crucial condition to make use of their right to education and acquire a qualification in some countries. Consequently, the cultural context of non-governmental schools is an important characteristic for a comprehensive evaluation of their potentials and risks.

Another important societal function of non-governmental schools can be to foster public equity by disassociating a person's social origin from their chances to education and qualification. All studies conducted so far have provided evidence that private schools that are primarily targeting elites will preserve or even reinforce this nexus, while non-governmental schools that aim at a student body from the middle classes or poorer parts of the population will contribute to more equality in a society (Scheunpflug i.a. 2006). A reason for this is that non-governmental schools are often able to ensure a more effective process of learning and acquisition of competencies for their students than public schools when serving a similar population. In Germany the difference in skill and competence levels between the students from non-governmental schools (here: lower secondary schools) and those from public schools sums up to more than one school year. At the same time the 2000 PISA-study reported that the interdependence of competence level and social origin was significantly weaker for the non-governmental sector than for the public schools (Scheunpflug i.a. 2006). This seems to be caused by the observation that non-governmental schools often create a stronger bond between the parents and home of the students and the school, which leads to a greater sense of mutual responsibility and cooperation (Perry et al. 2007). In the partner countries of the international development cooperation the bond between the teachers and their school is also often stronger for non-governmental schools, which will in turn assure attendance among the teachers (Ashley et al. 2014). Another contributing factor is the self-conception of Christian schools as institutions whose aim it is to promote equality in education. Even though this mission will not be fulfilled in all cases these

values are a strong motivator for civil engagement for social justice and individual support in these countries.

The following questions summarise the observations made above for a comprehensive evaluation of public and non-governmental schools or school systems:

- Which role do non-governmental schools play in a society regarding social segregation and inclusion? Do they lead to further segregation of certain groups or are they providing access to education for formerly excluded groups?
- How public are non-governmental schools? Is their open reflection about questions of social segregation in the education system?
- Are there reasons to justify 'separation' of any kind like the protection of minorities or the support of girls and young women?
- Are non-governmental schools able to decouple social background and qualification?

### Plurality of ideological beliefs and religions in the education sector

Schools find themselves challenged by a central and ambiguous demand: as neutral institutions of education they cannot favour and support only a single religion or belief system. They have a social responsibility towards an open society, democracy and tolerance. At the same time a society needs a place where these values, which the schools are required to honour and promote, are reproduced and transferred (the so-called 'Böckenförde dilemma'; Böckenförde 1976). In this sense the promotion of a certain ideology or value system plays an important role for a school. The school will, in the light of this, simply not be able to treat all beliefs equally but has to take a stand against fundamentalism and for democracy. Regarding the 'return of the religious' it is important to consider how schools handle religious beliefs when evaluating the inclusive power of an educational system. This will lead to a more differentiated view of non-governmental schools with a religious background.

Three types of relationships between schools and religion can be differentiated, which all have different strengths and weaknesses and different historical backgrounds. The first form is the total religious permeation of the schools' organisation and agenda. This was the case for the Catholic school system before the enlightenment and is true for the described madrasas up to the present day. The second form would be the strict separation of religious and non-religious thinking in the school. In these schools religious practice and theory have their clearly defined and state-controlled place like in school church services or classes on religious studies. All other subjects will be free of any religious con-

notations (biology classes will teach evolution theory and not creationism). Viewed historically this is a consequence of the protestant reformation. Schools in Germany, the Netherlands or in Scandinavia will offer special religious studies classes in a neutral school. The third possibility is to keep the school itself absolutely free from religion and to blockade any kind of dialogue between different religions and other beliefs within the school. If this is the case then classes on religion, if they are offered at all, will not be times of religious instruction and exchange but solely a scientific examination of religions. Examples for this model are the school systems of many formerly Catholic countries in South America, France or Spain.

Non-governmental schools can take many forms depending on the orientation and self-concept of the national school system as a whole.

Religious non-governmental schools of the first kind can be found predominantly in Islamic and seldom in Christian contexts. For these institutions there is a risk of a tendency towards fundamentalist or extremist teachings, which is criticised by some for the case of Muslim schools in Pakistan (Bano 2009). However, this is not necessarily the case. Islamic schools are not inevitably extremists. Through financial support mechanisms, the obligation to follow the national curriculum and social dialogue a certain level of influence and control is possible. Those schools that are corresponding with the local norms and values enjoy a certain backing in the population. This causes families in Muslim contexts to prefer to send their daughters to a religious school and to rather keeping them away from public schools (Bano 2009). A public cooperation with these schools could support the alignment with and access to public education opportunities, although this needs to be engaged with caution.

School systems of the second kind usually lead to a smaller share of religious non-governmental schools, because religion is already an established part of the system. There are, for instance, significantly fewer private schools in Germany or Scandinavia than in France or Spain.

School systems of the third type lead to a very strong demand of non-governmental schools with a religious orientation as only these schools are the ones that allow for a religious dialogue and religious education. Moreover, non-religious schools in these systems are not necessarily ideologically neutral. This is especially important for states with dictatorial tendencies. Religious non-governmental schools can then be a way to evade this kind of indoctrination or ideology. In many cooperation countries religion is at the heart of daily life, whereas the public schools system still carries the signs of former colonial rule or passing communist regimes as schools without any religious inclination. Religious non-governmental schools can, on the one hand, provide an opportunity to cultivate religious orientations under these circumstances. On the other hand, they build a

bridge between these orientations and modern enlightened education and make it possible to cultivate and practice a plurality of perceptions. Furthermore, these schools will be particularly attractive for students if they offer individual and personal support for the children and promote democratic values and tolerance against the background of religion and in contrast to the public school system.

The following questions place emphasis on the relationship between non-governmental schools and religion:

- In what way and to what extent are religion and plurality of beliefs (defining) factors in the school system?
- How does the school system provide orientation and identity on the one hand and foster openness and tolerance on the other hand?
- Is school a place for society where norms and values are shaped that will pave the way to participate in a liberal and tolerant world society?

### Market and quality in the education sector

An important feature of every educational system and therefore also for non-governmental schools is the quality of the education provided. The work of Wössmann and others makes it clear that the existence of non-governmental schools potentially correlates with higher quality in the education system since they create competition in the education market (see for an exemplary summary West and Wössmann 2010). The contributing factors here are the greater freedom in the educational contents, the possibly better management of schools due to a higher engagement of the stakeholders and the opportunity to work based on innovative pedagogical concepts (see for Rwanda an example of democracy education in a post-conflict situation Krogull et al. 2015; Scheunpflug et al. 2015; for the case of *scripted teaching* at Bridges International Academics Commeyras 2007). An evaluation of the actually implemented pedagogical innovations is, however, not possible at this point.

Still, non-governmental schools in the partner countries of international development cooperation bear the risk of offering education of a lesser quality. These schools can often not offer the same stability, security and salaries as public schools and consequently attract less qualified teaching personnel. Especially if schools are not registered other problems may arise as these schools do not feel obliged to follow the national curricula and are not certified to grant official state-approved degrees and qualifications. Non-governmental schools that rely on donations and other private funds are also always in danger of losing their donors (Heyneman und Stern, 2013: 9).

The following questions refer to important concerns regarding non-governmental schools in this context:

- How can educational quality be assessed and measured?
- Which mechanisms are implemented to ensure quality in the public as well as in the non-governmental school system?
- How are teachers in public and in non-governmental schools recruited, trained and financed?
- How are parents integrated into the school's operations?

### On the financing of education

Usually the possibilities for the creative shaping and innovative extension of an educational system are limited due to the financial constraints within its support structures. This applies in particular for the context of development cooperation. This raises the question of how the costs of education can be allocated – taken into account the varying revenues from education – in a way that the best possible benefit for the individual and the society can be achieved.

Apart from profit-oriented schools other school forms, public and non-governmental, are in need of funds for the same assets and facilities: buildings and maintenance, equipment and infrastructure, teachers, administration and supervision of the schools, teacher training and education. Depending on the societal situation these costs are allocated to different social subsystems, e.g. when the state is funding teachers' salaries while the buildings and maintenance of the school are financed by the communities and the costs education and training of teachers are re-financed privately through study fees.

How can these costs be optimised in a way that as many school places of good quality as possible can be created at the lowest possible costs? A too strong fragmentation of the school system into many individual public and non-governmental operating bodies is likely to be inefficient just like a singular uniform school system without any competition would draw to many resources. A great problem is the situation in countries with high governmental corruption because there the public school system can become increasingly expensive as the state schools might demand additional unofficial fees apart from the official school fees. In these cases non-governmental schools can be less expensive than public facilities. Due to mismanagement of funds in Cameroon between 1990 and 2005, the national budget reported the expected flow of funds for the wages of teachers but these salaries were never paid, instead the money went through corrupt channels and got lost in the public school administration even though several lawsuits were issued (Scheunpflug i.a. 2009; 2011). Consequently, it should be assessed with great precision whether a diverse non-governmental school landscape is a sign of active civic engagement for education or whether a government is evading its obligations in financing education and is shifting this burden to other parts of the population.

So the question remains which stakeholders expect to draw which benefits and revenues from the education system. Generally, it can be stated that the highest private and societal benefits derive from early childhood education (Heckmann 2006). In many cases even the less wealthy parts of the population will pay school fees for non-governmental schools since the attendance of a public school would bear costs as well (e.g. illegally charged additional school fees or hidden costs for text books and school uniforms). In this situation private schools can be the less expensive choice due to stronger control from outside of the school and within the bodies responsible for school operations, as is the case in Ghana or Cameroon. The non-governmental schools can often offer classes of better quality due to higher teacher engagement (see for Ghana Heyneman and Stern 2013:9, for Cameroon Lange 2015; Bergmüller et al. 2013). In these cases, schools also become financially attractive. Even if these schools work as *low-fee private schools* for the broad population it is not granted that the poorest of the poor will have access to these educational institutions or make up for the majority of the student body. As brought forward by Day Ashley et al. religious schools can have a far greater outreach among underprivileged populations than profit-oriented low-cost schools (Ashley et al. 2014:46; Steer et al. 2015:22); but the data basis regarding this topic remains too small to come to valid statements and a conclusive analysis.

Dohmen (2012a, b) made it clear that the societal and individual fiscal benefits from education will differ depending on the regional context and the qualifications gained. Schools under non-governmental responsibility can hence be seen as re-investments into the education system by the wealthier classes. More in-depth research on this topic will be needed to come to robust conclusions on the effects and impacts of non-governmental schools depending on their individual systemic context. Since the societal benefits of education decline with an increase in duration of education and corresponding age and level of education, the state should consequently have a particular interest to fulfil its responsibilities in elementary and basic education and should not shift this financial burden to private investors (Dohmen 2012b: 16; Heckmann 2006; Wössmann 2008). This is also important as costs that have to be covered privately correlate negatively with educational participation (Dohmen 2012b). Dohmen also refers to voucher systems and points out that these can only be a successful measure for financing in the non-governmental secondary education sector if there are enough alternative schools and if the population has the necessary information and skill base to make use of this system. Furthermore, sufficient information that is transparent and reliable has to be available to evaluate the quality of the schools (Dohmen 2012b: 24). It is likely that in the African context these preconditions might not be given everywhere. Success stories have so far only been reported for Latin America (Dohmen 2012a: 13).

The following questions take up on the topic of financing in education in the context of public and non-governmental schools and education systems:

- Does the state meet its obligations in the educational sector? To what extent? Which percentage of the national budget is allocated to education? How efficient are the internal government structures?
- How are the costs and revenues of education distributed in the school system? Which parts of the population contribute to what extent to the educational system and how are they reimbursed for their investment?
- How are non-governmental schools contributing to the financing of education? Do they address certain parts of the population?

### Low-fee versus low-cost: the debate around new forms of profit-oriented education providers

Over the last two decades a certain kind of profit-oriented so-called *low-cost* schools has evolved, partly as a result of the progressive liberalisation and market orientation in the education sector in the USA and the United Kingdom. The described BIA schools are an example for this school type as they also rely on a financing structure based on philanthropic investments and school fees. Another very prominent proponent for this school form is James Tooley, a British school researcher<sup>8</sup> who founded the *Omega Schools Franchise* in 2009 together with Ken Donkho, a Ghanaian entrepreneur, which is operating 38 schools throughout Ghana<sup>9</sup>. These schools share some of the same features: they claim to provide education for poor and underprivileged people and they generate revenue through underqualified and underpaid teaching personnel. They both offer a *pay as you learn model*, which makes it possible to pay school fees per day (the school chains each offer a different number of school days free of charge to cover liquidity problems of the families). The organisations argue that this even enables families without any savings to send their children to a private school. Critical voices, on the other hand, argue that this could encourage a sort of educational consumerism that could directly bind education on economic evaluation criteria. Only that kind of education would be considered valuable that can be exploited economically and produces revenue (Riep 2014: 270ff.). Recent studies show that these schools' claim to especially reach the poorest parts of the

population is often not fulfilled. Rather, it has been pointed out that the costs for the school will drain a significant part of the daily income (e.g. Riep 2014, Day Ashley 2014; Lewin 2014). The meta-analysis by Day Ashley et al. (2014) only provided moderate proof of the notion that these schools will lead to better learning results, and that girls and uneducated portions of the population would have better chances to an education and a qualification. However, the researcher could only rely on very few studies for this analysis due to a very sparse research base and scientific output on this subject. This study comes to the conclusion that the badly underpaid teachers are the ones to bear the burdens caused by this school model.<sup>10</sup> In two cases Kenya legal actions have been pursued because of the poor educational quality that was violating the national education standards.<sup>11</sup>

The following questions refer to the focal points in the debate around this topic:

- How can the state be enabled to control the quality of education and to maintain an adequate standard in the education and training and in the payment of teachers?
- How can the scientific research be intensified in order to bring the heated ideological debate around the topic back to a reasonable level based on the empirical findings?
- How can it be assured that the basic education sector does not become a mere education market and that it is the long-term goal of every nation to be able to guarantee its financing?
- How can publicly financed educational institutions under public or non-governmental responsibility be organised and offer enough school places to be more attractive than schools in the *low-cost* or *high-cost* segment?
- At the same time it should be made sure that these rightfully criticised profit-oriented schools do not dominate the public opinion on non-governmental schools in general. The for-profit schools are not exemplary for all non-governmental schools, especially for schools that are non-profit-oriented, which are the majority of non-governmental schools like the religious and NGO operated schools. These schools are nonetheless also the subject of critical observation and discussion regarding their educational quality, the payment of their teachers and the private profit orientation.

8 Prof. Dr. Tooley is not only involved in the school operations, he is also firmly propagating this school model as a scientist and policy advisor, cf. Tooley 2009; Tooley et al 2010.

9 cf. [www.omega-schools.com/](http://www.omega-schools.com/), Download 15 March 2014.

10 The paper is thereby weakening the assumptions put forward in Tulloch 2014 on the efficiency of profit-oriented non-governmental schools in development cooperation.

11 cf. <http://kenyalaw.org/caselaw/cases/view/96715/> <http://kenyalaw.org/caselaw/cases/view/95484/>;

## The complex interconnections between these questions in school reality

The presented factors that shape the discourse on non-governmental schools cannot be easily weighted against each other and it is so far not possible to come to a definitive conclusion regarding their interplay. The following parameters can be underlined in the debate:

- A sufficient political will to meet the demands in education financing, especially in basic education, is imperative. In the context of the debate around the financing of the Sustainable Development Goals (among others as successors of the Education for All Goals) a norm was formulated during the World Education Forum 2015 for a binding share of a country's gross domestic product to be allocated to educational financing (cf. Incheon Declaration 2015). If the national spending falls short of a recommended minimum of four to six per cent of the GDP and or 15 to 20 per cent of the national budget, this could be an indication of the state undermining its responsibilities and shifting the burden to the non-governmental sector.
- In elementary- and basic education the societal benefits (social return) are the greatest, but the timescale for this

return of investment for a society is to be seen long-term. The individual benefits (individual returns), on the other hand, are greatest at the end of an educational career and the time between investment and revenue for the society is the shortest (Dohmen 2012a; Heckmann 2006; Woessmann 2008). These cycles have to be considered in the process of making funding decisions.<sup>12</sup>

- Quick fixes in the light of lacking public funds or insufficient political will to invest in education that will lead to high increases in non-governmental schools should not be regarded as the method of choice. In the discussion surrounding profit-oriented commercial schools the neo-liberal discourse often interprets empirical observations as desirable outlooks. But public funding should be the foundation of a basic education system, either in terms of operating public schools or of re-financing non-governmental schools (see below).
- Studies show that parents with a higher educational level will potentially place greater emphasis on education in general. Parents with a minor educational qualification focus more on location and costs of a school (Dohmen 2012a: 25). These are reliable predictors for the choice between public and non-governmental schools.

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<sup>12</sup>This is why non-governmental basic education should be considered in a different way than private higher education providers (which can, so far, not be said for the Education for All debate, cf. the lines of discussion at CMEPT 2014 or GNECC 2014).

## VI Forms of State Regulations

Governments are reacting to the previously described challenges with their historically grown control and regulation mechanisms. The following section describes some of the various regulation models for non-governmental schools. Examples are given for the legal situation in India, Malawi and Germany. The legal arrangements should not be over-estimated in practice, as the actual behaviour of the public authorities might in reality not match the law and individual rights might not be enforced. This scenario will be described for the case of Germany.

### Germany

Article 7 of the German Basic Law explicitly assures the right to establish private schools which entails that it is the state's responsibility to grant approval for the establishment of alternative private schools and to support these schools (Weiß 2011: 19). The approval and their supervision are subject to the laws of the federal states. These will grant approval (compulsory schooling can be fulfilled) if the school form, educational aims, their facilities and the professional training of their teaching staff are of equal value (but not necessarily of the same kind) to those of the state schools. Furthermore, pupils must not be segregated according to the means of their parents, which is why the maximum amount of school fees is regulated by the state. Because this leads to a situation in which the schools are not cost-covering the state has an obligation to subsidise the schools up to 60 to 90 percent of their costs (Bohne & Stoltenberg 2001: 245). The Federal Constitutional Court has made it clear that only if non-governmental schools are accessible for all citizens regardless of their economic situation the constitutional right to education on an equal basis for all parents and students has been respected and implemented to full extent (Glenn 2004: 218; BVerG 74: 40). It is also written down in the constitution that primary and lower secondary schools ('Volksschulen') can only be established for religious reasons or on the basis of an innovative progressive educational concept, which is another measure to prevent social segregation. Schools that work on a not-for-profit and charitable foundation are also entitled to tax benefits (Weiß 2011: 11). To be able to issue state-approved degrees and qualification diploma, the schools have to take another administrative hurdle and be granted public accreditation for this (Weiß 2011: 16).

The question of the right public financial engagement in this sector is continually causing legal dispute. In 2013, the Saxonian constitutional court has adjudged the parliament to increase the support in funding until the end of 2015 (Saxonian constitutional court 2013: 15.11.2013 Vf. 25-II-12).

### India

The Indian law distinguishes between three school types: *government* schools that are operated by the state, aided schools that are maintained privately but receive public subsidies and unaided schools that do not receive any funds and are therefore fully independent in their curriculum design and selection of their teaching staff (Härmä 2011: 351). *The Right of Children to Free and Compulsory Education Act (RTE)* of 2009 regulates the access to non-governmental schools. It stipulates that *government schools* have to provide free education for all children. *Aided schools*, which mostly provide secondary education, have to be open free of charge to at least 25 percent of all schoolchildren (Kingdon 2005: 22). At *aided schools* at least 25 percent of the first-graders have to come from underprivileged classes and groups whose composition is also prescribed by the authorities.

This legal regulation depicts the reality at many schools and tries to minimise the selectivity of schools through a quota. There is no research available on whether this standard is reached or fulfilled and in what way these measures actually lead to less social segregation.

### Malawi

The Malawian constitution of 1994 (section 25) explicitly permits non-governmental schools (Section 25) as long as they are registered and their quality is not inferior to that of state schools (Ng'ambi 2010: 33). Similarly to the Indian law the *Education Act 2012* distinguishes three school forms: *government school*, *assisted school*, *private school* (section 33) and allows the two non-governmental types if they possess ministerial approval (section 32). Criteria for the approval are basic standards for facilities and accommodation, personal eligibility of the owner and no access limitation regarding enrolment and employment (section 36). Also, the curricula and the teaching materials have to be approved by the state (section 81,8). The

schools are allowed to continue to charge school fees to cover their costs – in 2010 these ranged between 247 and 2,470 US-Dollar (Ng'ambi 2010: 56). A public subsidisation is at the sole discretion of the Ministry of Education, Science & Technology (Section 11). The previous school law of 1962 was only inconsistently enforced. Non-registered non-governmental schools were tolerated for a long time (Ng'ambi 2010: 7) but were then intended to be closed to a large extent by 2010 (Ng'ambi 2010: 35), which has not been fully enforced up to today. It remains to be seen whether the implementation of the *Education Act* 2012 will be a success.

This shows that there is no clear rule for the financial engagement of the state in the non-governmental school sector and that the registration is not enforced adequately. This is difficult for the students and schoolchildren as the acknowledgement of their qualifications is hence not guaranteed automatically.

These reflections make clear:

- The question whether non-governmental schools promote social segregation can be a matter of constitutional concern.
- Transparent criteria for the approval and non-approval of non-governmental schools that are not only arbitrary judgements of a ministry are useful as they create legal certainty but they are not the norm.
- The example of Malawi shows that there is often a considerable gap between rule of law and legal reality as the funds for non-governmental schools in Malawi are not in all cases disbursed.

## VII Non-Governmental Schools in Development Cooperation

The promotion and support of non-governmental schools plays a relatively minor role in German development cooperation.

The KfW development bank currently supports non-governmental schools only to a limited level. Still, the finance institution pointed out its openness towards engagement in this sector under certain circumstances in several strategy papers (KfW 2004; KfW 2011). Examples for the financial support of non-governmental schools are the programme ‘Construction, fitting and rehabilitation of Methodist church primary and secondary schools in Ivory Coast’ or the ‘Programme for the improvement of science teaching in church secondary schools in Tanzania.’

The focus of Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in the context of formal education is cooperation with public school systems. There is, however, also experience with NGOs as service providers for state programmes for children and young adults who have had no access to formal education and therefore need to ‘catch-up’ on their basic education (for example the *Complementary Basic Education Programme* in Malawi).

The Federal Ministry for Economic Cooperation and Development (BMZ) supports projects at non-governmental schools in cooperation with German NGOs or the Central Agencies for Development Aid of the churches. While the central aid agencies of the churches receive these funds in the

majority as global funds, the NGOs will apply for funds on individual project basis. NGO projects are for the most part infrastructure projects building schools in underprivileged areas. These facilities will usually be handed over to a public or a private sponsor who will operate the school. If the latter is the case, the funding usually comes from a mixed financing model in which, for example, the state will cover the costs for the teaching staff. Christian non-governmental schools receive most of their support from the aid agencies of the Catholic and Protestant church; Bread for the World for instance sponsors teacher training programmes for protestant non-governmental schools and provides 20 scholarships for professionals responsible in this education segment for a master’s degree *Educational Quality in Developing Countries*, which is supported by the University of Bamberg and offered in cooperation with the *Protestant Institute of Arts and Social Sciences* in Ruanda (Krogull und Scheunpflug 2015).

### KfW project example Ivory Coast

Under the umbrella of the Methodist Church of Ivory Coast the construction, fitting and rehabilitation of church-run primary and secondary schools and pre-school classes was financed in the Abidjan area and partly in rural regions. Through this measure around 7,000 children shall gain access to a qualitatively better school education. Internal cross-subsidisation makes it possible that poor families can afford the school fees as well. BMZ provided a total of about nine million euros for this purpose.

# VIII Conclusions

Non-governmental schools are widespread among many of the partner countries of the German development cooperation and contribute to a considerable extent to the educational offers in these countries. This includes profit-oriented educational programmes as well as those that are not under any state regulation or control. The international community is in discussion about this topic and how national governments and donors should react to it. Final answers for the question of how to approach the topic of non-governmental schools can only be given in the light of a specific national context and after a comprehensive assessment of the situation of the respective education system. Some underlying conclusions and observations can, however, be offered.

## Maxims

- In the view of the BMZ (see BMZ education strategy paper) – in accordance with human rights norms – basic education is a responsibility and duty of the state. The state has the obligation to ensure high-quality basic education that is accessible for girls and boys alike and that is compulsory and free.
- Non-profit non-governmental schools can make a considerable contribution to social plurality and civil engagement in the education sector.
- Non-governmental education offers shall not lead to a situation in which the state is withdrawing from its responsibility for the education system.

## General recommendations

### *a) Definitions and data*

- A nationally and internationally more differentiated understanding of the manifold forms and models of ‘non-governmental schools’ or ‘private schools’ is desirable.
- Based on this, quantitative and qualitative data on the different models of non-governmental sponsorship of schools (with re-financing and without) should be collected for national and international statistics in order to gain clarity on the relevance of these schools for the individual education system. On the national

level it is necessary to understand the structure and interplay of different actors in the field and to create a basis for public supervision and regulation. On the international level this data can be used as an instrument to advance current research and provide a foundation for future alignment in international development cooperation.

### *b) Target groups and social segregation*

- Non-governmental education providers can make a considerable contribution for the inclusion and equal opportunities of marginalised groups (e.g. children from rural areas or urban slums, children with disabilities, religious or cultural minorities).
- Non-governmental schools that imply the promotion of certain elites have to be object of differentiated analysis as well. On the one hand, they can have a positive impact on the educational landscape if their support and stimulation flows back into society (e.g. through the education and training of future merit and leadership elites), on the other hand, they can bring one-sided advantages for some parts of the population and the discrimination of others with them. In this context, private schools have an obligation to make their contribution to more social inclusion visible.

### *c) Civic and societal plurality (religion, democracy and pedagogical innovation)*

- It is the objective of every school to ensure that human rights are observed in the school context, this naturally also applies to non-governmental schools. It is the responsibility of the state to assure this for all schools, public and non-governmental alike.
- Non-governmental schools can make a difference for the plurality within a society: they can – as an alternative or supplement to the state school system – make specific offers for social minorities (based on religion, language or culture) and for children with special educational needs. These services can potentially have a positive impact on the development of democratic competencies and pedagogical innovations.

- Schools should create social spaces in which religion and enlightenment can engage in dialogue to pave the way for a more differentiated understanding of religion. This applies to both public and non-governmental schools and must be a basic aspect of regulation in the school system.

#### *d) Financing (and profit-orientation)*

- Regarding the public financing of education it is recommended to use the following four benchmarks as orientation: four to six percent of the GDP and/or 15 to 20 percent of the national budget should be invested in education.<sup>13</sup> The amount of national public spending on education is a clear indicator for whether a state fulfils its obligation to provide (basic) education.
- Mixed financing concepts, i.e. the (partial) re-financing of non-governmental schools through the state, are an acceptable option as long as the education provider works not-for-profit and the public funds do not disperse into the private profits.
- Non-profit education providers and their funding partners like churches, foundations, NGOs and companies are an important part of the system as they lever additional financial means for the promotion of the educational sector and strengthen civil engagement in this area. Financial contribution by surrounding municipalities and parent communities to schools are also acceptable if they are brought in voluntarily by the parents.
- Profit-oriented non-governmental schools can pose as a suitable supplement to public schooling if they underlie public regulation and comply with national standards. They should, however, not be considered as a justification and means for lacking engagement of the state to provide appropriate public education. A public-private mixed financing of these schools should be refused out of the aforementioned reasons.
- Funding of non-governmental schools through official development assistance (ODA) is to be advocated if the education provider is not working profit-oriented and operating in accordance with the education ministry. It should be refrained from financing solely profit-oriented educational offers through ODA channels.

#### *e) Control and regulation*

- National legal frameworks that entail minimum requirements for education facilities should be implemented and based on international human rights conventions. A

public supervision system has to control the institutions based on these laws and norms (UN-Human Rights Council 2015: 3).

- References on the relevance, regulation and support of non-governmental schools should be included in national education plans.
- Education ministries should offer the opportunity of accreditation to non-governmental education providers that build their programmes and educational contents (e.g. the learning goals and respective competencies, curriculum) on the public requirements in order to provide their students certification of their competencies and skills.
- Incentives could be proposed for the establishment of non-profit non-governmental schools in areas with a high demand in order to ensure an adequate distribution of educational offers.
- In the case of public-private mixed funding the regulations should comprise that private schools charging school fees have to offer compensation mechanisms for poor families. As a basic principle the state should assure that non-governmental schools will not lead to greater social exclusion and to the perpetuation of social inequalities.
- If non-governmental education providers are co-financed by the state, requirements for the qualifications and basic conditions for teaching personnel and other school staff should be set.
- As non-state education providers play an important role in many cooperation countries, the topic should be addressed more intensely in further education and training courses for ministries of education and other public institutions in this sector – especially with regard to the development of policies, the proper collection and management of data and statistics and the assurance of national quality standards.

### **Recommendations for the positioning of German development cooperation**

- German development cooperation should be committed to setting a more prominent position for this topic on the international education agenda and to promoting a more differentiated discourse of non-governmental schools. Besides the basic education segment other sub sectors of education (i.e. vocational education and training and higher education) should also be scrutinised as subjects of further research.

<sup>13</sup>This norm is based on the international debate around the topic, for example the 'Muscat Agreement' of 2014, Target 7, cf. <http://www.uis.unesco.org/Education/Documents/muscat-agreement-2014.pdf> or the EFA GMR Policy Paper 18, March 2015.

- A nationally and internationally more differentiated understanding of the manifold forms and models of 'non-governmental schools' or 'private schools' is also desirable.
- In accordance with the above mentioned maxims, German development cooperation supports governments in shaping and building education systems that guarantee quality and free basic education for all children. This is seen as the biggest and most important contribution of German development cooperation at the moment and in the future. The question whether and to what extent non-governmental schools should be considered in development cooperation should depend on whether the state fulfils its educational obligations, whether the governmental authorities invest a sufficient part of their gross national product in education and schools and whether they re-finance the non-governmental schools proportionately.
- In order to both a) use the potentials and b) address the challenges of non-governmental schooling (especially profit-oriented or non-democratic forms), appropriate regulation mechanisms within the educational system are needed. This makes it inevitable to build up the necessary capacities for this task in education authorities.
- It is required to set up effective information and data systems – i.e. the inclusion of non-governmental education providers into a functioning national *Education Management Information System (EMIS)*. This is essential if national educational planning is to systematically include non-governmental schools. In the future, project assessments for programs of German development cooperation should therefore take into account whether and how programs can support the implementation and improvement of EMIS, as well as the public regulation of non-governmental education providers.
- A financial support of non-governmental schools is advised and appropriate if the provider does not work profit-oriented, complies with public standards and if his educational ventures do explicitly not contribute to further social segregation. If public capacities make access to quality education impossible in the short term, contextualised recommendations for actions can be worked out that may also consider profit-oriented education providers.
- Measures should also promote capacity-building among public institutions so that the state can fulfil its responsibility to steer the provision of quality education for all.

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