

**Equality of Education -
A Comparative Study of Educational Ideologies of the
World Bank and the Governments of Zambia in 1971 -
1996**

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The study deals with the question of equality of education in the global education politics. The object of the study is the educational ideology of the World Bank and the Governments of Zambia during 1971-1996. In the ideology of education the main focus is on the question of equality.

The theoretical framework of the study is based on Torsten Husen's analysis of the changing conception of equality of educational opportunity. The primary study material has been analyzed using Husen's model of three major stages in the development of conception of educational equality. These are (1.) the conservative, (2.) the liberal, and (3.) the new conception of equality of educational opportunity.

The study introduces rather extensively the activities of the World Bank and the Government's of Zambia in education sector. This study work of earlier interpretations of these actors' activities has influence significantly the selection of the theoretical framework and the study methods.

The main concepts of the study are ideology, equality, education politics and education policy. Education politics and policy are analyzed in an unusual way by reflecting education policy to wider social and economical policy in both national and international level. The study is based on the idea that education is a crucial factor in social and economical development.

The method of this study is qualitative interpretation of textual material. Kari Palonen calls the method eksegesis. The idea is to take apart interesting meanings from the text and interpreted the text in context. As a part of the interpretation the study is focusing on authors and audiences of the policy statements. The textual policy statements of the World Bank and the Government of Zambia are the primary research material. Number of other documents and policy analyses of the field are used as a secondary research material.

The findings of the analyze show that during the era of the 1971-1996 the conception of equality of education in the World Bank and the Governments of Zambia have changed. The changes do not follow Husen's steps from conservative, through liberal, to the new conception. In most of the cases the documents mix elements from two different conceptions of equality of educational opportunity.

The authors and audiences of the documents have changed, as well. These changes are reflecting the transformation of the context - when the context is new there are new documents written by new authors addressing them to new audiences. The changing authors and audiences are categorized to explicit and implicit. During the period studied the role of the authors and the audiences has been changing from being implicit to be explicit and from being explicit to be implicit.

Keywords: equality of education, The World Bank, Zambia, education policy, educational ideology, development cooperation,

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Acknowledgment: to my loved one and a partner, Andrea Botero Cabrera.

INTRODUCTION

'Education for all' must have been one of the most commonly used phrases in the global education politics of the 1990's. The users of the phrase are mostly backing on the United Nations' Declaration of Human rights, but also on economical factors. Education, and especially general primary education, has been seen as a one of the key factors in the economical development.

In the 1990's The World Bank has been the largest single source of external finance for education in developing countries. In the last thirty years the Bank has continuously expanded its finance for education. From the World Bank's point of view, educational institutions financed by the Bank should be able to pay off the debts. The Bank has seen education as a good target of investments with potential returns, just like any successful business-oriented enterprises.

In most regions of the world, however, schools and universities are not business-oriented enterprises. In many countries education is valuable for the reason that it gives people possibilities to develop as human beings: to fulfil emotional, psychological, intellectual and spiritual needs. The economical profit is seen as secondary benefit of the education. Especially in developing countries, that got their independence in early 1960 and were ideologically socialistic, the role of education has mostly been seen from the point of view of human and social development.

Who should pay the human and social development, which is primary focusing on emotional, psychological, intellectual and spiritual needs instead of economical needs? In a way the human and social development should lead giving up economical needs. The 'payers' of this kind of development should be the people themselves. In an ideal society the people are 'so educated', 'so intellectual' and 'so spiritualized' that after fulfilling physical basic needs they do not desire further economical growth.

To educate citizens without any material needs over basic needs use to be the state ideology of the Zambia from the early 1960's to the late 1980's. In the early years of independence the Zambian educational system was based on the state's ideology of Socialistic Humanism. The independent educational system was young and ambitious. The believe on education in the national development was strong. After the economical crises in the late 1980's and the early 1990's the ideological background collapsed and changed the official social, economical and political ideas and goals. Also the educational thinking had to be changed.

This study deals with the question of equality of education in the global education politics. Even though the main focus is on the World Bank and the Governments of Zambia the study should be considered in the wider contexts. The time scale considered in this study is relative wide. The study covers the period from the early 1970 to the mid 1990. During this period the world politics and order changed from the partition into three worlds to be a collection of dozens of 'worlds': information societies, post-industrial countries, industrial countries, transition societies, less developed countries, developing countries etc. Since the late 1980's a strong believe on market capitalism with liberal democracy has

wiped out socialistic ideology. At least the fellow travelers and followers have told that global free markets and economy will lead to everyone's wealth and happiness. The globalization is effecting on everything; the educational systems in general and the questions of educational equality in particular are not either out of scope.

The philosophical approach of this study is agnosticism. This means, the study is trying to understand the phenomena of global educational politics rather than to explaining it. The goal is to analyze different point of views; different earlier interpretations, rhetoric and argumentation presented in the global education politics. At the same time the study is taking part in this discussion by presenting one more interpretation of the phenomena. The purpose is to be an analytical text about educational texts in a specific context. Finally this study will end up being one of those texts and maybe a part of the same context, in relation to further texts.

The study contains seven chapters. The first chapter introduces the conceptual framework and theoretical approach of the study. This framework consist of theories of educational politics and policy, and introduces Torsten Husen's (1972, 1975) analysis of the changing conception of equality of educational opportunity. The Husen's model is used as an analytical framework in the analysis of the political texts. The second and the third chapter present the context in which the actual education policy statements of the World Bank and the Governments of Zambia were written. The fourth chapter introduces the objects of the study, the data collected and the actual research material - the political texts of education - which were analyzed in this study. The fifth chapter deals with the methods of analyses by introducing the mode of decoding and interpreting political text and ways to analyse argumentation, audience and author of the texts. The sixth chapter introduces the study results. The chapter displays an interpretation of conception of equality of education presented in the education policy statements of the World Bank and the Government of Zambia.

Each statement is introduced by reflecting them to Husen's model of various conceptions of equality of education. The chapter of the study results proceeds by introducing the results of the analysis of the audience and author of the statements. The picture of the changing audience and author of the statements aims to clarify the changing conception of equality of education presented in these statements. The conclusion, chapter seven, discusses global economics affecting the conceptions of equality of education. The chapter aims to provoke discussion around global economics and equality in the context of education.

1. CONCEPTUAL FRAMEWORK

1.1. Introduction

The present chapter introduces the main concepts and the theoretical approach of this study. The chapter starts by defining the concept of politics and policy. The focus in the first part is especially on politics and policy of education. The chapter proceeds by introducing the concept of ideology in general and the concept of educational ideology in particular. The chapter ends up introducing the changing conception of equality of educational opportunity. In the introduction of the main concepts, the chapter puts forward the theoretical approach of the study.

1.2. Politics and Policy - Politics of Education and Education Policy

According to famed Aristotelian definition politics is a way to take care of common affairs. In this definition politics is a process of producing and maintaining 'good life' for the members of the society. Thus politicians, the decision-makers, work for the benefit of the people in general. Another well-known, more critical way to study the phenomena is to approach politics with the concept of scarcity. Scarcity can be define to mean everything material and symbolical benefit, valuable for people, but limited in a society.

To divide the scarcity existing in the society people need to make decisions on it. The formulation of decisions on dividing scarcity can be called political action. When politics is defined as a way of dividing scarcity it is reasonable to ask who will get and what, how much, when and in what form? Thus politicians, the decision-makers, work just for the benefit of the people they represent and so the concept of politics is closely related to power. Different actors and groups have different values and ideas and the politics is a way to settle these values and ideas so that all members of the society will acquiesce in them, in a way or another. The process where scarcity is divided by using power can be defined as politics. (Easton 1965, Lehtisalo 1986, 31-32 and 1992, 28-30)

When the decision considering the questions of who and how much everybody will get has to be made, someone needs to define by whom the scarcity will be delivered, where and how. Answers to these questions should be found from the policy. When the politics are closely related to power, the policy is the actual operation and action where the scarcity is divided. Thus the politics is the process where different ideas and values are formulated to be the policy: the plan on how to realize the ideas and the values ended up in the politics. To reach the goals resources must be found, action must be organized and some system must be created to evaluate the process to be sure that the course chosen is right and will end up to the right goal. All these actions can be define to refer to the policy. The politics, however, exists also in every policy, as in every single decision and choice made, and in every strategy formulated there is a possibility to use power by changing the course. (Lehtisalo 1986, 33 and 1992, 30)

Around the same issues Kari Palonen (1988) identify two main conceptions of politics. The first conception, which can be called the harmony perspective, finds

politics as a way to treat the common affairs in the society. Characteristic to the harmony perspective is the fact that it is a useful, and widely used, way to legitimize the decisions made. The other conception of politics can be called the conflict perspective. This means that in the phenomenon of politics there are always different ideas and points of views. Thus to talk about politics can not be done without facing opposition and opponents. The conflict perspective also leads us to understand the politics as a phenomenon open to different interpretations. This means that since the politics can be considered as a phenomenon that can not be seen with the naked eye or touched with the hand, it can be talked only as a subject and a result of an interpretation. The material, where the politics can be interpreted and explained is the policy - the programs, the plans and the actual operation. In this way the study of the phenomenon of politics is an interpretation of the policy. (Palonen 1988, 13 - 20)

Politics of education is a process where different values and ideas of different interest groups considering education are estimated and deliberated. The policy will then reflect those values and ideas in power (Lehtisalo 1986, 32 and 1992, 28-29).

Education policy, the program, the plan, includes a number of choices done during the political process. The choices done are all based on some conscious or unconscious structure of values. Thus the interpretation of political decisions should always be done in proportion to the structure of different values at the time where the decisions were made; to those values in power and in those in general at that time. This means that, all policies including education policy are always tied up to some historical era. Thus education policy can be described and interpreted - perhaps even understood - from some political, economical or social point of view. Naturally also in the background of education policy there is the complicate set of factors affecting on all human thoughts and function. (Lehtisalo 1986, 37 and 1992, 33)

In this study the concept of *politics of education* will be used to refer to all that function and aspiration where all the different interest groups - international, national, governmental and non-governmental - are trying to affect on the direction of education in some society or in the international community. The interest groups are trying to affect on resources, structure, process, content and product of education. (Lehtisalo 1986, 34 and 1992, 31)

The concept of *education policy* will be used to refer to those programs and plans considering education, which are written and carried out by the governmental or non-governmental interest groups in the society or in the international setting, to reach the aims, ended up in the politics of education.

1.3. Ideology and Educational Ideology

The most common definition for the term ideology is to claim that it refers to some certain belief system or specific sets of ideas. However this does not mean that all set of ideas would be ideological. For instance someone may have unusually inflexible beliefs of how some events of everyday life must be carried

out, such as how to behave at the dinner table or how to brush teeth. It would seem strange in most circumstances to call such views ideological even that some systematic beliefs and set of ideas of everyday activities may also refer to ideology. For instance the decision of not to eat meat may be based on the practical reason that vegetarian food tastes better, but it may also be based on other more ideological reasons. Someone may choose vegetarian food for the reason that it is more economical to produce than meat, and so vegetarianism may help to solve such global problems as lack of arable land and dearth of food. Some people may see vegetarianism also as an ideology to solve over population problems in the world. Likewise someone else could make an ideological decision to eat as much meat as possible to use as much arable land as possible to solve the same problem as the vegetarians. The meaning of eating a lot of meat could be that the person believes on 'natural elimination of excess population' and trusts that the lack of arable land will naturally slow down the growth of population in the world. Some rigid set of ideas and belief systems may be based on some practical or ideological reasons or both. The set of ideas is ideological only if it is based on some question of society and social life. In other words, the term ideology makes reference not only to systems of beliefs but it also refers to questions of power. (Eagleton 1991, 5)

From the point of view of power the most well known way to define ideology is to claim that it has to do with legitimating the power of a dominant social group or class. In his book 'Sociology' Anthony Giddens defines the concept of ideology as follow: 'shared ideas and beliefs which serve to justify the interests of dominant group. Ideologies are found in all societies in which there are systematic and engrained inequalities between the groups. The concept of ideology connects closely with that of power, since ideological systems serve to legitimize the differential power which group holds.' (Giddens 1993, 742)

According to Terry Eagleton (1991) a dominant groups' process of legitimation of its power involve at least six different strategies, as follow: 'A dominant power may legitimate itself by promoting beliefs and values congenial to it: *naturalizing* and *universalizing* such beliefs so as to render them self-evident and apparently inevitable; *denigrating* ideas which might challenge it; *excluding* rival forms of thought, perhaps by some unspoken but systematic logic; and *obscuring* social reality in ways convenient to itself' (Eagleton 1991, 5-6). The definition of ideology which concern only the ideas of dominant power withdraw outside all such belief systems of social life and society not in power. As the body of ideas characteristic of some particular social group or class are related to society or humankind as whole (for instance: if all human would be vegetarian, there would not be dearth of food), in power or not, they can however be calimed to be ideologies. (Eagleton 1991, 6)

Reidar Larsson (1994) has specified essences of political ideologies in a nation-state. He has said that when ideologies are compared to each other observation should focus on such questions as: how the society should be direct? How much a state should interfere on citizens life and how citizens should be controlled? How and on which customs society should be changed? How should economy

and economic life be organized? And how do the ideology present a good society or an ideal society? Important in ideologies are also the basic values they support, the way they understand the nature of human being, what do they define as a most essential political unit of the society - individual, family, class, race or nation, and what should be the economic organizations of the society. Finally for every ideology it is characteristic that they present some outlook of the perfect society they aspire after. The study of ideologies is comparing ideologies by describing them with above factors and by find out how do they present arguments on these questions. (Larrson 1994, 15-20)

Ideologies can not be considered with out referring to the discussion of the end of history of ideologies, which was fashionable in social sciences in western world during the late 1980's and early 1990's. The collapse of Soviet Union and the socialistic block woke up western intelligentsia to claim that the struggle of ideologies is over and the liberal democracy with capitalistic economic has proved to be only reasonable and vigorous ideology of state for all countries in the world. In his book 'The end of History and the Last Man' (In Finnish: Historian loppu ja viimeinen ihminen) Francis Fukuyama (1992) presents the idea that today there is no more universal ideologies, which could compete with the liberal democracy¹ where the legitimacy of power is linked with the sovereignty of people. Monarchy in its different forms has been won largely already in the beginning of this century. Fascism and communism, which has been the main rivals of liberal democracy during this century, has both spoiled their reputation. Beside liberal democracy Islam is today the only living ideology with universal ideas of morality, social and political order and justice. As liberal democracy, Islam is also universal in a sense that it is presented for all people in general - not only for some ethnic or national group. It seems, however, that in time the liberal democracy will win the struggle with the Islam. During the last two centuries a number of influential Muslims has turn to support liberalism and democracy while the success of Islam in liberal world has been minimal. The possibility that Islam would reach notable approval in Berlin, Tokyo or Moscow seems very unlikely (Fukuyama 1992, 77-78)

The victory of democracy in last thirdly years is a fact. In the last thirty years the number of countries with democratic constitution has doubled. In 1975 there were altogether only 30 liberal democratic countries², but already in 1990 the number of liberal democratic countries was 62 (Fukuyama 1992, 80-82). According to Fukuyama people in western world are living in a situation in where they are no

1 With the liberalism Fukuyama mean political liberalism where the state recognize by law some basic rights: (1.) Individual right includes the freedom of control directed to individual personality and property, (2.) Freedom of religion means individuals right to express and act religiously, (3.) Political rights include individuals right to act politically free, the liberty of speech and the freedom of the press.

(Fukuyama 1992, 74 referring to James Bryce)

2 In this classification to be a 'liberal democracy' the country needs to fulfil the following conditions:

(1.) a liberal market economy, (2.) representative democracy, (3.) external sovereignty, and (4.) judicial system, which ensure civil rights for all citizens. (Fukuyama 1992, 421 referring to Michael Doyle)

more able to think on a society which could be absolutely better than the capitalistic, liberal and democratic society they are living in. In our time the humankind has reach the end of history of universal ideologies. (Fukuyama 1992, 78)

The concept of educational ideology can be seen as a sub-concept of ideology. In a Finnish 'Dictionary of Educational Science' (Kasvatustieteen käsitteistö) the concept of 'educational ideology' (in Finnish: kasvatustieteellinen ideologia) has been defined as a set of ideas of education which create the basis of decision making and ideas of education in the society. Educational ideologies are always a set of ideas of some group. Thus to speak of one person's educational ideology is meaningful only when considering the person as a representative of some specific group. An educational ideology contains opinions of most primary questions, such as role, purpose and aims of education in the development of society and humankind in general. (Kasvatustieteen käsitteistö 1983, 74)

The education sector is a good example of a collection of different political questions which in all levels, from the classroom level to ministry level, are closely related to values. A universal ideology, such as capitalism or communism, which are mostly a set of ideas and believes of how economy should be arranged, don't really give that many answers to solve questions of education. Even that one of the most important purpose of the national educational systems' is to serve the economic system of the nation (capitalistic, socialistic, etc.) it is not its only function in a society. The educational system should also fulfil individuals' personal development needs and further peaceful sustainable and successful development of the society. These functions of education - economics, social and individual - are all effecting upon decisions done on education. Sometimes more stress is put on economical needs and some other time on social or individual functions. This, however, does not mean that these functions should always be opposite to each other or that there could not be political decisions, which would serve all these functions at the same time.

In this study the term *ideology* will be used to refer to specific and systematic set of ideas and beliefs of some social group, governmental or non-governmental, considering society and social life as a whole. In a study of ideologies of different social groups this study focuses on a different ways they do present equality. As there are different and opposite ideologies it means that ideologies are struggling to reach a dominant position in society and in the world in general. Thus the concept of ideology is closely related to power.

The term *educational ideology* will be used to refer to specific and systematic set of ideas and beliefs of some social group, governmental or non-governmental, considering purpose and meaning of education in society. In this study the focus is on a different set of ideas and beliefs of equality of education presented in different educational ideologies. Equality of education, however, is not one separate area in universal ideologies or even in educational ideologies. The social equality, where equality of education is one part is closely related to such major social questions as equity, civil liberties, human rights, liberalism, totalitarianism, and economy.

1.4. Equality of Educational Opportunity

Equality of educational opportunity can be approached from two different points of views. It can be considered as a goal itself or as a mean in the long-range perspective of bringing social equality. The classical liberal conception of equality, on which also the UN's Universal Declaration of Human Rights³ is based on, is that all individuals are born free and equal in dignity and right without distinction of race, color, religion, national or social origin. In education the classical liberal conception of equality means that all human beings should be equal to start their life career and to take part in education. In a tradition of socialistic thinking education has been seen also as a major mean to equalize social differences. The equality of educational opportunity where all children are equal to take part in education is nowadays mostly universally accepted, but not a universally achieved goal. Also in a number of countries, education has been and still is, used as a mean to bring social equality, even that results has not been that encouraging (Rinne 1995).

From the point of view of individual in the context of education, equality can be conceived of in three ways. Firstly equality can be seen as a starting point. Equality can be seen as a state of affairs when all children start their educational career. It would mean that all children would get exactly the same living conditions from the day of their birth. Equality as a starting point is of course impossible. From the genetic point of view children evidently, even in the day they were born, are never in an equal position. People, both children and their parents, are differently equipped genetically and so some children are in a better state from the day of their birth and will be treated (at least by their parents) differently. Secondly equality can be conceived as a treatment. Everybody, irrespective of her or his genes and social origin should be treated equally in various ways. For instance everybody could be equal in law or a state could guarantee everybody a minimum income or subsistence allowance. In education sector these situations would mean that a single system of formal pre-school and regular school could take care of all children alike. Evidently, however, an 'equality of treatment' in comprehensive school systems has not really increased equalization among adults. Thirdly equality can be seen as a final goal - or as a combination of these three: starting point, treatment and final goal. Equality as a goal means that equalization could concern not only educational participation to and treatment in the system, but also educational achievements. Equal

³ On education the UN's Universal Declaration of Human Rights (1948) notes as follows: 'Article 26:

1. Everybody has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible to all on the basis of merit.
2. Education shall be directed to the full development of the human personality and to the strengthening of respect of human rights and fundamental freedom. It shall promote understanding, tolerance and friendship among all nations, racial or religious of the United Nations for the maintenance of peace.
3. Parents have a prior right to choose the kind of education that shall be given to their children.' (UN's Universal Declaration of Human Rights 1948)

educational achievements could then lead to greater socio-economic equalization and participation in the decision-making process of a society. (Husen 1972, 14-15)

Torsten Husen (for instance in 1972; 1975) has analyzed the changing conception of equality of educational opportunity. He has ended up distinguishing three major stages in the development of conception of educational equality. These are (1.) the conservative, (2.) the liberal, and what Husen calls (3.) a new conception of equality of educational opportunity. Later the third conception has been called also as a radical conception of educational equality⁴. These conceptions of educational equality are corresponding to three more or less distinct social philosophies. (Husen 1972, 27)

The conservative conception of equality of educational opportunity was prevalent in most industrial countries until World War I. The bases of the conception where in an idea that God had bestowed different amounts of capacity upon each human being, and the responsibility to make the best possible use of that capacity is on the individual. A hyper-conservative variation of this philosophy, claimed that God had given each individual the capacity that corresponded to the social class in which he/she was born. The conclusion of this statement was that 'talented' individual of higher class had to make optimal use of his/her capacity while a member of 'not that talent' lower class had to content with it what he/she had been given. In this conception all the educational system can do is to give everybody the education that he/she by birth deserve. A more liberal variation of the conservative conception of educational equality, conceived that it was also important to search for the scarce talent among the lower classes and masses for the benefit of the nation's economy. (Husen 1972, 28)

In the end of the 19th century the conservative philosophy of educational equality led to different selective school systems in a number of European countries. Rapid industrialization presupposes more white-collar workers and workers with more advanced skills, but the existing compulsory elementary school system couldn't meet these requirements. Secondary school system was mostly plant to prepare students for the university and so the curriculum of it was largely composed of classical languages and humanistic studies. In most industrialized European countries the policy implication was to create school system where children were selected after few years of elementary school to lower and upper secondary school which lead to higher education, and to middle school where students graduated at the age of 16 or 17. The middle schools were planed to cater for the needs of the new middle class of white-collar workers and small entrepreneurs. Also the way to higher education from the middle schools were obstruct. (Husen 1972, 28-29)

A number of policy implications based on the conservative philosophy can be noticed from the history of education in industrial countries. For instance in

⁴ For instance Lehtisalo and Raivola has named the third conception as a 'radical conception of educational equality' (radikaalinen käsitys tasa-arvosta) (Lehtisalo and Raivola 1992, 65-66)

Swedish selective educational system the transfer from the public elementary school to the academic secondary school, the gymnasium, was not possible until 1894. Another example of the conservative philosophy can be seen the guidelines of the Federal Republic of Germany's Commission on Education for the further development of school system in 1959. Without mandate from the Federal Government the Commission proposed a general school system of three different schools: 'Volksschule', 'Mittelschule' and 'Höhere Schule' to serve the needs of three different social classes. (Husen 1972, 29-30) As an example of the conservative philosophy of educational equality in contemporary Finland can be considered the selection system to enter some faculties of Finnish universities almost only by taking part in private preparatory courses. The entrance examinations are favoring students who have taken part in those courses. This can be regarded as approbation of the conservative conception of equality of education.

In the same way as the conservative philosophy, **the liberal conception of equality of educational opportunity** is based on the idea that each individual is born with a certain, relatively constant capacity of intelligence. Difference to conservative thoughts is that according to liberal philosophy the inborn intelligence of an individual does not correlate with his/her social class. So the educational system should be designed as to remove economic and geographic barriers that prevent able students of lower classes to take advantage of their inborn intelligence. Educational system would then promote social mobilization and lead able individuals from lower classes to due social positions. A complete application of the liberal conception of educational equality would mean that not only capable people from lower classes would be duly promoted, but that upper class youngsters with limited capacities should be given humble schooling and channeled into humble occupations as well. This way social status should be corresponding to individual's inborn aptitudes and the positions they are entitled. (Husen 1972, 31)

The liberal philosophy has been prevailing in educational thinking of industrial countries in the last fifty years. Number of school reforms has been carried out by extending education more advantage levels, making compulsory part of it less differentiated and more single-tracked. Special attention has been given also to children who are born poor or living far from schools. For instance in England the 1944 Educational Act made secondary school education universal and available not only to those who could afford it. (Husen 1972, 31-32) In the history of Finnish education the progress of liberalization of the educational system culminates in the 1970's reform of a free and compulsory universal nine-year basic education which combined three different parallel schools. Since then all citizens, without distinction of social origin, property or geographical location, have been able to take part in a single educational system and aspire, at least theoretically, from equally footing to higher education. In Finland, the government's financial aid for students can also be seen as a reflection of liberal conception of educational equality.

The political implication in industrial countries, based on liberal conception of equality of educational opportunity has not, however, lead to great social

mobilization. Already the surveys of late 1960's and early 1970's showed that extended provision of education and increased formal accessibility to free secondary and higher education for all children didn't considerably change the social structure of the enrolment. Student who took advantage of the increased opportunities came mostly from higher or middle-class families. Therefore the liberal reforms in education has had only very slight effect on the social structure of the societies in industrial countries. (Husen 1972, 33) In Finland Rinne (1995) and Kivinen have studied the nine-year basic education system's influence on social mobilization and equalization. According to their study, also in Finland the basic educational system has not increased lower social classes' enrolment in higher education, as it was thought during the formulation of the reform. In the Finnish educational system the enrolment to free higher education correlates clearly with the students parents educational and social background, so that if the father has higher education, the possibility of the offspring to take part in higher education is multiple than those youngsters whose father has only primary education. (Rinne 1995)

The logic of the liberal thinking of education, where admission and promotion in educational system should be guided by individual's aptitude and not by socio-economic background, is not valid. In educational system, the criteria of aptitude or capacity are traditionally grades and marks - scores in tests and results in examinations. All these criteria also correlate with social background so that higher status rating (upper, middle or lower-class) and higher economic state of the student means better scores and school achievements. The reason for this has been thought to be the environment in which the child has brought up: the interaction between mother and child, independence training, parental support, culture of learning, studying, and so on. (Husen 1972, 33-34) Thus from the utmost sociologist stand point, it could be claimed that testing at schools, is measuring more the social background of the children and the environmental factors where the children lives, than his/her intellectual capacity or aptitude. On the other hand it also can be claimed that individuals with a lot of intellectual capacity get better education, end up to upper-class and give their excellent genes to their children who also succeed at educational system just as their parents and grandparents have done for generations.

By considering the possibility to reach a liberal educational system, where admission and promotion in educational system is guided by individual's intellectual capacity and not by socio-economic background, leads and asks to specify the conception of aptitude and capacity.

The liberal conception of equality of educational opportunity has not worked as it was meant to. In those levels of education on which admission is generous and education is available to all free of charge, the socio-economic background does not play a great role. But as soon as a competitive selection takes place, in terms of admission, grade repeating and dropouts the correlation between background and indicators of school achievements increases considerable. (Husen 1972, 34)

The new or radical conception of equality of educational opportunity bases on thoughts risen from the failure of the liberal conception of equality of

educational opportunity. As the studies of early childhood have shown, the ability to succeed at school exists already in the very early years of childhood; it seems that formal education can not act as the prime equalizer. So far as the intelligence quotient (IQ) difference is concerned, the major portion of it has occurred a long time before the child has entered formal school. Thus, according to radical conception of equality of educational opportunity it is not enough to establish formal equality of access to education. To achieve greater equality in school achievements, society should adopt special means to compensate for the deficiencies of the environment in which the child grows up. (Husen 1972, 38)

In radical thinking the intelligence is seen as a description and a prognosis of those expectations set for an individual in some specific circumstances and culture. Thus intelligence can be specified only in an environment and a culture where it exists. The traditional ways of testing intelligence can not be regard as a valid method of predicting individual ability neither they can be regard as a competent usage of selection in educational system. Even that the methods may seem pretty valid, they still measure individual ability of some specific group of people, social class or culture in some externally standardized environment. (Lehtisalo 1992, 65-66) Also motivation or lack of it is not only individual factor - it is also a social product (Lehtisalo 1992, 68).

In the radical philosophy of educational equality, the conception of equality of opportunity does not mean identical opportunities. In radical thinking 'equality of opportunity means that every child should be given optimal opportunity to develop his personal asses as they are at the time educational treatment in public institutions begins' (Husen 1972, 39). So equality does not mean that all children should be treated exactly the same way. Actually equality of opportunity means that the educational system should provide equal opportunity for unequal treatment so far as socially relevant differences are concerned. This way the educational system should recognize the external barriers of the members of lower social classes and support them to excel those obstacles. (Husen 1972, 39)

A political implication, based on the radical conception of equality of educational opportunities, would mean for instance, straight support for such sub-cultures, families and environments existing in the society where children can not acquire intelligence. Also a selection to higher education after compulsory and free basic education, could be done in such a way that the student places for children coming from different social and cultural background would be in a same ratio as they occur in that age group of the population. Radical thinking of equality of educational opportunity would also demand to consider relevant working experience equal to formal education and to support continuing education as a method to equalize social inequality. (Lehtisalo 1992, 68-69)

The radical philosophy of educational equality criticizes the liberal thought's effort to support equally to all member of a society taking part in an educational system. Government's financial aid for students and the free selective higher education means an income transfer from future to present, but also an income distribution from those who don't educate themselves to those who do. Thus

those member of a society who finish or drop-out earlier from the educational system and do not benefit from the free higher education or the student's aid are actually paying the costs of those who continue in higher levels of education to reach better economical and social state in the society. For instance in Finland, where higher social classes consume obviously more the free educational services than lower social classes, the current educational system can be seen as an income transfer from poor to rich. To reach economical equality of education it would mean that as the government gives financial aid for those who take part in the higher education, it should also support equally those who have begin their working career earlier than others. (Lehtisalo 1992, 68) An alternative solution could be that higher education would be financed by the students, by those members of a society who will get the benefit of it, and the government would give financial aid only for those student who could not afford it.

The following table (table 1.1.) will show the principles of all three different conceptions of equality of educational opportunity: conservative, liberal and radical.

TABLE 1.1. THE PRINCIPLES OF CONSERVATIVE, LIBERAL AND RADICAL CONCEPTIONS OF EQUALITY OF EDUCATIONAL OPPORTUNITY

	Conservative	Liberal	Radical
Conception of intelligence:	- inborn, inheritable and unchangeable	- intelligence is a result of interaction between inheritable capacity and environment	- intelligence is not a valid measure to assess ability - intelligence is culture bound - intelligence is a result of interaction between inheritable capacity and environment
Basis of inequality:	- the biological difference in intelligence and ability of individuals	- cultural deprivation - unfair social opportunities	- culture of poverty - circle of poverty - unfair social opportunities
Political implication:	- chance for all, but only as far as the ability and resources of an individual demands	- education for all - compensatory activities - positive discrimination - common and so equal learning	- education for all - in higher education; quotas for students coming from different cultural and social background - recognizing working experience equal to formal certification of education - resources to continuing education
'Universal ideologies' related with:	Conservatism, authoritarianism, elitism,	classical liberalism, socialism,	'beyond left and right' -ideology

(Husen 1972)

2. THE WORLD BANK IN CONTEXT

2.1. Introduction

Texts such as policy statements include both explicit and implicit aspects. Thus the decoding of the text can be done in two ways - from evident text to context, or from context to evident text. (Palonen 1988, 63)

This and the next chapter (3. Zambia in Context) introduce a broad outline of the political and historical context in which the education policy statements of the World Bank and the governments of Zambia were written. The aim of the chapters is firstly to give the tools to interpret and decode the statements and secondly to give the reader the possibility to evaluate the interpretation of the actual research material introduced later in the chapter 5. In the study process the evident text of policy statements, the actual research material and the contextual material introduced in this and the next chapter have been studied coincidentally. Thus the meaning of the contextual material and the evident research material has arisen in interaction between them. The contextual material has influenced the interpretation of the evident research material and the evident research material has influenced the interpretation of the contextual material

The first part of the chapter introduces the World Bank's general aims, activities and principles. The second part introduces the World Bank's action in education sector. Main themes presented in this part are the actual lending on education and the projects carried out in this sector and earlier interpretations of the World Bank's policy objectives.

2.2. The World Bank - Aims, Activities and Principles

The World Bank⁵ is an intergovernmental organization founded in 1946 to promote economic development in emerging economies. The Bank was appertained to the Bretton Woods Arguments ratified by twenty-eight countries in 1944. Another financial organization, established in Bretton Woods is the International Monetary Fund (IMF), whose function was to furnish credits to countries with temporary balance-of-payments deficits and to stabilize short-term exchange rates. The World Bank and IMF operate in affiliation with the United Nations by being UN specialized agencies. The World Bank and IMF are tied up together in several ways. For instance the policy in both agencies is based on

⁵ The World Bank group consists of the International Bank for Reconstruction (IBRD, found in 1946), the International Development Association (IDA, found in 1960), the International Finance Corporation (IFC, found in 1956), the Multilateral Investment Guarantee Agency (MIGA, found in 1988) and the International Center for Settlement of Investment Disputes (ICSID, found in 1966). The lending operation to member governments is carried out by the IBRD and the IDA. The IFC funds only private-sector ventures, MIGA and ICSID provides investments with guarantees to developing countries, they advice governments on improving the climate for foreign investments and provide facilities for the conciliation and arbitration of disputes between governments and investors. In this study 'the World Bank' and 'the Bank' are used to refer to the IBRD and the IDA. Although the IBRD and the IDA are legally separated entities, the same administrative structure directs both (Bennett 1991, 295).

same principles, in many instance they operate together and to become a member of the World Bank a country has to be a member of the IMF first. The World Bank has 179 member countries of which 168 are members of both the International Bank of Reconstruction and Development (IBRD) and the International Development Association (IDA). Within the World Bank a country must be a member of the IBRD before it can join the IDA. (Yearbook of International Organizations 1993)

The World Bank is owned by its member states. Within the Bank the distribution of power and influence between the member states is based on the economic strengths of the member as reflected in their subscriptions to the capital of the World Bank (World Bank - IBRD Articles for Agreement 1989, Article II, Section 3 and Article V, Section 3). The same method is used in all World Bank organizations; IBRD, IDA and International Finance Corporation (IFC), and in the IMF. The member governments are the Bank's shareholders giving their guarantee for public and private investors investing on the Bank. Only a small portion of the World Bank's operations is financed by the taxpayers of the member countries, the Bank's capacity to lend to its members is contingent on its capacity to borrow from the international finance markets. The World Bank's high credit rating in the finance markets ensures low rates for the funds it borrows and so the Bank is able to lend to its member governments with fairly low rates. (World Bank - IBRD Articles for Agreement 1989)

The structure of the Bank includes a Board of Governors, Executive Directors, a President and other officers and staff. All the power is vested in the Board of Governors, which consists of one governor from each member government. Each governor serves five years, but may be reappointed by the government represented. The Board of Governors holds an annual meeting, but the Executive Directors may also call the Board of Governors to have an extra meeting. Most of the power of the Board of Governors has been delegated to the Executive Directors, except the matter of admitting or suspending members, increasing or decreasing the capital stock, making arrangements to cooperate with other international organizations, suspending the operation of the Bank and distributing the net income of the Bank. The Executive Directors are responsible for the conduct of the general operation. The group of Executive Directors consists of twelve members of whom five has to be appointed by each of the five members having the largest number of shares. The rest seven are elected by all the Governors other than those already having representation in the group of Executive Directors. The Executive Directors are appointed and elected every other year. The President of the Bank is selected by the Executive Directors. The President is a Chairman of the Executive Directors without a vote, except in a case of an equal division. The President may also participate in meetings of the Board of Governors without a vote. The Presidents actual occupation is to be the chief of operating staff and conducts the ordinary business of the Bank under the direction of the Executive Board. The President is also responsible for the organization, appointment and dismissal of officers and staff. (World Bank - IBRD Article of Agreement 1989, Article V, Section 1-5)

Loans for members are made by the Bank under six main rules. First, all loans must be made to member governments or must be guaranteed by governments. Second, rate of interest for loans must be consistent with the prevalent rate in the international money markets. Third, repayment must be made within ten to thirty-five years. Fourth, loans are allowed to be made only in circumstances in which other sources are not readily available. Fifth, loans must be made of the probability of repayment by considering the soundness of the project and responsibility of the government. Sixth, the Bank has to maintain sufficient surveillance of carrying out of the project to assure that it is well executed and managed. (Bennett 1991, 294 and World Bank - IBRD Article of Agreement 1989, Article III, Section 4)

Between the two main agencies of the World Bank Group, the IBRD and the IDA, there are some remarkable differences. IBRD borrows in world finance markets and lends to its members at rates not much higher than it pays to borrow. However the IBRD's conventional middle-term loans are tied up to world finance market rates and many of the poorest countries cannot bear the debt burden. In 1960 the IDA was created to provide for the finance needs of the poorest, least-developed countries. Countries with per capita GNP less than \$US835 (1995) are eligible for IDA loans, which are made for forty to fifty years at no interest with only administrative service charge of three-quarters of a percent. Unlike the IBRD, the IDA does not borrow on international finance markets. The IDA gets funds from its donor member states, from repayments on earlier IDA credits and from the IBRD transfers. Richer IDA members, the donor states, are asked every three years to replenish IDA funds. (World Bank 1996 in <http://www.worldbank.org>)

Even though the terms of loans differ between the IBRD and the IDA they are not organizationally discrete agencies with own administrations or policies. The premises and loan procedures of the IDA loans are the same with the IBRD, except for the repayment period and interest rate. As in the IBRD, lending in the IDA occurs only for economically sound projects, where repayment is expected. Also when the GNP in the member countries exceeds the IDA threshold it may no longer borrow interest-free loans, but it can continue borrowing from the IBRD at market-related rates. (World Bank 1996 in <http://www.worldbank.org>)

From one point of view the IDA can be interpreted as to ensure future clients for the IBRD and so keep the World Bank in business. One problem for every successful development bank is that in time it will make itself unnecessary - and run out of business. In the post-war years the World Bank had been extremely successful in Western Europe, Australia and Japan and so in late 1950's it was rapidly running-out of clients compared with resources available in financial markets. At the same time a number of African countries became independent and joined the Bank. As a result the Bank started to pay more attention to least-developed countries and established the IDA. (Jones 1992, 24-28 and 90)

In the fiscal year 1994 IBRD lent \$US14.2 billion for 124 projects and in year 1995 total lending was \$US 16.852 billion for 134 projects. In 1994 IDA lent \$US5.5 billion to least-developed member countries to help development

projects. In the fiscal year 1995 IDA approved \$US 5.7 billion in credits. (World Bank - Annual Report 1995)

2.3. The World Bank and Education

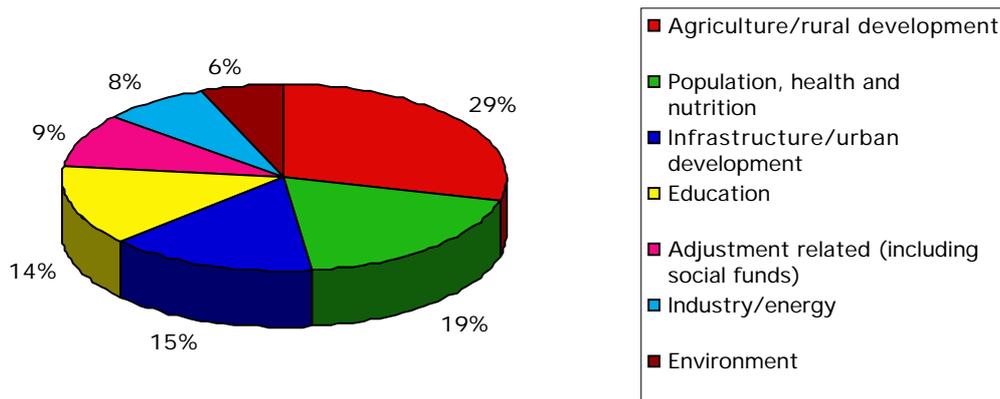
Three broad ways have existed for interpreting Bank policies in education. One is to discover what the Bank is actually prepared to lend for, and on what terms, by studying loan negotiation and approval process. Another way to analyze the Bank policies is to study the formal policy statements. The rhetoric and argumentation of education and development - the way the Bank is trying to attempt to influence prevailing political climate and public opinion - can be analyzed from the statements. The statements are also trying to influence on national policies in those countries lending from the World Bank. Third way for exploring the Bank policies in education has been emerging since the Bank's lending has changed in the last decade from project based lending to program lending. The structural adjustment programs, financed by the Bank, are made to identify how governments should relate to the economic environment and define their role in the provision of services. Thus large sectors, such as education and health have got a lot of attention in structural adjustment programs and can be studied as a one form of the Bank's education policy. (Jones 1992, 220-221 and Jones 1996, 2-3)

In this study the analyses are mostly focusing on quantitative data available of the Bank's action in the field of education. The analysis starts by defining the World Bank's action in education sector in relation to other Bank's activities and continues by describing the action by projects and loans admit to education sector.

The World Bank supports education by providing financial resources, technical assistance and policy advice (Verspoor 1990). Since the first education loan was made in 1963 the Bank has approved loans totally nearly \$US 20 billion through more than 500 projects in more than 100 countries. The Bank has continuously expanded its financing of education projects and today it is the largest single source of external finance for education in developing countries. From total external support, including all bilateral and multilateral finance, the Bank's share is about a quarter. In recent years lending commitments have been currently around \$US 2 billion in each fiscal year. (World Bank - Annual Report 1995)

In 1980's education's share of all World Bank lending varied from about 2.5 percent to 6.5 percent. In 1990 The World Bank took part in the World Conference on Education for All in Jomtien, Thailand, as a co-supporter with UNESCO, UNDP and UNICEF. At the same time the World Bank's share of education in total lending almost doubled so that in the early 1990's it has vary between 7% to 10%. In fiscal year 1995 education was the fourth largest category in the World Bank's lending with share of 14%. World Bank's lending by category in fiscal year 1995 is shown in following figure. (World Bank - Annual Report 1995)

FIGURE 2.1. WORLD BANK LENDING BY CATEGORY IN FY 1995 (IBRD AND IDA)



(Source: World Bank 1996 in <http://www.worldbank.org>)

In its early years of lending on education the Bank was mostly lending on projects dealing with secondary and higher education. In the period of 1963-68 share of secondary education projects of all educational lending was 84 percent, higher education got 12 percent and non-formal education got 4 percent. Main areas in secondary education were to expand general, vocational, technical and commercial education and training in developing countries in order to provide more productive workers. The projects approved by the Bank in 1960's were concentrating on construction (69%), equipment (28%) and technical assistance (3%) of educational institutions, such as general secondary schools, technical and commercial schools, agricultural schools and teacher training colleges. (Jones 1996, 3)

In 1970's the World Bank's lending on education to primary education projects' share started to increase slowly. In early 1970's it was still only 5 percent, but already in the period of 1975-78 it had increased to 14 percent. At the same time the non-formal education's share of the Bank's total lending on education increased from 5 percent to 17 percent, as well. The correspondingly share of secondary education projects decreased from 50 percent to 43 percent and projects of higher education from 40 percent to 26 percent. The projects approved by the Bank in late 1970's were still mostly concentrating on construction of institutions. (Jones 1996, 7)

In 1980's a share and number of primary education projects increased effectively. In the end of the century the number and total amount used to primary education projects by the Bank increased so that, in the beginning of 1990's primary education was the Bank's main category in its support on education. Also the type of educational projects financed by the Bank changed during the 1980's. As the projects approved by the World Bank had been mostly construction of schools and educational institutions, in 1980's the Bank started to take more charge on equipment, technical assistance and other expenditures, such as management and administration. The distribution of the World Bank's educational

financing by broad categories in periods of 1963-76, 1977-86 and 1987-90 are shown in the following table.

TABLE 2.1. DISTRIBUTION OF PROJECT INVESTMENTS BY BROAD CATEGORY⁶
(PERCENTAGE), TOTAL PROJECT COSTS (\$US M) AND THE WORLD BANK'S SHARE OF
TOTAL PROJECT COSTS (\$US M & PERCENTAGE) FY 1963-90

	1963-76	1977-86	1987-90
General education	42%	53%	60%
Vocational education	52%	44%	36%
Non-allocated	6%	3%	4%
Total	100%	100%	100%
Total project costs	2 266	11 759	5 324
World Bank share of total project costs	1 580 (70%)	5 869 (50%)	3 755 (71%)

(Source: Jones 1992, 182)

In the available statistics (Jones 1992, 182) the distribution to broad categories and sub-sectors of education are as following:

- The broad category of (a) *general education* includes sub-sectors of (1.) *primary*, (2.) *secondary*, (3.) *non-formal (literacy)*, (4.) *post-secondary* and (5.) *teacher education*.
- The broad category of (b) *vocational education and training* includes sub-sectors of (1.) *secondary*, (2.) *post-secondary*, (3.) *non-formal* and (4.) *teacher education*.

The new figures calculate by reformulating the World Bank's sub-categories of the broad categories to *first level*, *second level* and *third level* education will give better picture of the Bank's distribution of finance in last thirdly years. The classification by level of education is used for instance in UNESCO (1993) statistics to describe distribution of expenditure on education in different countries. The reforming of categories and sub-sectors of education was carried out as follow:

- *First level* includes sub-sectors of (1.) *primary* and (2.) *non-formal (literacy)* from the broad category of (a) *general education*.
- *Second level* includes sub-sector of (1.) *secondary* from broad category of (a) *general education* and sub-sectors of (2.) *secondary* from the broad category of (b) *vocational education and training*.
- *Third level* includes sub-sectors of (1.) *post-secondary* and (2.) *teacher education* from broad category of (a) *general education* and sub-sectors of (3.) *post-secondary*, (4.) *non-formal* and (5.) *teacher education* from the broad category of (b) *vocational education and training*.

⁶ Percentage shares of categories have been calculated from the total project costs.

With the new categories of education the World Bank's distribution of educational financing the period of 1963-90 appear as follow:

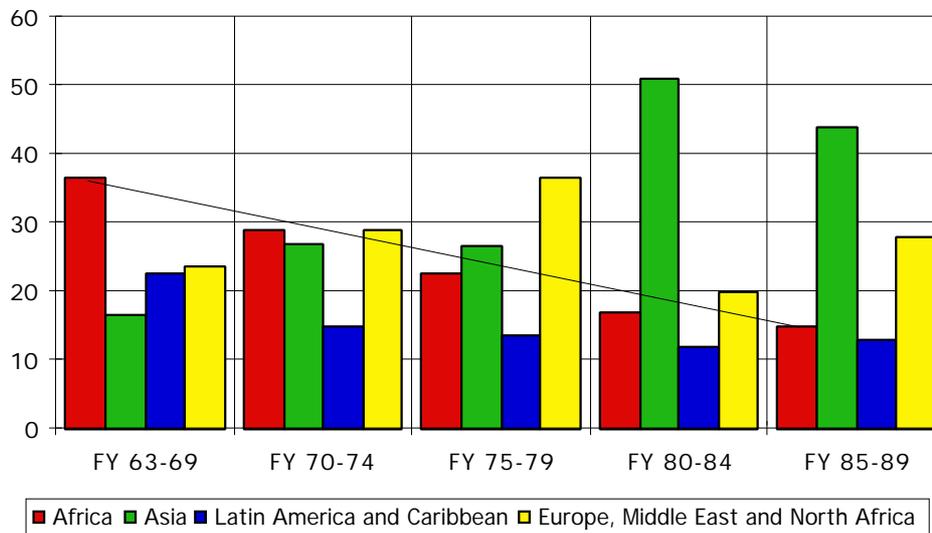
TABLE 2.2. DISTRIBUTION OF PROJECT INVESTMENTS BY LEVEL⁷ OF EDUCATION IN THE WORLD BANK'S FY 1963-90 (PERCENTAGE)

	1963-76	1977-86	1987-90
1st level	7%	22%	25%
2nd level	43%	16%	11%
3rd level	43%	59%	55%
Non-allocated	7%	3%	9%
Total	100%	100%	100%

(Source: Jones 1992, 182)

In its lending on education by region in period of 1963-1989 the Bank has heavily concentrated on East- Asia and Africa. In early years of lending on education in 1960's Africa's share of total educational financing of the Bank was about 40 percent. After that the share started to decrease and was only 15 percent in the period of 1985-1989. When Africa's share decreased in 1970's and 1980's the share of Asia increased such a way that in the period of 1980-1984 its share was over 50 percent of the total. Latin America and the Caribbean share has been raising from 13 to 23 percent in the period of 1963-1989, when Europe, Middle East and North Africa have been decreasing from 24 to 28 percent. The following figure 3.2. gives an overview to the regional distribution of the World Bank's lending on education in 1963-89.

FIGURE 2.2. WORLD BANK'S EDUCATIONAL FINANCING ON EDUCATION BY REGION IN 1963-89 (PERCENTAGE)



(Source: Jones 1992, 181)

⁷ Percentage shares of levels have been calculated from the total project costs.

In the fiscal year's 1991-1994⁸ the World Bank supported 109 educational projects in 59 countries. Through the IBRD the World Bank made 53 loans and through the IDA 56 loans. The amount of IBRD loans varied between \$US5,4 million and \$US412 million when the amount of the IDA loans were from \$US6,7 million to \$US307 million. Average amount of IBRD loans was \$US96 million and median of granted loans was \$US69,5 million. In IDA the average loan was \$US55 million and median of loans was \$US34,5 million. Total amounts of IBRD loans and IDA loans for education in fiscal years 1991-1994 is shown in following table. (World Bank - Annual Reports 1991, 1992, 1993, 1994)

TABLE 2.3. TOTAL AMOUNT (\$US M) OF IBRD AND IDA LOANS FOR EDUCATION IN FY 1991-1994

	1991	1992	1993	1994
IBRD	1515,5	1299,6	968	1409,9
IDA	736,2	584,1	1038,2	658,1
Total	2251,7	1883,7	2006,2	2068

(Source: World Bank - Annual Reports 1991, 1992, 1993, and 1994)

In the fiscal years 1991-1994 in its educational finance the World Bank has more clearly concentrated on primary and vocational education. The Bank has also supported more the education sector in whole and human resource development in general in the 1990's than in earlier decades. The projects descriptions included in the Annual Reports of the Bank in 1990's do not anymore define the distribution by category or level of education as they do in earlier Annual Reports. This can be seen as a result of expanding structural adjustment lending where the Bank supports more adjustment policies included education sector as well, but do not any more support that much specified development projects. Thus a number of World Bank educational finance in 1991-1994 was 'provided to supplement education-sector adjustment credit' and 'to finance the Human Development Program'. (World Bank - Annual Reports 1991, 1992, 1993, 1994)

The survey of 1991-1994 education projects indicates clearly that the largest categories of support were primary education and vocational education. In this period the Bank supported 33 projects targeting purely on the primary education in total sum of \$US 3 222,8 million, which was almost 40% of all support on education. In projects supporting primary education, the most used catchwords to describe the main aims of the projects were to improve 'quality', 'efficiency' and 'access'. Main problems introduced within the project description were 'low enrolment rates', 'high dropout rates', 'girl's low participation' in primary education. The most common means introduced to solve the problems and to achieve the aims were to improve 'teacher education', 'educational administration and management', 'school buildings' and 'textbooks'. In some projects special attention was given to 'low income children' and 'rural and poorest schools'. From

⁸ The Annual Reports of the World Bank (1991, 1992, 1993, 1994) introduces all education projects, which the IBRD and IDA has supported during the year in question. The introduction includes a sum of total project costs and the sum of the World Bank's lending on it. From these figures I have calculate the total amounts, averages and medians and specify the distribution of projects investments.

the projects of primary education 17 were admitted by IDA and so located in less-developed countries. Total amount of IDA loans on primary education in 1991-1994 were \$US 881,6 million. IBRD approved loans for 16 projects and the total amount of loans was \$US 2341,2 million. (World Bank - Annual Reports 1991, 1992, 1993, 1994)

In the period of 1991-1994 the Bank supported projects directing vocational and third level, included scientific research, in total sum of US\$ 2 691,5 million, which was about 33% of all support on education. In a number of projects targeting towards vocational and third level education, the main purpose was to improve scientific and technical research in university level. Another notable type of projects in a sub-sector of vocational education were those designed to improve employment opportunities by upgrading training responsiveness to labor-market needs. From the 35 projects of vocational and third level education 12 of them were supported by IDA and 23 of them by IBRD. Total amount of IDA loans for vocational and third level projects were \$US 756,5 when IBRD's total amount of loans for similar projects were \$US 1 935,5 million.

In the education projects approved in the period of 1991-1994 there were also three projects focusing specially on early-childhood development and pre-primary education. For instance in the fiscal year 1993 the World Bank supported a project in Bolivia where the target was to benefit children between six months and six years of age. The project outline was to improve children's readiness to succeed in school by advancing their physical, emotional, social and cognitive development. Another target, related to benefit children too, was to improve women's education and employment opportunities. (World Bank - Annual Reports 1991, 1992, 1993, 1994)

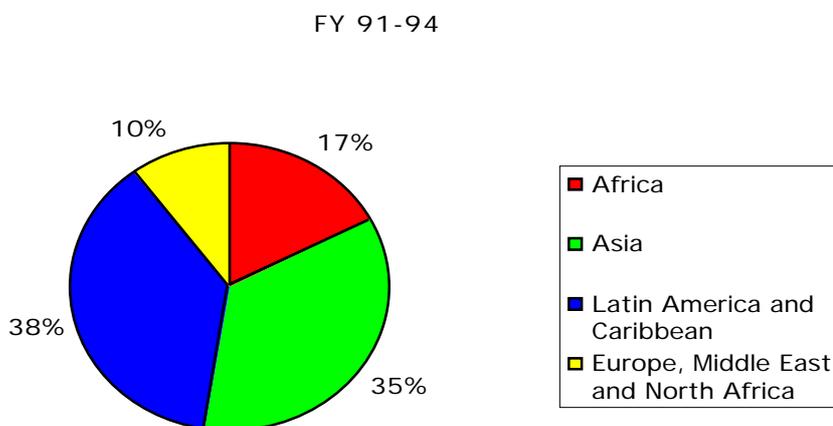
Even that the figures are extremely open to various interpretations from the above tables it can be noticed that the World Bank's increased share of finance on general education and first level education has been carried out by decreasing second level's share of total finance (see table 3.1 and 3.2). Third level's share has stayed all thirdly years in remarkable high level. However it is reasonable to notice that one large category inside third level education is teacher education, which benefits strongly first and second level education and could be classified into them.

In early 1990's Latin America and Caribbean has got the biggest part of the World Bank's financing on education. Latin America and The Caribbean's share of total lending on education have been 38%. Most of the financing on education in the region of Latin America and Caribbean has been directed to few extensive projects in Brazil and Mexico. In the period of 1991-1994 the World Bank granted loans to 6 educational projects in Brazil for total amount of \$US 1 059,6 million. During the same period Mexico received 5 loans on education projects for a total amount of \$US 988 million. Together the loans for Brazil and Mexico covered more than two third of all financing on education in region of Latin America and Caribbean. Compared the previous figures from the period of 1963 to 1989 to the figures of early 1990's the region of Latin America and the Caribbean has remarkable increased its share of the World Bank's total financing on education

in last years (see; figure 3.2. and 3.3.). In the region of Asia, which received 35 percent of all World Bank financing on education in 1991-1994, the main borrower countries were India (\$US 472,1 million), Pakistan (\$US 421 million), Republic of Korea (\$US 420 million), Indonesia (\$US 379,7 million) and China (\$US 361,2 million). Together the five main borrowers covered more that 70% of all the World Bank financing on education in region of Asia. In Europe, Middle East and North Africa the World Bank approved only 14 education projects and the share of total lending on education was 10%. (World Bank - Annual Reports 1991, 1992, 1993, 1994)

In late 1960's and early 1970's Africa was the World Bank's main object in its financing on education. In 1980's Africa's share of the Bank's total lending on education decreased so that in a period of 1985-89 it was only 15 percent. In early 1990's Africa's share has slowly increased so that in a period of 1991-1994 it reached 17 percent of the Bank's total financing on education. From educational projects in Africa the World Bank approved 35 during the fiscal years of 1991-1994. The greatest educational projects financed by the World Bank in Africa during the period of 1991-1994 were located in Cote D'Ivoire, Kenya, Ghana and Nigeria. In Cote D'Ivoire the Bank approved five projects, which together got a total finance of \$US 333,7 million. In Kenya the Bank's total financing on five educational projects were \$US 271,1 million. The Bank supported also four projects in Ghana with total amount of \$US 142,2 million. In Nigeria the Bank got two projects, which were supported by total amount of \$US 128 million. These 16 projects located in four countries got together more than 60 percent of Bank's all educational financing in Africa. (World Bank - Annual Reports, 1991, 1992, 1993, 1994)

FIGURE 2.3. WORLD BANK'S FINANCING ON EDUCATION BY REGION IN 1991-94 (PERCENTAGE)



(Source: World Bank Annual Reports 1991, 1992, 1993, 1994)

During the period of 1991-1994 The World Bank approved only on Zambian educational project in the fiscal year of 1993. According to the World Bank's Annual Report 'about 1.5 million primary school pupils and 5000 education managers are to benefit from an education rehabilitation project that seeks to arrest further decline in education quality, increase access to education and improve the learning environment, and strengthen professional and administrative support to teachers and to schools' (World Bank - Annual Report 1993, 152). The total cost of the project was \$US 42.8 million which of main part was plant to cover by IDA loan of \$US 32 million and by co-financing of the Netherlands, FINNIDA, the OAD, SIDA, and UNICEF. (World Bank - Annual Reports 1991, 1992, 1993, 1994)

What kind of stress should be given to figures when investigating the World Banks policy on education? In the interpretation of the loan statistics of the World Bank some specific affairs are worthy of consideration. Firstly, the Bank is a financial institution and can lend only if someone is willing to borrow. If no one is willing to borrow for purposes the Bank is willing to lend, the Bank will run out of business. This way the real lending-policy formulation happens and should be interpreted as an interaction between the customers and the Bank. The lending policy introduced in the policy statements may be dictated by the ruling member governments of the Bank, but the actual policy will be formulated in the interaction between the customer governments and the Bank in the setting were the actual projects will (or will not) come true. Secondly, the figures introduced above don't tell what has really happened in the projects. They may tell for what purpose the governments has been borrowing from the Bank, but they do not tell how the money has been used. Even the specific loan convenience may not tell much about the reality - the real policy. Borrower government, after borrower government simply ignore them once signed. (Jones 1992, 220-221 and 1996, 2)

3. ZAMBIA IN CONTEXT

3.1. Introduction

This chapter introduces board outlines of the political and economical context, and the state of education where the political statements of the Governments of Zambia were written. It also introduces previous studies of education in Zambia, which is also part of the context - a part of the debate and discussion related to policy statements. It is important to notice that the context as it is introduced in this chapter is just a one interpretation of Zambian society and education, based on available textual material. The main purpose of the chapter is more to introduce the context where this study and the interpretation of the actual research material was made, than to introduce actual historical and current situation of society and education in Zambia. This way the chapter will give the reader a possibility to evaluate the essential study results - the interpretation and decoding of the actual textual research material, introduced later in chapter 5.

First the chapter describes Zambia's political, economic and social history from the years of struggle for independence to middle 1990's economical and political crises. Second it concentrates on the educational sector in Zambia, which is considered from three point of views seen relevant for the purpose of this study: quantitative development in supplement of education since independence, finance of education and equality of education.

3.2. Political, Economic and Social Context

The modern history of Zambia is tightly bound to the history of mining in southern Africa. In the end of the 19th century the British South Africa Company (BSAC) was given a royal charter to explore, develop and administer the area. The first mine was established in 1908. In mid-1920s the British colonial office took over the BSAC's administration and the area was called Northern Rhodesia. From 1953 to 1963 Northern Rhodesia formed part of the Federation of Rhodesia and Nyasaland. In the early 1950s a small group of educated Africans started to arrange a social movement against the British rule, racial discrimination and denial of basic rights. In the end of the decade The Zambian African National Congress (ZANC) was established and the leadership was given to schoolteacher, Kenneth Kaunda. ZANC later became the United National Independence Party (UNIP). In the early 1960, under continued pressure, the European colonial authorities finally understood that the system could not succeed anymore. After the elections in 1962 the first African majority government was formed by the new prime minister Dr. Kaunda's UNIP and Harry Nkumbula's African National Congress (ANC). After the collapse of the federation in 1963 an election was held for the new 75-member National Assembly. UNIP got 55 seats, ANC 10 seats and the rest of the seats (10) were reserved for Europeans. (EIU 1995, 3-4)

On October 24, 1964, Zambia became independent and Dr Kaunda became its first president. In 1972, with support of president Kaunda and UNIP Zambia

moved to one-party system. In early 1980's Dr Kaunda's leadership came under increasing criticism and led finally to a wave of strikes in 1981. The Zambia Congress of Trade Unions (ZCTU) and its leader Frederick Chiluba became the main alternative power base to UNIP. In the mid-1980's the government faced more and more problems - mismanagement of economy, high-level of corruption and especially the IMF's recovery programs. In 1986, the government gave an announcement of the removal of maize meal subsidies. The announcement led to riots in the Cooperbelt mining area and 15 people died. The government response was to restore the subsidy, nationalize the milling companies and blame IMF of its recovery programs. In 1987 the government of Zambia was breaking with the IMF and introducing it's own self-help economic recovery plan. The break with the IMF faces strong critics from international community and slowdown financial flows but was domestically popular. However the self-help plan failed and the UNIP's economic management was strongly criticized by parliament and the trade unions. In the 1988 election, the revelation of a couple of plots just before voting meant that UNIP government got through the polls relatively undamaged. After the election, the government introduced its new economic policy. in 1988 the currency, Kwacha was devalued first time. In 1989 the maize subsidies were reduced, price controls were removed, interest rates were raised and the Kwacha was devalued second time. The new economic policy started to slowly balance the national economy. However in the 1990, as in the 1986, the announcement of increases in the prize of maize led into riots. This time the riots started in Lusaka, where demonstrations were organized by students. The riots were quickly spread to other urban areas and at least 23 people were killed. Even that the government and president Kaunda called the disturbance as food riots, it was clear that they were fundamentally political. The government's reaction was to approve open discussion of a move to multiparty democracy. Pretty soon the Movement of Multiparty Democracy (MMD) was founded by a number of groups opponent of one-party state, including businessmen, students, church leaders, trade unionists and politicians. Under continued pressure Dr Kaunda decided support the move to multiparty elections and on December 4th, 1990 parliament passed the Constitution of Zambia Amendment Bill and moved to multiparty democracy. In January 1991 the MMD was formally registered as a party. (EIU 1995, 4-6)

The National Assembly approved new constitution in 1991. It was written by a commission appointed by Mr. Kaunda. The commission included also members of MMD, but more than three-quarters of the commission were members of UNIP. The commission traveled around the country to receive people's written and oral submissions. The new constitution provided for 150-seat National Assembly and an executive president, both elected every five years by universal suffrage. For the first time the tenure of president was limited to a maximum of two five-year terms. (EIU 1995, 7)

In the 1991 election the MMD won 125 seats in the National Assembly and Frederick Chiluba won 76 percent presidential vote and was sworn in as the Zambia's second president. The handover of power was smooth and during the first months the new government was able to work quite effectively. However

already in 1993, press and some cabinet ministers claimed that the government was corrupt. The matters were made even worse by the president's surprise dismissal of the ministers of agriculture, finance, mines and education, plus four cabinet ministers regarded as the least corrupt. Other ministers were alleged to be involved in drug traffic. It was also claimed that the reins of power were held by three influential businessmen - ministers, who have been important financiers of MMD. (EIU 1995, 6)

The MMD had promised to rewrite the constitution given in 1991. The work of new commission started in 1994 and the draft version was given to the president in 1995, with a recommendation to give it legitimacy it should be approved by national referendum. Some issues of the new constitution have been extremely difficult to solve, especially the question of clauses to be qualified for president. (EIU 1995, 7)

In 1996 election, the MMD and the UNIP, ran once again by Mr. Kaunda were the leading parties. The National Party (NP), found by nine MMD members of the parliament and four cabinet ministers who resigned from the ruling party in 1993, was the third important party in 1996 election. However, so far NP has support only in three out of nine provinces and very little in urban areas. (EIU 1995, 7-8)

In the early years of independence Zambia had a fairly health economy compared with other post-colonial sub-Saharan African states. The economy grew fast and the cooper exports ensured foreign exchange earnings. Development of the infrastructure and public services were based on one export - cooper. In the early-1970's oil crisis and a fall of world cooper price in 1975 had a dramatic effect on Zambia's national economy. In consequence of this the foreign exchange and national output decreased rapidly and the foreign dept increased. In 1983 the government, with IMF backing, engage to a number of adjustments to restructure the economy. Main objective of the restructure was to increase domestic food product by developing agricultural sector and thus replace the gap in GNP left by decreased mining sector. In 1987 the government of Zambia dissociated itself from the IMF adjustment policies. Even that many of the measures undertaken were ended, the restructuring program continued unchanged. Already in the beginning of 1991 the UNIP government took some steps back to IMF-style policies, but the relations with donors were not normalized until the new MMD government got into power in the end of the year. (EIU 1995, 12-13)

The 1992 budget and the Policy Framework Paper 1992-1994 (PFP) emphasized strongly new measures to bring down inflation and to liberalize economy by privatization. Also plans to carry out tax reforms, cuts in civil service and social services were introduced. The PFP was introduced as part of a Right Accumulation Programme (RAP). The RAP's aim was to allow the government to clear its arrears with the IMF. Even that all price controls, including maize and flue, had been withdraw and about 10 000 civil servants had been discharged, only little progress had been made on privatization and the inflation is still out of control. In 1995 it was noticed that government finance was not improving as quickly as hoped and this led to the suspension of negotiations with IMF in March

1995 on a successor to the RAP. It seems that the government is going to face shortly a number of new dire economic difficulties - several years of poor rain is affecting on general living standards, the privatization program is stalled over but the state-owned cooper mining company, Zambia Consolidated Cooper Mines (ZCCM) should be sold off and same time the cooper reserves are declining rapidly. (EIU 1995, 13)

According to the figures, the economy of Zambia has been weakening almost year after year since 1970's. In the period of 1975-1993, national economy grew about 19 percent, when the population increased nearly 85 percent. Thus per head the size of economy has decreased dramatically. Only years of real growth during the period were in 1988 and 1993, when the country recovered from drought and the yield was exceptional good. In the World Bank's classification Zambia is qualified as a 'low income' country. In the early 1980's Zambia was still in the group of 'lower middle income' countries. (EIU 1995, 13-14)

Zambia is one of the most urbanized countries in the sub-Saharan Africa. In the early years of independence the employment opportunities and relatively high wages led to strong rural-urban migration. In 1969 from the total population urban was 29 percent and, in 1980 43 percent and in 1990 about 50 percent. Recent years effective policy to increase the agricultural production's share of the GNP has fell the share of urban population back to about 40 percent. Another remarkable feature of Zambian society is the heterogeneous of population by ethnic background and languages. In indigenous population there have been identified 73 different ethnic groups, about 80 different Bantu languages, which of seven are recognized as official vernaculars. However, English is the official language of government and business and although ethnical diversity has proved less political problem in Zambia than in many other sub-Saharan African countries. (EIU 1995, 9-10)

3.3. Education in Zambia

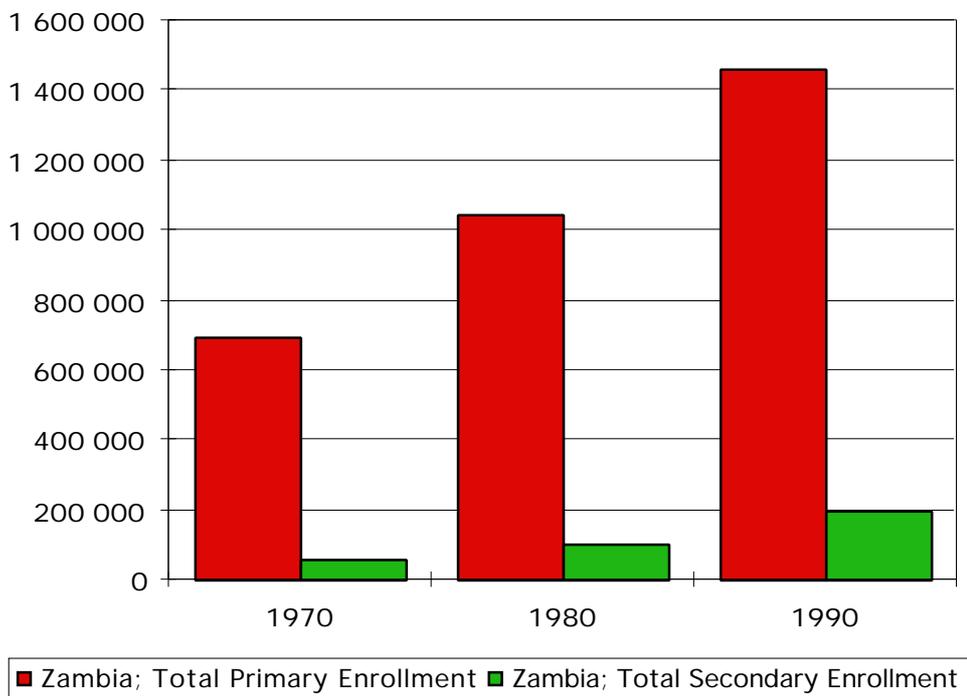
Before independence the schools were mostly established and run by missionaries, local communities and some enterprises. The system was mostly serving the colonial rulers and white traders who need African to work in their establishments. At that time the schools for Africans and Europeans and for mixed races including Asians were all separate. The racially segregated schools were an official British policy and executed elsewhere in British dependencies in Africa, too. (Achola 1990, 1)

In 1963 the Economic Survey Mission, sponsored by United Nations, The Economic Commission of Africa and the Food and Agricultural Organization notice that in Northern Rhodesia there were only 4420 Africans who had past the two-year secondary school and only 961 with full Cambridge School Certification. When president Kenneth Kaunda inaugurated the University of Zambia in 1966, he announced that at the time of independence on 1964 Zambia had only 100 university graduates, educated outside the country, and only 1500 with full Cambridge School Certification, and no more than 6000 indigenous citizens with at most two years of secondary education. Also by compared with other Sub-

Saharan countries the education before independence were totally neglect. For instance in early 1960's Uganda had six times as many secondary School Certificate holders as Zambia. (Achola 1990, 2)

After independence the development in primary education, in terms of enrolment and new schools, was extremely rapid. Between 1966 and 1970 total enrolments increased by about 220 000 and already in 1970 the Grade I enrolment was almost identical to the estimated seven year population (Zambia - NDP 1971, 24). Already in 1970's the gross enrolment rate in primary level achieved about 90 percent, which is even today unusual high for developing countries like Zambia (SPESSA 1995). With fast on going population growth also the size of educational system has increased year after year. The figure 4.1. describes the increase of total enrolment in primary and secondary levels in last three decades.

FIGURE 3.1. TOTAL ENROLMENT IN PRIMARY AND SECONDARY EDUCATION IN ZAMBIA IN 1964-1990



(Source: SPESSA 1995)

the population of Zambia has been estimated to be in 1995 between 8 and 9 million and the annual population growth 2,7 (CIA 1996). About 50 percent of the 1995 population was estimated to be 0-14 years old (CIA 1996). In latest statistics available in 1994 the total enrolment in about 3700 primary schools was about 1 500 000. In about 590 Government and Grant Aided secondary schools the total enrolment was about 200 000. At the two universities there was about 4700 students and in the 14 Teacher Training Colleges about 4600. The Ministry of Education is also administering 13 institutions providing training in academic, secretarial and technical fields. (Zambia 1995)

In the early years of independence the educational structure was based on 8 years of primary education and 5+2 years of secondary education. At the same time as the University of Zambia was established in 1966 the structure was reorganized to contain 7 years of primary education and 5 years of secondary education, though in secondary schools there was a cut off examination after Form III. The idea of a 9 year, compulsory and free universal basic education has appeared since 1970's in the policy statements of the UNIP and has been introduced as a long term goal by both governments. (Achola 1990, 6-7: Zambia 1977, 7: Zambia 1992, 74)

According to the 1995 draft version of the National Policy of Education (Zambia 1995) the education system is based on 7 - 5 - 4 structure. The primary school education is lasting seven years, the secondary school five years and tertiary and training four years. There is also some primary schools offering nine years' basic education. The secondary education is divided into two years of junior secondary and three years of senior secondary education. The tertiary education can last from two to seven years. (Zambia 1995)

In the primary level the net enrolment rate in 1995 school statistics was 85 percent for male and 80 percent for female. About 15 percent of the pupils enrolled at primary schools were not of primary school age (7-13). The completion rate in primary level is about 80 percent for boys and about 71 percent for girls. Also there are still many children who are not able to enroll in primary schools at all - in 1994 statistics, made by the Ministry of Education, about 15 percent if the primary school age children were not enrolled in school. (Zambia 1995) The statistics by UNESCO and the World Bank are about the same (SPESSA 1995).

Since mid-1980 local communities have reconstruct primary schools into 'basic schools' by adding grade 8 and 9 classes to existing primary schools. In many places parents and local authorities have made the reform without giving much stress on additional infrastructure or employing qualified teachers for the upper grades. This kind of basic schools have been established all over the country with out adequate planning. In 1994 there were about 400 basic schools giving 9 year basic education. The principal reason to further the basic schools has been to let children grow a little older before performing a selection examination. It has been claimed that the grade 9 school leaver, in age of 15 will be in better position to get themselves into upper levels of education and in labor markets as compared with the 13 year-old grade 7 school leavers. (Zambia 1995)

In 1994, from 7 primary school leavers 32 percent continued to the secondary schools. From the total enrolment 62 percent were boys and 38 percent were girls. About 30 percent of secondary school pupils were enrolled in boarding schools. The lack of school places in secondary level has been seen as a problem countrywide by parents and local school authorities. Thus the willingness to established new 9 year basic school has been interpret by the Ministry of Education to be caused by the lack of secondary school places. (Zambia 1995)

After completed grade 12, pupils can continue studies in tertiary level. In Zambia there are two universities, the University of Zambia (UNZA) and the Cooperbelt University (CBU). There is also 13 colleges administered by the Ministry of Education providing training in academic, secretarial and technical field. Also a number of private institutions are giving training for grade 12 leavers. (Zambia 1995) In the UNESCO's statistics of the 1990 the share between different field of study in tertiary level in Zambia were as follow:

TABLE 3.1. PERCENTAGE OF STUDENTS AND (GRADUATES) BY FIELD OF STUDY IN ZAMBIA IN 1990

Education	Humanities	Law and social sciences	Natural sciences, engin. & agric.	Medical sciences
44 (56)	9 (4)	14 (14)	25 (18)	4 (4)

(Source: UNESCO 1993)

The Ministry of Education trains teachers to primary and secondary levels in 14 Teacher Training Colleges. Teachers are also trained in three institutions administered by Ministry of Health, Ministry of Agriculture and Ministry of Science Technology and Vocational Training. Both universities are also training some teachers up to degree level. (Zambia 1995)

Studies of education in Zambia can be divided into two main category; those made by Zambian authors and those made by donors supporting the education in Zambia. IFrom the donor's, studies has been made by ODA, UNESCO, FINNIDA, The British Council, CODE, DANIDA, SIDA and the World Bank. The studies in 1990's has been focusing on a number of different areas and sub-sectors of education, such as the state of English in schools, school-book production, preparing of educational statistics and in general on the development of primary education. (UNESCO 1994b)

From those studies available some main themes of educational research in different periods can be identified. The trends of educational research are also closely related on general development of educational system and different eras of education policy. The first remarkable trend was after the National Educational Reform debate arranged in 1976-1977. The debate, the policy formulation process and the final result of the debate, the 'Education Reform' statement, has been analyzed and evaluated in a number of studies made in 1980's (O'Brien 1982, Alexander 1983, Draisma 1987). In late-1980's and early 1990's trend in educational research has been the analysis of education sector during the years of declining economy. Also the Education for All conference in 1991 brought a number of studies on education in Zambia, both analyses before the conference (Kelly 1986) and analyses of conference's results for education in Zambia (Kokkala 1996). Especially donors have been interested structural adjustment and self help plans influences on education in Zambia (Coombe 1990, Achola 1990, Kelly 1991). As the structural adjustment concern also many other sub-Saharan African countries the studies have same time served both, Zambia and the matter as a whole. Third relevant entity of studies from my point of view is the

research dealing with the equality of education. This kind of studies, concentrating especially on equality of education in Zambia, has not been done extensively. However in most of the studies dealing with the 'Educational Reform', the 'Education for All' and education and economy, equality is of course one important dimension.

In 1977 the Government of Zambia promulgated a statement called 'Educational Reform; Proposals and Recommendations', which was a result of an extensive evaluation and formulation for a new education policy. The statement was design with an officially organized national debate on the ground of Draft Educational Reform statement, given in 1976. Although the statement was given under national debate, it was mostly accompanying the ruling party's UNIP's ideas of education. Also it stayed as the main policy document of education till the MMD took-over in 1991. Educational Reform 1977 was the first governmental policy document which expresses, earlier only in the UNIP party policy statements existing aim to provide 9 year universal compulsory basic education. (Zambia 1977, 7)

Daniel O'Brien has analyzed the Zambian national educational debate organized by the ruling party UNIP in 1974-1977 and the final result of the debate, the 'Educational Reform' statement given in 1977. In his article, Daniel O'Brien argues that during the debate and in the preliminary document 'Education for Development', there were introduced a 'revolutionary type education system' to improve the state of poorest rural people. He asks why during the debate 'innovations, design as they were to equalize opportunity, to give schooling for all, to make school leavers and productive members of the society so resoundingly rejected?' (O'Brien 1982, 229) As an explanation for this, O'Brien claims that the suggestions introduced during the debate were interpreted in final discussions as unrealizable and inappropriate to the country. Thus the final policy, the result of the educational debate represents the interest of the elite and middle class, who had a interest in retaining the status quo. (O'Brien 1982, 229)

In the article 'Problems of Educational Reform in Zambia' D. J. Alexander interprets the social outcomes of the Educational Reform similar to those introduced in Daniel O'Brien's article. Also the domination of elite groups in educational decision making process was notice by Alexander. He's opinion is that 'they (elite groups) have a vested interest maintaining in their present form those functions of the educational system which relate to social selection an the legitimization of poverty' (Alexander 1983, 203). In spite of attempts made by Zambian educators in all levels of education to achieve reforms which benefits the poor, the elite groups have been able to maintain the bases of the educational structure. Alexander also introduces -as an evidence of ideological effectiveness of the present educational system- that many people in rural areas, even that the system have not benefit them at all, still ask for greater access to structure and don't perceive it as unfair. Many rural school-leavers still see their failure from the educational system as their own fault. (Alexander 1983, 218)

Tom Draisma's (1987) study 'The Struggle Against Underdevelopment in Zambia Since Independence: What Role For Education' deals with educational policy

making in Zambia. It focuses specially on the National Debate on Education held in 1976-1977. The study analyses the actors participating in the debate, describes and evaluates the debate by introducing the aftermath of it. Draisma claims that the debate was organized so that 'urban center group voices deafened those of peripheral groups and their advocates, especially those in rural areas' (Draisma 1987, 512) and so the revised reform proposals introduced in the 'Educational Reform' statement were mainly different than in the preliminary discussion paper given by a governmental specialist group. Thus the National Debate on Education served urban minority groups, as middle class and elite. (Draisma 1987, 508-512)

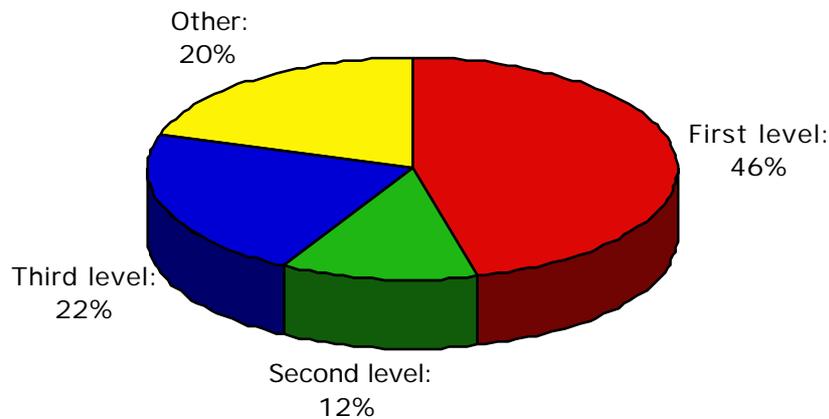
In 1991 Zambia attended the World Conference on Education for All, and organized in 1991 its own National Conference on Education for All. As a result of the conferences the Ministry of Education published in 1992 a statement 'Focus on Learning - Strategies for the Development of School Education in Zambia'. Pretty soon the new Government of Zambia, lead by the MMD, decided to acknowledge it as official policy on education (Zambia 1992, Forewords). The statements 'Focus on Learning' was still in 1996 the official education policy statement, even that the Ministry of Education has been preparing new policy on education. The draft, not verified, version of the 'National Policy on Education' was introduced in September 1995.

In last twenty years the public expenditure on education in Zambia has declined evenly. The government has been systematically cutting the expenditure on education since late early-1980's, when the education's share of the GNP was still about 4.5 to 6.5. percent. In the late-1980's the share was shrunken to under 3 percent and in 1993 the share of education was only 2.3 percent. In 1990's Zambia has been one of the countries with lowest allocations to education in the world. (World Bank 1995a, 77-78: UNESCO 1994a)

Shares between different levels of education has been changing during the last twenty years, too. In 1980's the share of first level education was decreased when the share of second level was increased. In 1980 the first level's share was about 45 percent and in 1989 only about 31 percent.⁹ In the 1990's the course changed and the first level education's share in the budget has been increased smoothly. In the 1994 education budget first level's share of total expenditure on education was 46 percent, second level got 12 percent, third level's share, including teacher training (4%), technical education (6%) and Universities (12%), was 22 percent. The category of other expenditures, containing study grants and departments (10%), administration (7%) and bursaries (3%) was 20 percent. The shares are shown also in the following table. (World Bank 1995a, 80: UNESCO 1994a)

FIGURE 3.2. THE TOTAL (CAPITAL AND RECURRENT) EXPENDITURE ON EDUCATION BY LEVEL IN THE NATIONAL BUDGET OF ZAMBIA IN 1994

⁹Statistics are based on the Ministry of Education of Zambia's announcement given to the UNESCO and the change in some schools from 7-year primary school to 9-year basic schools may destroy them.



(Source: World Bank 1995a)

The difference between the levels in the shares of public expenditure culminates by comparing them by unit costs. In figures of the year 1993 the annual cost of one secondary school student was about five times that for one primary school student. One student of Teacher Training Institute cost 46 times that a one primary school student, and one student of technical institutes cost 86 times that one student in primary school. In the university the public expenditure per student was 164 times the public expenditure spend into one primary student. (World Bank 1995a, 82)

In 1986 the Department of Education of the University of Zambia prepared an extensive study of the education sector. The study was undertaken by the Ministry of General Education and Culture and financed by the World Bank and the SIDA. The study pointed out three main problem of the system: inadequate finance, pressure of rapid population growth and undernourished state of many school-age children, which naturally had a strong impact on the learning situation in schools. Closely related to a inadequate finance the study introduced a number of other problems, as the poor state of school buildings, teachers' low level of wages and lack of educational materials. (Kelly 1986, 547-548)

The report of the FINNIDA and Zambia project identification missions in 1990 introduces new project areas for FINNIDA's future support to the education sector. The report also includes an outstanding study part, which includes analysis of the condition of the education sector in the context of the late-1980's state of national economy. First of all the study noticed the lack of finance for education. From the field of education the main study results were that, the existing resources were not used effectively, the production of educational data

for the use of decision making is inadequate, the standards of teaching are weak and the current vocational education is inadequate (Coombe 1990).

The World Bank study 'Implementing Educational Policies in Zambia' published in 1990 focuses on internal and external efficiency of educational system in Zambia. The study made by Paul P. W. Achola also notices the poor economy and ongoing population growth as a main problems of the educational system. In the analyses of the efficiency of educational system the study claims that high rates of unemployment after completion of primary and secondary school points to educational system's poor external efficiency. (Achola 1990, 33-34)

Also another World Bank study, 'Education in Declining economy - The case of Zambia, 1975-1985' by Michael J. Kelly deals with the finance of education and efficiency of the system. Kelly identifies two main problem of the educational sector during the years of declining economy in Zambia. Firstly lack of over-all finance on education became more marked during the years of economic difficulties. Secondly the decreasing over-all finance on education cause also serious structural unbalances within education sector. Declining resources seemed to be removed away from the primary, secondary, teacher training, and technical education to the university level. During the period of 1975-1985 the unit costs at the primary level fell 25 percent, in secondary level 50 percent, but at the university level they rose by more than 40 percent. Also within different education levels the resources has been used ineffectively. Nevertheless, despite the difficulties during the period of declining economy the education system displayed considerable strengthness by expanding the school system at both primary and secondary level and geared well to rapid growth of population. (Kelly 1991)

Equality of education in Zambia has been discussed in several studies as well. In her study Emmanuel M. Silanda found out that there are significant differences in educational provision along the rural-urban areas and regions. The study also indicates that the problem of disparities in the provision of education is closely related to differential socio-economic development of regions. Number of historical, cultural, demographic and economic factors can be named as origins for disparities in educational system. An historical factor is the educational measures used during the period of colonialism and the early years of modernization. In the first educational systems the disparities between regions in socio-economic development and education were self-evident and many of those disparities still exist. Cultural factors, as tradition and beliefs of communities, have been a major reason for rural girls low participation in educational system. Furthermore, in cultural terms, the educational system is more relevant to urban population than to people living in rural areas. However the low enrolment rates in urban areas, as compared to rural areas is attributed to the differentials in the population growth rates between the two areas. Migration to towns has increased the share of urban population but the educational provision has not increased in proportion. The economic factors, as the governments decreased allocation of education, has put more stress on parents and communities ability and willingness to support schools. When the regions' disparity in terms of income

and socio-economic development is huge, the cost-sharing mechanism has increased the disparities in the provision of school places. (Silanda 1988, 139-148)

Also the study 'Country Gender Analysis - Zambia' made by SIDA identifies the disparity of population between rural and urban areas having direct impact on education. The study claims that urban and rural differences in population have not been anticipated in educational planning. The gender structure of the society, which the SIDA is especially concentrating on, is inside the educational system quite simple; as the level of education increases, the number of women decrease. In 1990's girls have occupied almost 50 percent of the school places in primary level, but in secondary level the share of girls drops grade after grade so that in the grade 12, this group constitutes the lowest proportion, around 30 percent. In the university education the share of women is only about 20 percent. In the same way the share of women teachers decrease as a statue of institution and the level of education increase. (Siamwiza 1993, 4-7)

4. STUDY OBJECTS AND RESEARCH MATERIAL

4.1. Introduction

The objects of the study are the basis on which the selection of the research material and the methods has been submit to. This chapter introduces the objects of the study, the methodological decisions made and the primary research material collected to study the object.

4.2. Study Objects and Data Collection

The object of this study is the educational ideology of the World Bank and the Governments of Zambia. In the ideology of education the main focus is on the question of equality.

What kind of data could be collect of the educational ideology of the World Bank and the Governments of Zambia? At least there is three alternative data. Firstly, one could claim that the Executive Directors (or the staff) of the World Bank and the ministers of the Governments of Zambia should be interviewed and the answers could give a clear picture of the ideology they support. Another alternative method could be to investigate what the World Bank and the Government of Zambia have brought about in the education sector by collecting quantitative data of enrolments, projects, budgets, etc. and interpret the ideology of education from these deeds. A third possible data of educational ideology is the textual material, the education policy statement with by the World Bank and the Government of Zambia direct their action and make known their education policy.

By interviewing the Executive Directors of the World Bank and the ministers of the Government of Zambia (or the staff of these institutions) the researcher would pass the political decision making process of these institutions. This way the researcher would only be able to clarify the individuals educational ideology acting in the institutions - not the educational ideology of the institutions. The decision making process - democratic, autocratic or something in between them - is always reflecting the power structure in the institution. If the institution includes people with different opinions, as it seems natural in the case of the World Bank and the government of Zambia, the outcomes i.e. the decisions made are never a summary or a collection of different ideas and thought of those individuals acting in the institution. The decisions made in the institution are 'the institution's opinion'. In a study work of ideology of institutions it seems reasonable to collect data of the outcomes of these institution. The outcomes of the World Bank and the Government of Zambia can be divided to two groups: the first outcome is the textual education policy statements, and the second one is the deeds, the projects and activities in education sector carried out by these institutions.

With the study objects presented above I have closed to the textual policy statements as a primary research material and to use the available data of the deeds in education sector as a secondary contextual material introduced in the chapters 2 and 3 (The World Bank in Context and Zambia in Context).

This study is focusing on ideas, especially on ideology of education. The textual education policy statements will be studied as representation of the ideas. The study will also illustrate the meaning of sentences in the context where they were presented. In this kind of analysis of educational ideology the well done study of the secondary contextual material is extremely important. The significance of knowing the context in the study of political statement can be understood with an example from East Germany, where foreigners were amused by the slogan 'Hauptaufgabe' in every street corner. Foreign visitors could only guess what is the 'principal task', whereas local people knew it very well. (Palonen 1988, 43)

An often presented claim is that the textual policy statements are mere rhetoric without much to do with the reality. Undoubtedly the initiatives, plans and projects included into the textual policy statements can never be carried out as literally as they have been thought. This is because the textual plans are ideas, but the deeds are done. The gap between policy text and reality is founded as a fact. Thus the gap should be considered in the interpretation of the policy texts. It is important to decide, whether the interpretation of the policy text is done by considering the text only as a structure of ideas or also as a deed. (Palonen 1988, 156-157)

4.3. Research Material

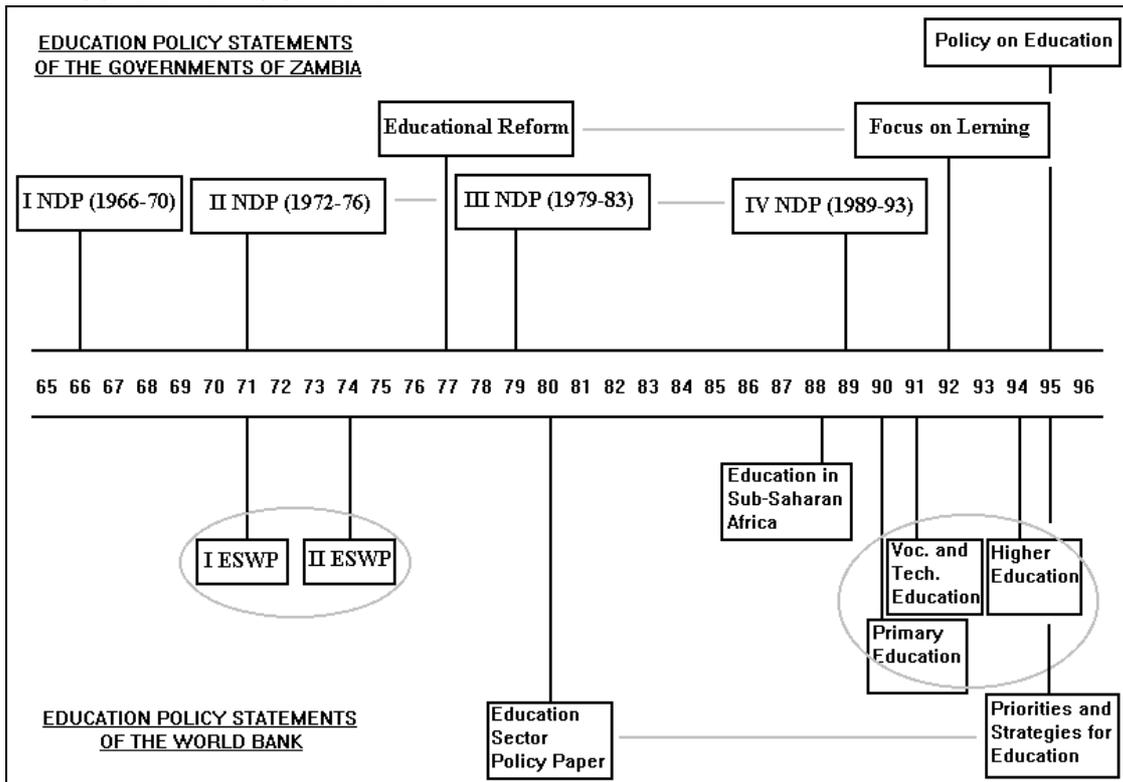
The primary textual research material consists of the documents published by the World Bank and the government of Zambia as their education policy statements. The primary research material includes all documents, which have been interpreted to present the official opinion of these institutions.

With the Government of Zambia the selection of research material fulfilling the requirements set for the material has been easy to carry out. The documents included to the primary research material have all been acknowledged as official policies of the governments.

With the World Bank the classification of those documents fulfilling the requirements has been more difficult to carry out because the Board of Executives has not officially acknowledged all documents of the Bank dealing with education policy. Thus the selection of primary research material of the World Bank is partly based on interpretation of the policy statements significance and status.

A number of studies and documents with a lot of policy opinions made by departments and staff members of the World Bank or by the Ministry of Education of Zambia has not been included to the group of primary research material as they don't fulfil the requirements set for the research material. This kind of material has been, however, mostly included to the secondary research material, as a part of the context introduced in the earlier chapters 3 and 4.

FIGURE 4.1. EDUCATION POLICY STATEMENT OF THE WORLD BANK AND THE GOVERNMENTS OF ZAMBIA



4.3.1. Education Policy Statements of the World Bank

Since the Executive Directors initial education policy was adopted in 1963, the World Bank has published four formal education policy statements dealing with the education sector as a whole. In 1970's the Bank presented for the first time its education policy to public with the *Education Sector Working Papers* in 1971 and 1974. Third formal education policy statement, *Education Sector Policy Paper* was published in 1980. Latest World Bank's overall education policy statement *Priorities and Strategies for Education* was announced in 1995. The Bank has also published four specialized education policy statements, known as policy studies and published in the series of *Policy Paper*, *Policy Study* and *Development in Practice*. The only document of education in the series of *Policy Study* is the *Education in Sub-Saharan Africa - Policies for Adjustment, Revitalization, and Expansion 1988*. It focuses specifically on the region with the worst problems in education in the world. The document is so far the only education policy study of the Bank dealing with a single region. Furthermore in 1990's the Bank has published three policy studies on education policy, dealing with sub-sectors of education. The papers *Primary Education* in 1990 and *Vocational and Technical Education and Training* in 1991 was published in the series of *A World Bank Policy Paper* and the document *Higher Education - The Lessons of Experience* in 1994 was published in the series of *Development in Practice*. However, even that these document's dealing with sub-

sectors of education has been published in different publication series, there has been produced in sequence and in relation to each other.

From the above policy documents of the World Bank the following five statements has been selected to the primary research material:

- (1.) ***Education Sector Working Paper 1971,***
- (2.) ***Education Sector Working Paper 1974,***
- (3.) ***Education Sector Policy Paper 1980,***
- (4.) ***Education in Sub-Saharan Africa 1988,*** and
- (5.) ***Priorities and Strategies for Education 1995.***

The sector documents dealing with primary, vocational and technical education, and higher education has not been included to the primary research material, as they have been interpret to be more studies than official policy statements of the World Bank. The sector documents status is either that high as the over-all statements included to the primary research material. It can be assumed that the sector documents, produced by relative small group of the Bank's staff are more trying to shape and effect to the policy formulation process of the World Bank general over-all education policy, than representing the actual policy.

The external appearances of the education policy statements selected to the primary research material are pretty similar. The first *Education Sector Working Paper* (1971) is relatively brief, only 28 pages and 10 pages of annex tables. The second *Education Sector Working Paper* (1974) is a little wider with 61 pages and 10 pages of annexes. The *Education Sector Policy Paper* (1980) consists of 10 chapters, 97 pages and 40 pages of annexes. The *Education in Sub-Saharan Africa* (1988) is divided into three parts, 9 chapters and is all together 112 pages. The statement includes as well, a wide (almost 100 pages) section of appendix , with tables, technical notes and maps. The 1995 statement, *Priorities and Strategies for Education* (1995) consists of six parts and 11 chapters. All together the 1995 statement is 115 pages.

4.3.2. Education Policy Statements of the Governments of Zambia

Since independence 1964 the Governments of Zambia has published three official education policy statements. The first official education policy statement *Educational Reform - Proposals and Recommendations* published by the first government of Zambia in 1977 was a result of extensive *National Debate on Education* held by the government during the year 1976. As Zambia had moved to one-party system in 1972 with support of President Kaunda and the leading party UNIP, the *Educational Reform - Proposals and Recommendations* statement was in its time an official education policy of the president, the party and the government.

The second education policy statement the *Focus on Learning* was prepared by a Task Force on Education for All founded by the National Conference on Education for All in 1991. The national conference was organized after the

government of Zambia had took part in the World Conference on Education for All in 1990. This way also the *Focus on Learning* statement was in the first place prepared under the UNIP lead government of Zambia. After the election and handover of power in 1991 the new MMD lead government examined the *Focus on Learning* statement and decided to acknowledge it as an official policy on education in Zambia in 1992 (Zambia 1992, Foreword).

Compared to the two earlier education policy statement of the Governments of Zambia the third statement *Educating Our Future - National Policy on Education* (1996) was prepared pretty much in silence. The Government of Zambia's third major education policy document is also the first education policy statement prepared and ratified by the MMD lead government. The statement was prepared over a period of more than two years in the Ministry of Education and before the final statement the Ministry published a number of draft versions (Takala 1998, 330). The final statement presents the statement as 'the fruit of this lengthy and broadly based consultation process', on which has participated a number of personnel from other government ministries, teaching profession and the universities, communities and the private sector, the churches and other non-governmental agencies, and international aid donors with the Ministry of Education's own personnel (Zambia 1996, viii)

The government of Zambia's first official education policy statement was published twelve years after the independence, the Government did not published any new education policy statement during the period of 1977-1990. For this reason the *National Development Plans* of the Government of Zambia has been studied from those parts dealing with education. All together the governments has published four National Development Plans; first in 1966, second in 1971, third in 1979, and fourth in 1989. The National Development Plans are mostly summarizing the achievements of earlier plans and presenting only scantily new priority areas and can not be compared to the overall education policy statements. The National Development Plan 1989, as well, presents in its part dealing with education, that it is committed to implement the Educational Reform of 1976 (Zambia - NDP 1989, 308). For these reason the National Development Plans has been left out of the primary research material.

Three education policy statement of the Governments of Zambia have been to select to the primary research material. These are:

- (1.) ***Educational Reform 1977,***
- (2.) ***Focus on Learning 1992,*** and
- (3.) ***Educating Our Future 1996.***

The three education policy statements of the Governments of Zambia do not differ much on their external appearance. The *Educational Reform* (1977) includes 17 chapters, 101 pages and 13 pages of appendices. The second general policy statement *Focus on Learning* (1992) consists of 14 chapters, 135 pages and 65 pages of annexes. By the number of pages the third statement, *Educating Our Future* (1996) is the widest statement. Altogether the statement

contain 176 pages, of which 6 pages are appendices. The 1996 statement is composed of 7 parts and 16 chapters.

5. METHODS OF ANALYSES

5.1. Introduction

The present chapter introduces the methods of analyses used to study the primary textual research material. The chapter starts by explaining the philosophical approaches, which have led to particular methodological decisions. The methods of analyses of the study are decoding and interpreting political text in specific context with special focus on equality of education and author and audience of the texts.

5.2. Decoding and Interpreting Political Text

The philosophical approach of this study is agnosticism. Essentialism and conceptual realism, where entities actually exist in a way or another, have been abandoned consciously. As a philosophical standpoint, agnosticism of this kind, however, does not end up arguing that things for sure are not in a certain way - which might be understood as a standpoint of philosophical relativism. In the approach of this study, it is not necessary to argue about whether things 'really' are in a certain way or not. From this standpoint it is perfectly content to remain in analyzing different viewpoints, the contents of different interpretations, rhetoric, argumentation, etc. (Palonen 1988, 16)

When the object of the study is educational ideology, more specifically ideas of equality of education in the World Bank and the Governments of Zambia and the actual research material are educational statements of these institutions; the only reasonable method is textual analyses. As the statements are not clearly ideological writings and as they include only few utterances referring straight to equality of education the use of quantitative context analysis is unfit for this study. Also, my approach to study ideology of education from the point of view of equality of education demands to interpret the whole statements from this point of view. It can be suggested that studying only utterances dealing with equality of education do not give a sufficient picture of the statements educational ideology or thoughts of equality of education included in them. Significant utterances from the point of view of this study are, for instance, finance of education, cost-sharing mechanisms, examinations and selection as they effect on the individual in the educational system.

The method of this study can be defined to be qualitative interpretation of textual material. Kari Palonen calls this method as *eksegesis*¹⁰, where the idea is to take apart interesting meanings from the text and interpreted the whole text by decoding meanings hidden in the text (Palonen 1988, 29). In this study the *eksegesis* will be used as a preparatory instrumental tool for later interpretation. In the *eksegesis* (or decoding) of the education policy statements, this study concentrate on such components in the statements evaluated to be significant from the point of view of the research object - the ideology of education. This way

¹⁰ *Eksegesis* is Greek and means explanation, interpretation.

the main operation of interpretation is to evaluate the relation between the research object and the research material and will finally lead to the setting of questions (Palonen 1988, 137-138). Thus the final research questions posed to the research material will arise from the material itself and can not be set before being acquainted with the actual research material. The questions set can naturally also change during the research process as the material becomes more familiar.

As a pitfall of this kind of method can be claimed that the interpretation is never objective and value-free, even if it would be the researcher's aspiration. For this reason it is important to notice that the interpretation done in this study is only one possible outlook on the matter and that there are a number of other alternative interpretations. To increase the value of the study it also describes its own position and approach to the matter by every possible means. In this way the reader is able to evaluate the interpretation presented in this study and able to form her or his own opinion.

According to Kari Palonen all research is interpretation. He claims that in the research, ideas and concepts are never replaced with 'knowledge' but the researcher can replace one kind of ideas and concepts with another kind of ideas and concepts. Thus interpretation and research in general is always defective and unilateral. However, the notion that there is another possible interpretation of the objective does not itself reduce the value of the study. More important is that this matter has been taking in account and has been disclosed. (Palonen 1988, 15)

Firstly the decoding and interpretation of the primary research material aims to classify all statements to Husen's (1972) module of three major historical stages in the development of conception of educational equality: conservative, liberal and radical (introduced in the Chapter 1). Secondly the analyses go forward by trying to understand more deeply the reason behind the presented conceptions of educational equality of each statements. The second analytical operation tries to illuminate the background by defining explicit and implicit authors and audiences of the statements.

5.3. Argumentation and Audience

Within the decoding and general interpretation of the primary research material the most important meanings, arising from the documents, will be analyzed by defining the argumentation strategies used by the authors. Specific theory of argumentation will be used to reveal the rhetoric in the statements. The aim is to describe and understand better the way the World Bank and the Governments of Zambia argue on education. For this purpose the primary research material will be analyzed in the framework of Chaïm Perelman's *theory of argumentation*.

Perelman's theory gives studies dealing with rhetoric an analytical framework to specify the factors making text persuasive. For Perelman rhetoric is a combination of form and content, where both elements are meaningful in the

purpose of being convincing. For Perelman rhetoric is argumentation - way to deduce and convince. (Summa 1996, 65)

In Chaïm Perelman's *theory of argumentation*, presented in his principle works *Traité de l'argumentation: La nouvelle rhétorique*¹¹ (1958) and *L'empire rhétorique*¹² (1982) with Lucie Olbrechts-Tyteca, the starting point is to distinguish argumentation from the concept of demonstration. The strength of demonstration in the formal logic is that symbols and rules are chosen in a way that they avoid doubt and ambiguity. It means that deduction concludes to the right and final result, as long as the symbols and rules are followed. Demonstration is a way to prove the 'right' deduction, whereas argumentation is always related to probability. Demonstration is a way to present the 'right' deduction without paying any attention to whether anyone is adapting it or not, whereas argumentation aims to 'adherence of minds' by rational deduction. Thus the main difference between argumentation and demonstration of formal logics is the relation to the audience they indicate. Argumentation's main intention is always to reach an approval of some audience, which can be defined or undefined. Characteristic for argumentation is also that it is contrary to forcing - in a position of having force there is no need to argue. Nevertheless, the speech must be heard, as a book must be read, in order to have any effect, which means that the speaker needs to be able to speak or write in certain circumstances, to be the spokesman for a group, institution, or state. (Perelman 1969, 13-14; Perelman 1982, 9-11 and ref. Summa 1996, 62-73)

Perelman's theory emphasizes the significance of audience in argumentation and rhetoric. Arguments are always addressed to audiences for the purpose of inducing or increasing audiences' adherence to the thesis presented. The audience can be universal, so that it contains all judicious people, who are able to understand the speaker or writer presenting arguments. Contrary to universal audience the audience can also be specific and defined and may include the arguer's self. To be successful with audiences, arguments presented have to proceed from premises that are acceptable to the audiences. The arguing always includes procedures by which ideas and values can be given special presence in the minds of those addressed. Thus the more united and coherent the audience is, the easier it is for the speaker to present arguments obtaining 'adherence of minds'. If the audience consists of people sharing the same conviction, religion or scientific thinking the speaker or writer may assume that if the arguments are making an appeal to right authorities, such as socialism, god, or prevailing economic theory, they will be approved. On the other hand if the audience is very broad and universal, such as international community, the speaker's or writer's problem is to justify the arguments so that they are not contradictory. To make his discourse effective, a speaker or a writer must adapt to his audience, which means that the speaker or the writer chooses premises of argumentation these

¹¹ Published in English in 1969, by title *The New Rhetoric - A Treatise on Argumentation*.

¹² Published in English in 1982, by title *The Real of Rhetoric*.

audience already holds. (Perelman 1969, 13-54; Perelman 1982, 9-40 and ref. Summa 1996 62-73)

In the book *The Realm of Rhetoric* Perelman also considers the problem of interpreting textual data. He maintains that for centuries, for caused of rationalistic thinkers in the history of philosophy, mathematical language has been considered as a model for ordinary language, where messages are clear and that multiple interpretations are the result of their authors' negligence or the interpreters' bad faith. Today it is generally recognized that in natural language, ambiguity is never entirely avoidable as the language must be used, is inevitably equivocal and incomplete. The terms that are available are often open to more than one single interpretation. This means that since words alone cannot guarantee infallible comprehension of a message we must look outside the world of the message - in the verbal or nonverbal context, in what we know of the speaker or writer and his audience. (Perelman 1982, 41-47)

In this study, Perelman's theory of argumentation will be used as a framework to analyze the arguments presented in the primary research material. The focus is on how to understand the argumentation of the statement as an effort to convince some audience, universal or specific. The analytic operation is to specify the authors and the audience of the research material - the education policy statements of the World Bank and the Governments of Zambia.

6. STUDY RESULTS

6.1. Introduction

This chapter introduces the study results by presenting an analysis of each educational policy statements selected to be the primary research material of this study (introduced in the Chapter 4). The chapter introduces all statements' main themes and ideas of educational equality and classifies them to Torsten Husen's (1972) module of three major categories of conception of equality of educational opportunity (introduced in the Chapter 1). The categorization is based on qualitative interpretation of the statements where the interesting meanings have been taking apart from the text and interpreted by decoding the hidden meanings (Palonen 1988, 29).

The chapter proceeds by analyzing the explicit and the implicit authors and audiences of the statements. These analyses are trying to enlighten and understand the reasons why the conception of equality of education is changing from one statement to another. The analyses of authors and audiences also illuminate the situation in international education politics of the time and may give some tools to understand the current situation. The statements have been analyzed in the framework of Chaïm Perelman's *theory of argumentation* (Perelman 1982).

6.2. Equality of Education in the Statements of the World Bank

6.2.1. Education Sector Working Paper 1971

The first two formal education policy statement of the World Bank, the *Education Sector Working Paper 1* and 2 were published in 1971 and in 1974. The first statement was introduced as the first public summary of project experiences and as the first formal statement of the Bank's lending criteria for education sector. The first statement is mostly summing up the Bank's already existing policy on education. The statement does not formulate any new policies. One reason for this can be the exceptional preparation of the statement. The Bank's education director at that time, Duncan Balantine, was asked to write the statement just by himself with in z four days deadline frame, by order of the Executive Directors (Jones 1992, 103). Main policy objectives of the *Education Sector Working Paper 1971* were to continue lending on technical, agricultural, teacher training and general secondary education. As a new possible increasing and interrelated areas of lending, the statement introduces non-formal education and training, educational radio and television, programmed lending and teacher materials and equipment. (World Bank 1971)

Two general premises on which the World Bank's *Education Sector Working Paper 1971* is based on can be analyzed. Firstly the statement notes that 'education is now universally accepted and demanded as essential to participation in the development process and to improvement in the condition of individual life' (World Bank 1971, 6). The sentence describes the political premise on which the statement is tied up and dealing with. The second premise

reiterated in the statement, is the Bank's role of being a financial institution supporting economic development. The statement considers education as a mean to produce manpower and increase human resource in order to forward development of modern economy in the developing countries (World Bank 1971, 6, 8-11, 13-14).

The *Education Sector Working Paper 1971* does not state any explicit argument on equality of education opportunity. Equality of educational opportunity has not been introduced as a goal in the statement. Education has been introduced as a mean to produce trained manpower to forward economic development in the developing member countries of the Bank (World Bank 1971, 13). As the statement does not see education as a goal itself, it can be interpreted that the statement's view on equality of education is subordinated to economic development. As a policy implication, it would mean that if the aspiration to educational opportunity is contrary to the economic development, education should be sacrificed. It can be interpreted that the conception of educational equality presented in the World Bank's *Education Sector Working Paper 1971* is mostly conservative.

6.2.2. Education Sector Working Paper 1974

The second formal education policy statement was published in December 1974. The new *Education Sector Working Paper 1974* introduces far more entirely new policy objectives on education than its predecessor three years earlier did. The 1974 statement is much more trying to formulate the policy, not just introducing the Bank's policy, by its action in education sector (Jones 1992, 120). Five basic issues in the *Education Sector Working Paper 1974* are: (1.) skill development and its effects on productivity, (2.) participation in education and development, (3.) education and equity, (4.) efficiency of education and (5.) educational planning and management (World Bank 1974, 3-6). The 1974 statement introduces also the Bank's four broad principles to promote 'balanced educational development' as follows:

(a) That there should be at least a minimum of basic education for all, as fully and as soon as available resources permit and the course of development requires.

(b) That further education and training beyond the basic level should be provided selectively, to improve quantitatively and qualitatively the knowledge and skills necessary for the performance of economic, social and other developmental roles.

(c) That a national system of education should be viewed as comprehensive learning system embracing formal, nonformal and informal education and working with maximum possible internal and external efficiency.

(d) That in the interest of both increased productivity and social equity, educational opportunities should be equalized as fully as possible.' (World Bank 1974, 52)

The second World Bank statement, *Education Sector Working Paper 1974* deals much more with the question of equality of educational opportunity than its predecessor statement in 1971. First of all the statement is based on a thought that mass participation in education should be ensured (World Bank 1974, 27-28). The statement argues that 'the provision of minimum education is a necessary condition for the effective participation of the masses in productive life, as well as in the social and political process' (World Bank 1974, 28). The statement also pleads to the UNICEF's definition of minimum learning needs, which can be compared to the term 'poverty line' which refers to minimum family income. The 'minimum learning package' includes functional literacy and numeracy, knowledge and skills for productive activity, family planning and health, childcare, nutrition, sanitation and knowledge required for civic participation. (World Bank 1974, 30)

The 1974 statement argues also more specifically on the equality of educational opportunity than the 1971 statement. It recognizes such problems of equality as educational systems discrimination in their process of selection, promotion and future determination of careers. The statement presents that in many countries the discrimination has been based on socio-economic origin, sex, ethnic origin and religion. (World Bank 1974, 34) The statement deals also with the problem of income distribution linked with education, as follows: 'Because of the combined effect of the tax systems and the pattern of distribution of educational services, the concept of 'free education', which is intended to assure equality of opportunity, in fact operates as a mechanism by which income is transferred from lower- and middle-income groups to upper-income category' (World Bank 1974, 34). Significant and exceptional in the *Education Sector Working Paper 1974* is the way it comprehends educational equality and social equality as entities linked and effecting on each other.

Another premise of the 1974 statement is the World Bank's general, but still in the 1970's fairly new aspiration to target its aid to the poorest - called as a 'poverty focus' in the Bank. The World Bank's development strategy is introduced as 'directed to sharing the benefits of growth as well as the growth itself' (World Bank 1974, 3) and in education it means an aspiration 'to reach neglected target groups' (World Bank 1974, 34). According to the statement the Bank wants to readdress the imbalance in educational opportunities among different geographical, ethnic, social, sex, income and age groups. Further more it wants to be sure where the funds really go and who benefits most (World Bank 1974, 56).

The *Education Sector Working Paper 1974* find out the concept of educational opportunity not only as equal access to education, but also as a state of affairs where educational achievements have been equalized. The statement presents that equalizing access to education is a necessary first step, whereas equalizing the chances for achievements is more difficult objective. To reach equal achievements educational system can be instrumental in providing to the underprivileged children those elements lacking in their homes. The statement, however, recognizes that most of the variables causing inequity can not be

affected by educational policies. (World Bank 1974, 34) Thus the statement states that 'equity through education can be achieved only with the context of broader social policy' (World Bank 1974, 36).

The 1974's statement evaluates also the examination procedure used in the educational systems to promote and select pupils. The statement argues that examinations and diplomas have been frequently criticized as factors reinforcing the regressive effect of education. The statement takes into account alternative, more flexible aptitude and attitude tests and 'quota systems' where quotas has been set to equalize the chances for promotion of students form underprivileged population groups. Later, however, the statement presents that fully practical alternatives to current testing at schools have not yet been developed. (World Bank 1974, 35)

The rhetoric structure of the 1974 statement's chapter *Education and Equity* is inconsistent. In the early paragraphs the chapter presents point of views on a connection of education and social equality, but notes in the last section as follows: 'The preceding paragraphs deal only with the question of educational opportunity. They do not cover the broader issues relating education to income distribution and social mobility'. (World Bank 1974, 35) It can be assumed that the rhetoric structure chosen is a consequence of the extensive and heterogeneous audience of the statement. By presenting point of views on social equality, in a context of educational equality, the author is probably trying to persuade audiences demanding active social policy with income distribution and social mobility. The later withdrawal can be interpret to be done in order not to loose approval of those audiences, who do not support this kind of active social policy.

The conception of equality of educational opportunity included in the *Education Policy Paper 1974* is not clear and difficult to locate to Husen's framework of conservative, liberal and radical conceptions of equality of educational opportunity. The conception presented in the statement's argumentation includes features from liberal and radical conceptions of equality of education. The references to 'target groups' and 'providing to underprivileged children those elements lacking in their homes' (World Bank 1974, 35) can be interpret to be connected with the liberal conception of educational opportunity, whereas the notice of possible 'quota systems' (World Bank 1974, 35) is definitely reflecting the radical conception. It can be interpreted that the statement proposes the ideas of radical conception of educational equality (for one reason or another), but pledges to the liberal conception.

6.2.3. Education Sector Policy Paper 1980

The third overall education policy statement of the World Bank, the *Education Sector Policy Paper 1980* was printed in English, French, Spanish, Arabic and Japanese and the Government of China translated it into Chinese for distribution among Chinese educators. In total some 40 000 copies of the statement were printed and distributed worldwide to developing countries as well to developed

countries. The policy paper has been used as a textbook at some universities, too.

The focus of the statement is on theoretical presentation of educational development and finance, introduced in the first part of the statement. For instance Philip W. Jones (1992) has claimed that 'very few of content are a policy nature at all, much of the paper being textbook-style discussion of the role of education in development' (Jones 1992, 158). The statement's seven main issues of the first part are: (1.) relationship between education and development, (2.) the state of educational development, (3.) expanding and equalizing education, (4.) internal efficiency of educational systems, (5.) education and work, (6.) administration and management of education, and (7.) costs and finance. Under these main issues the aspiration is to introduce the theory of development, educational development and finance. The second part of the statement describes the past of the external aid on education of the World Bank and other donor agencies and formulates future policies and programs of the Bank.

The 1980 statement outlines five principles of which the future lending on education of the Bank should be based on. The five principles are:

'1. Basic education should be provided for all children and adults as soon as the available resources and conditions permit. In the long term, a comprehensive system of formal and nonformal education should be developed at all levels.

2. To increase productivity and promote social equity, efforts should be made to provide education opportunities, without distinction of sex, ethnic background, or social and economic status.

3. Education system should try to achieve maximum internal efficiency through the management, allocation, and use of resources available for increasing the quantity and improving the quality of education.

4. Education should be related to work and environment in order to improve, quantitatively and qualitatively, the knowledge and skills necessary for performing economic, social, and other development functions.

5. To satisfy these objectives, developing countries will need to build and maintain their institutional capacity to design, analyze, manage, and evaluate programs for education and training.' (World Bank 1980, 10)

The third overall education policy statement of the World Bank, the *Education Sector Policy Paper* (1980) deals a lot with the question of equality of educational opportunity. The first two principles are the most relevant from the point of view of this study.

According to the first principle the World Bank is first at all focusing on basic education. To provide basic education is simply the principle number one. This principle can be seen also as an allusion to the idea of education as a human right. This idea appears also later on in the statement, in the chapter 3, 'Expanding and Equalizing Opportunities', which starts with the well-known

quotation from the UN's Universal Declaration of Human Rights (World Bank 1980, 23).

From the first principle, however, it can be noticed that the Bank's conception of equality of education is different, than the one introduced in the UN Declaration. In the UN Declaration the education is a human right, which should be provided in all circumstances - breach of human rights can never be justified. The World Bank's principle number one emphasizes also that basic education should not be provided before a certain 'resources and conditions' do permit. Because the statement does not define these 'resources and conditions' it can be interpreted as a reserve. The expression of 'as soon as resources and conditions permit' appear already in the Education Sector Working Paper of 1974, where it has been used in a context of providing minimum basic education for all (World Bank 1974, 6). The first principle gives a lot of space to make, in every separate situation, the decision of the possibility and the need to provide basic education for all. This principle can also be interpreted as an expression of the World Bank's rationality: the Bank in a way accepts the world as a place where basic education cannot be provided, or at least is not rational in every case for everyone.

The Bank's rhetoric structure of referring first to the Universal Declaration of Human Right and later slackening it, can be interpreted to be (once again) a consequence of the statement's heterogeneous audience. With the reference to universally accepted declaration the author, the World Bank, is aspiring an universal acceptability. By expressing conditions necessary to execute the human right, the author is possibly trying to assure the audiences more interested to see the Bank more as a reliable financial institution, where decisions are better made based on economical facts than on UN Declarations.

Also the second principle (see above) concerning social equity and educational opportunities is based on rationality. The fragment presents that equality in the education opportunities is not the aim. The primary aim is the productivity and the social equity. The equality in the education opportunities is important only because it has a positive effect on productivity and social equity. The idea of education presented in this principle can also be described with economical concepts of investments and profits. The investments are the efforts made to provide education opportunities without distinction. The profits of these investments are increasing productivity and social equity. The fragment states and argues that equality in the education opportunities is economically rational and for this reason important issue.

The 1980 statement, the Education Policy Paper, deals a lot with the question of women's educational opportunities. Compared to the earlier statement of 1970's the girls' and women's educational opportunities is a new matter of concern of the World Bank. In the 1980 statement the Bank lists the main factors on which the unequal educational opportunities are based on, as follows:

'In addition, there are unequal education opportunities within countries based on sex, socioeconomic status, and different regional, rural, urban, and sometimes, ethnic background. Of all the disparities, none is of greater hindrance to

development than that based on sex. If the greatest single obstacle to improvement in general living conditions is continuing population growth, and if the social, economic, and educational status of women significantly affects fertility levels, then the education opportunities available to women are of crucial importance.' (World Bank 1980, 24.)

By decoding the fragment it can be noticed that the argument is firstly referring to premises of universal norms such as 'all human being are born equal and free' and 'education is a human right'. Secondly the argument is based on an opinion that 'economical development is important and good for all human beings'. The fragment also contains two conditional clauses: 'if the greatest single obstacle to improvement in general living conditions is continuing population growth' and 'if the social, economic, and educational status of women significantly affects fertility levels'.

The incoherent and complicated structure of the argument presented can be interpret to be a consequence of different audiences of the statement. For some audiences the premise of human rights is well acceptable backing of argument, whereas some audiences are possible more willing to accept the premise of economic development's significance. To obtain the adherence of minds of the both audiences, the author has ended up to the above argumentation.

The conception of equality of educational opportunity presented in the *Education Sector Policy Paper 1980* statement can be interpreted to be fairly conservative. Equality of education is important as a human right but only if it does not hamper economic development in any level or time span. The statement does not deal with questions of intelligence or ability of individuals as a restriction of education or as a ground of selection. The statement is more interested in resources and conditions of economy as a restriction of education in general. It can be interpreted that the 1980 statements conservative conception of educational opportunity is based on an opinion, that the conservative conception of equality is the only conception which developing countries can afford.

6.2.4. Education in Sub-Saharan Africa 1988

The *Education in Sub-Saharan Africa - Policy for Adjustment, Revitalization, and Expansion* statement 1988 was prepared as a first study in a series that the Bank was willing to evoke discussion of sector policies for Africa. The study states three main objectives of itself. The first is to identify and describe problems in educational development in Africa. The second is to provide leaders in African countries with comparative data and analytical tools for developing policies and priorities. The third is to suggest specific policy directions for consideration by national education authorities and donors. (World Bank 1988, xii)

In its construction the paper follow these objectives. The part I, *The Policy Context*, is a historical overview to education in Sub-Saharan Africa, with description of the main problems nowadays. The first part also includes a lot of statistics data of education in Sub-Saharan Africa. The part II, *Policy Options for African Governments*, treats the whole education sector by sub-sectors of

primary, secondary and higher education. The statement defines main problems in these sub-sectors in Sub-Saharan Africa. With the definitions the statement gives short recommendations of possible policy directions to solve the problems. Finally the second part of the statement deals with educational management and organization, with desire of using available resources more efficiently. The part III, *An Agenda for Action*, includes more recommendations of education policy directions. Main policy issues by the statement in education sector of Sub-Saharan African countries are:

- (1.) adjustment,
- (2.) revitalization and
- (3.) selective expansion.

Adjustment means diversifying sources of finance and reducing unit costs. In the revitalization, main areas are restoring quality by improving teaching materials, equipment and physical plant and academic standards. In the selective expansion priorities should be given to progress towards universal primary education and to promote distance education programs, in work training and research and pro graduate education. The statement concludes in a description of the international assistance for African educational development and with a call to action directed to donors and African governments. (World Bank 1988)

The *Education in Sub-Saharan Africa 1988* statement does not present explicit conception of equality of educational opportunity. The main concern of the statement is to introduce tools for African countries to adjust their educational services to current demographic and fiscal realities, revitalize their systems to take maximum advantage of the capacity of it, and to promote selective expansion of education.

The statement's main arguments on revitalization's and expansion's importance of education in Africa are based on economic factors. The statement presents that 'great investments in education can at this time in Africa, be expected to yield broad economic benefits' (World Bank 1988, 6). According to the statement, education's returns includes higher incomes in terms of more productive labor and lower fertility which leads to healthier and longer lives. Another set of benefit of education, introduced in the statement, is education's possibility to strength nation-building in African countries. (World Bank 1988, 7) Finally, in the end of the introduction of education's benefits, the statement presents that, 'above all, education is a basic right, an end itself, an intrinsic part of life and development' (World Bank 1988, 7). The statement leans primary on premise of economy, even that it notices also the aspect of education's role as a human right.

In the part dealing with the question of selective expansion, the statement presents that it is difficult to separate unequal participation in education, from that of low overall participation. The statement end up to the conclusion that, increase in overall participation will necessarily benefit also disadvantage groups. (World Bank 1988, 31) Later on the statement, states that the extension of primary education is perhaps the most important educational policy for addressing

unequal income distribution. As an evidence of it, the statement presents the experience of the World Bank, which has shown that giving the poor a productive asset such as education is one of the most effective way to address their needs. The transfer of education to the poor has been seen even more effective than transferring income to them directly. (World Bank 1988, 38)

The statement does not, however, mention any possible compensatory activities or setting of target groups of poor people to improve directly the equality of education in primary level. In the part dealing with equity and expansion, the statement does not clearly recognize education as an intrinsic part of life and development or human right as an end itself (World Bank 1988, 31). The statement sees that general expansion of education will finally benefit also the poor people's economic state.

Most straight references to questions of equality of education are presented in the part dealing with secondary education. The statement finds out females unequal participation in secondary schools of Africa as a main concern in the set of issues relate with equality of educational opportunity (World Bank 1988, 61-62). The idea, that expanding education is only reasonable way to benefit disadvantage groups, appear also in the recommendations presented in the statement. The statement's third recommendation starts as follows:

'In most African countries it will not be possible to expand secondary and tertiary education significantly - in particular, enough to reach far more females and more people from remote rural areas and disadvantage social classes - unless policies are adopted to substantially reduce unit costs' (World Bank 1988, 61)

To reach far more disadvantage groups by expanding secondary and tertiary education is not that uncomplicated model as it has been introduced in the statement. By recognizing the idea that the basis of inequality are in the 'culture of poverty', as the radical conception of equality of educational opportunities does, the expanding of education alone does not necessary benefit the disadvantage groups. It can be assumed that the disadvantage groups are not willing to take part in the expanding of higher education, as long as it does not respond to the requirements of the 'culture of poverty'.

The bases to judge existing inequalities in participation of secondary education are mostly economical. The statement presents that 'unequal access to educational services is not only inequitable; it is also inefficient, if those less able to benefit from education gain access ahead of those who are more able' (World Bank 1988, 61). The statement does not determine 'inequitable', but it can be assumed that in this connection it has been used to refer to 'unfairness' or 'injustice'. The idea that equality of educational opportunity is important because inequality is inefficient can be interpret to indicate fairly conservative conception of equality of educational opportunity. However, the way the statement presents it's worry about that unequal access, may hinder also the access of those who would have been able to study, can be seen as an conservative believe on valid measurement tools of intelligence and ability. At least the statement does not

present any doubt on the ways the intelligence and ability is measured in educational system.

The statement, however, hold also some fairly liberal recommendations to reduce inequality of education. The liberal compensatory activities suggested are focusing on ways to improve the girls' opportunities to take part in education. Any liberal ideas, however, are not introduced within disadvantage or poverty groups. The statement presents that governments could reduce the private costs of girls' education in relation to boys' by, for example, providing girls with free books and other material, charging lower tuition fees and offering school meal program for girls. (World Bank 1988, 62)

The 1988 statement presents criticism that the African public financed higher education, where students, their families, and their future employees are spared having to make any contribution on the costs is inequitable and inefficient. The consequence of this is that income inequalities are increased by the sharply regressive effect of higher education. 'The system ensures that the rich get richer and the poor get poorer.' (World Bank 1988, 77.) The statement presents as well, that if the educational system is considered as a whole, where higher education is a sub-sector, it means that the great investments on higher education are actually inefficient use of resources. To solve the problems of African higher education the statement recommends (1.) more privately owned and financed institutions, (2.) tuition fees to public institutions, (3.) 'national service obligations' for students (teaching, working in distance education centres, participating in adult literacy campaigns), (4.) promoting educational credit market, (5.) special tax on tertiary-level graduates and effective system of graduated income tax. (World Bank 1988, 77-80) The statement presents as well that the inequitable effects of these measures 'can be mitigated by the provision of scholarships based on need' (World Bank 1988, 80).

It can be interpreted that the arguments and the recommendations presented in the *Education in Sub-Saharan Africa* (1988) statement are reflecting to all three conception of equality of educational opportunity. The firm efficiency approach of the statement, which comes above everything else, can be located to conservative conception, whereas the compensatory measures for women and disadvantage groups and the tuition fees for higher education, combined with target scholarships can be interpret referring to liberal and radical conception of equality of education opportunity.

6.2.5. Priorities and Strategies for Education 1995

The latest overall education policy statement of the World Bank, the *Priorities and Strategies for Education 1995* is divided into three parts. The first, relatively short part (10 pages) contains a theoretical approach on education and development. Main issues in the first part are (1.) education and economic growth, (2.) education and labour market, (3.) education and poverty reduction, and (4.) linkages between education, fertility and health. The second part concentrates on to present the 'record of experience'. The part contains a number of statistics of education, such as enrolment, expected years in school, population growth, out-

of.-school children, gender gaps, reading achievements, public finance on education and student-teacher ratios in different regions and countries. The second part is mostly an overview on education in global context. The third part sums up the World Bank's opinion of the main problems in the education of developing countries and presents the Bank's solution. The third part of the statement concludes in four priority areas in need of improvement in education in developing countries. These factors are: (1.) low access to education, (2.) low equity of education, (3.) low quality of education, and (4.) delays in reforms of education (World Bank 1995b, 57-58).

After introducing the four main problems of education, the statement states six most important reforms required to solve these problems. The reforms proposed are pointed for governments to redefine their role in six key ways in their effort to reform finance and management of education. The statement underline that appropriate priorities of the key reforms are depending on the country circumstances. The six key reforms are:

(1.) *a higher priority for education.* The statement points out that education is important for sustainable, long-term development and the reduction of poverty.

(2.) *greater attention to learning and labour market outcomes.* The statement underlines that the educational priorities should be appointed more through the use of economic analyses and through setting of standards. This way the education should more clearly respond to the demands of labour market and economy.

(3.) *focus public investments on basic education, coupled with more reliance on household financing for higher education.* The public financing should be strongest at the basic levels. At the same time as the government is focusing on basic education, it should arrange measurements to share costs of higher education with parents and students.

(4.) *greater attention to equity.* This means that everyone should have a basic education and that potential students will not be denied access to higher levels of education. The equity is also an indicator of the educational systems efficiency, as economic growth will be higher the broader the base of education in the economy.

(5.) *greater household involvement.* Participation of household in the educational institutions will ensure that institutions will be more accountable for their performance.

(6.) *more autonomous institutions.* The quality of education will increase if schools and other educational institutions are allowed to plan their activities from the needs of the community their are working at. (World Bank 1995b, 57-95)

It can be interpreted that the Priorities and Strategies for Education (1995) statement do not make any firm stand for any conception of equality of educational opportunity. The statement is realistic. The problems of educational systems in developing countries in general, and in the field of equality of education in particularly, are so wide that the statement is truly satisfied just to

argue 'that everyone should have a basic education and that potential students will not be denied access to higher levels of education'. The statement does not give any answers to questions why and how. The ideological basics are hidden and the exact weak argument may lead to number of different realizations.

The following table 6.1. show the education policy statements of the World Bank in categories by the conception of equality of education interpreted from the statements.

TABLE 6.1. CONCEPTIONS OF EQUALITY OF EDUCATIONAL OPPORTUNITY IN THE EDUCATION POLICY STATEMENTS OF THE WORLD BANK

Radical					
Liberal					
Conservative					
	Education Sector Working Paper 1971	Education Sector Working Paper 1974	Education Sector Policy Paper 1980	Education in Sub-Saharan Africa 1988	Priorities and Strategies for Education 1995

■ = major ■ = minor

The analysis shows that three of the statements of the World Bank include at least two different conceptions of equality of education. The *Education sector Working paper 1974* is at the same time referring to radical and liberal ideas. The *Education in Sub-Saharan Africa 1988* contains all three conceptions of equality but the radical and liberal ideas are more common than the conservative. Also the *Priorities and Strategies for Education 1995* is referring to both conservative and radical ideas but the radical ideas are more strongly presented.

6.3. Equality of Education in the Statements of the Governments of Zambia

6.3.1. Educational Reform 1977

The main issue in the *Educational Reform -Proposals and Recommendations 1977* is the new educational structure referring to the primary education. The most outstanding modification presented in the statement is the change from the seven years primary education to nine years universal basic education. The statement describes the new educational structure as follow: '... the ultimate goal should be to provide nine years of universal basic education, whereby a child

entering Grade 1 at the age of seven will remain in school for at least nine years until the end of Grade 9 at age of sixteen' (Zambia 1977, 7). In the suggestion of the new education structure the statement also presents problems and weaknesses of the old educational structure, based on seven year primary education and 2 + 3 years of secondary education.

Another main issues in the *Educational Reform* statement are (2.) the sub-sectors of education; special education, technical education and vocational training, continuing education, teacher education and pre-school education, (3.) curriculum development, (4.) evaluation, examination, certification and selection, (5.) production in the educational system, (6.) the role of non-governmental agencies in education, (7.) mobilization of manpower and other resources, (8.) organization and management and (9.) the role of students in national development. (Zambia 1977)

The last chapter summarizes the statements main recommendations for the Ministry of Education in its effort to implement the UNIP's and the Government's policies on education. The chapter states the policies and the main functions of the Ministry of Education in the educational reform as follows:

'The Ministry of Education should, therefore, progressively implement UNIP policies by providing nine years universal basic education rather than ten years compulsory basic education¹³, as recommended in the paragraphs 5 to 11 in Chapter 3. In any case, Zambian parents and their children are now clamouring for education and do not have to be compelled. As more teachers, educational facilities, financial and other resources become available, the Ministry of Education should:

- (a) more aggressively improve the quality of education and service;
- (b) eliminate regional and other inequalities in educational provision;
- (c) provide opportunity to every children of school-going age to enter Grade 1;
- (d) provide seven years full-time education for every child as a first step towards the achievement of nine years of basic education;
- (e) clear the bottle-neck at Grade 4-5 levels so that every Grade 4 pupil, as far as possible, proceeds to Grade 5 and continues to Grade 7;
- (f) progressively increase Grades 8-9 places so that, in due course, every child who completes Grade 7 shall be able to enter Grade 8 and Grade 9;
- (g) expand and provide a wider range of continuing (part-time) education programs;
- (h) facilitate the professional development of teachers and general staff of the Ministry of Education:

¹³ In the early 1970's the UNIP policies use to commit to provide compulsory basic ten years of education for every child within the decade 1974-1984. (Zambia - ER 1977, 7)

- (i) more effectively co-ordinate, on a national basis, provision of primary and secondary education to enable equal opportunity in enrolment within Regions and to facilitate Grade 7 students to proceed to Grade 8 within the same Region;
- (j) ensure that there is proper and adequate consultation in the preparation or planning of programs and their content in various stages of education;
- (k) improve the Production Units' programme introduced in educational institutions in 1975;
- (l) ensure that new buildings are simple in design, durable and constructed from much local material as possible;
- (m) encourage self-help projects by communities and ensure that educational projects shall be executed to completion;
- (n) ensure continuation of present policy that all new schools shall be built with their complement of teachers' houses.' (Zambia 1977, 97-98)

A number of studies has been analysing the *National Debate on Education* and the content of final statement the *Educational Reform* (O'Brien 1982, Alexander 1983, Draisma 1987). Conclusion of the studies is that during the *National Debate* and in the preliminary draft document *Education for Development* were introduced a number of revolutionary type solutions to improve the state of poorest rural people, but these recommendations did never end up in the final statement. The studies claim that the suggestions introduced during the debate were interpreted in final discussions as unrealisable and inappropriate to the country. Thus the final policy, the result of the educational debate represents the interest of the elite, middle class and urban centre groups who had an interest in retaining the status quo. The elite groups had a vested interest maintaining in their present form those functions of the educational system which relate to social selection and the legitimation of poverty. (O'Brien 1982, 229; Draisma 1987, 512; Alexander 1983, 203)

The conception of equality of educational opportunity presented in the *Educational Reform - Proposals and Recommendations 1977* statement can be interpreted to be rather conservative, with only a few suggestions which can be interpreted to be liberal or radical. The conservative quality of the statement can be interpreted from the unwillingness to raise up the question of equality of education in the statement. The statement is more willing to maintain the existing situation by ignoring the question.

The statement deals a lot with the question of increasing places to achieve nine years of universal basic education, but do not justify the policy with questions of equality. The aim to provide education for all can be interpreted to be short of 'national de facto' in the spirit of Humanism. This can be interpreted to be in connection to liberal conceptions of equality of educational opportunity.

Few ideas and proposals presented in the statement can also be interpreted to be radical. These are the willingness to emphasize the role of continuing adult education and special education. The statement, however, does not particularly

focus to general unfair social opportunities or cultural differences between the poor and elite groups.

6.3.2. Focus on Learning 1992

Focus on Learning - Strategies for Development of School Education in Zambia 1992 is an extensive study of education in Zambia. It contains a lot of data and evaluation of the educational system since 1960's and explains the development of education sector in Zambia. The statement covers the context of education in Zambia from different aspects, such as the nature of Zambian society, the role of education, quantitative and qualitative development of education, and finance and adjustment policies affecting on education. However, more than an introduction to education in Zambia the *Focus on Learning* is a policy statement, which lists a number of priorities and strategies in education.

The statement deals primarily with formal basic and secondary education. The main policy objectives are introduced in the beginning of the statement under the titles: *Strategies for the Development of School Education* and *Priorities in the Delivery of School Education*. Later the document focuses more exactly on different areas of education, such as (1.) expansion of primary education, (2.) curriculum and learning materials, (3.) examinations, (4.) finance of education, (5.) secondary and basic schools, (6.) students and staff of the educational system, (7.) teacher training, (8.) organization and management, (9.) participation of communities and the private sector, (10.) nonformal education and (11.) donor support for education.

In those parts introducing the policy objectives, the statement underlines that 'the basic national policy in the education sector is to provide every eligible child with good quality education in Grades 1-7.' (Zambia 1992, 15) This way the ambitious policy of nine year universal basic education introduced in *Educational Reform - Proposals and Recommendations* statement in 1977 has changed to be an aim to offer seven year quality primary education for every children. To reach this objectives the statement underlines several matters as follows:

- ensuring that focus in all schools is on learning,
- physically expanding primary schools and rehabilitating existing ones,
- developing books for primary schools and equipping schools with these books and educational material,
- reforming the secondary selection examination so that it will better serve educational objectives,
- taking care that under-nourished, handicapped and other disadvantaged children will be able to profit from school education,
- improving the quality of teacher education, developing in-service teacher education and increasing the number of trained teachers,
- strengthening the organization and management of the education system,

- enabling the inspectors to carry out in an effective way its school-monitoring and quality-control functions. (Zambia 1992, 3)

In general the statement emphasizes that the necessary human, material and financial resources should be provided for the physical expansion, development and rehabilitation of primary schools and teacher training colleges. Emphasis has been put on schools as being institutions where students are supposed to learn and teachers are supposed to teach. (Zambia 1992, 16)

The statement pays a lot of attention to finance of education. About the priorities of financing education, the *Focus on Learning* statement presents that all new resources should be invested on primary education. This means in practice that all ongoing projects should be completed, but any new project should not be initiated at other levels than primary and teacher education. The statement indicates the limits of national financial resources on education and recommends several cost-sharing measures. (Zambia 1992, xii - xiii)

The *Focus on Learning* statement's straightforward proposal to give priority to primary education, can be interpreted as an argumentation related to the question of equality of educational opportunity. The *Focus on Learning* statement is reasoning the proposal by referring to the existing political commitment to social equity and human rights. Furthermore the statement assures that Zambia's economic future is dependent on its people's capacity to acquire, adapt and advance knowledge. (Zambia 1992, 5)

Also the statement's focus on primary school curriculum can be interpreted to include ideological thoughts of educational equality. The statement criticizes the top-down development of curriculum, which does not appropriate input from the communities whose needs it should serve. The statement argues that the uniform curriculum is too rigid and does not respond to the different local circumstances. One of the most problematic forms of the uniform curriculum is the obligation of using English in primary education. The statement sees the flexibility of the curriculum as a way to improve the quality of education. (Zambia 1992, 27-28)

The new curriculum of the primary school should focus on five core areas of language, mathematics, science, health science, and social science; foster abilities in self-experience, independent thinking and problem-solving; incorporate such areas of knowledge as life- and entrepreneurial skills; involve the participation of communities in the development of a curriculum; and establish the main local language as the basic language of instruction in Grades 1-4. (Zambia 1992, 30)

The *Focus on Learning* statement's argumentation related to the question of equality of educational opportunity is based on human rights, social equity and cultural differences between the communities of Zambia. Furthermore the statement is referring to economics, by assuring that the investments to primary education are crucial for the general development of the national economy.

The demand to contextualize the curriculum to the every day life of the local communities can be seen as a radical conception of equality of education. The

education should help local communities to solve their problems. The reason why it has not helped in this process before has not been a lack of pupils' inborn ability or resources, but the curriculum's irrelevancy to them.

6.3.3. Educating Our Future 1996

Educating Our Future - National Policy in Education 1996, The third over-all education policy statement of the Governments of Zambia, is a wide introduction to education in Zambia. The statement addresses the entire field of formal education. The statement consists of 16 chapters, which covers several sub-sectors of education, teaching profession and teacher education, organisational framework and the finance of education. In the end of each chapter, the statement presents lists of policy issues and strategies to meet the matters introduced.

The *Educating Our Future* statement's catchwords are democratization, decentralizations and productivity. On the other hand the statement pays particular attention to curriculum relevance and diversification, efficiency and cost-effective management, capacity building, cost sharing, and revitalized partnership. Also flexibility, pluralism, responsiveness to needs and quality of education are recurrent themes of the statement. (Zambia 1996, viii)

Like the earlier policy statement of the Government of Zambia, also the *Educating Our Future* statement presents a new structure of the education system. The statement states that the 'fundamental units in Zambia's new educational system are basic schools, running from grade 1 to 9, and high schools from grade 10 to 12.' (Zambia 1996, xi) Therefore the educational system introduced in the statement is a 9-3-4 structure. According to the statement Grades 1-4 will be known as 'Lower Basic', Grades 5-7 as 'Middle School' and Grades 8-9 as 'Upper Basic'. The main goal of the statement is that every child should have access to nine year basic education. According to the statement the goal will be attained by ensuring that every 7-13 year-old child will have access to Grade 1-7 education till the year 2005 and that each year an increasing number of pupils will proceed from Grade 7 to Grade 8 and 9, so that the universal nine year basic education will be attained in the year 2015. The statement presumes that in the meantime the Ministry of education should focus on rehabilitating existing schools, increasing the number of school places in all levels (lower, middle and upper) of basic education and improving the quality of educational provision at all levels. (Zambia 1996, xi)

The *Educating Our Future* statement does not present as clear 'lists of priority areas' as the earlier statements of the Government of Zambia. The policy recommendations and strategies in the end of every chapter are very general. The statement presents that the *Educating Our Future* document is only introducing the basis on which the future separate implementation and strategic plans of actual priority activities, financial resources requirements, time frames and the major actors involved, will be produced. (Zambia 1996, viii-ix,)

The *Educating Our Future* statement present several reasons to emphasize equality of educational opportunity. The main argument is based on general human and civil right for education, on which the government is committed. The education is seen as an important factor in development of individuals as well as in the development of social and economic welfare of the society. The education is seen as a productive investment. (Zambia 1996, 2-3)

The equality of educational opportunity is dealt in more specific way in the sections concerning curriculum and aims of the education, needs of special groups and access to higher level of education. Same way as the earlier statement of 1992 the *Educating Our Future* statement pays attention to the relevance of the curriculum in the basic level of education. The statement supports integration of school subject to be relevant to the pupils environment and recommend learning through inquiry, discovery and problem-solving. (Zambia 1996, xiii and 33-34) This can be interpreted to be an effort to narrow the gap of differences between the culture and tradition of school and culture and tradition of local communities. The ideological thinking behind the idea is the same as in the *Focus on Learning* 1992 statement; the main problem is not a lack of pupils' inborn intelligence, but the curriculum's irrelevancy to them.

In the section of concerning the high school curriculum the *Educating Our Future* statement is considering the proportion of academic studies to practical studies. The statement argues that general academic subjects are more popular and prestigious with pupils, with parents, with teacher and with educational managers and administrators. To strength the vocational dimension within the high school pupils. the statement proposes special schools for technology, practical areas, business, and the creative arts. The first priority, however, is to improve the teaching and learning of such academic subjects as mathematics and science. In the level of high school education the statement do not consider the possibility to integrate the academic subjects with practical or vocational subjects. (Zambia 1996, 53-56)

The *Educating Our Future* statement puts a lot of stress on gender in education, special education, and needs of the poor and vulnerable. The statement is presenting its concern of gender disparities within the educational sector and promoting access plans for fostering girls' access to and performance in schools in general, and in science and technology courses in particular. (Zambia 1996, xv and 65) To full fill the need of special groups is presented as another important issues to strengthen the equality of educational policy (Zambia 1996, 67). The statement does not explain why the gender and special groups are important. It can be interpreted to be de facto which does not need any reasoning. The section dealing with the education of poor and vulnerable, however, does include some reasoning why the special attention is reasonable. Education is seen as an effective mean in poverty alleviation. (Zambia 1996, xvi). The statement recognizes the differences between the culture of the local communities and schools' 'academic world of literacy and numeracy' (Zambia 1996, 71). The statement is, however, not willing to change the culture of school education to meet better the culture of poverty. When considering poor the statement does not

see the poor performance at schools as a result of culture and circle of poverty and unfair social opportunities.

Furthermore, the statement indicates that the share of students in higher education coming from poor socio-economic background is very slight (Zambia 1996, 93). The statement, however, do not present any aims to improve the situation and the suggested policy to share the finance of higher education between the Government, the institutions and the students (Zambia 1996, 104) does not help the situation of poor students.

It can be interpreted that the *Educating Our Future* statement is basing on radical and conservative conception of equality of educational opportunity. Some arguments demanding more relative basic school curriculum from the bases of the local communities' needs can be interpreted to be based on radical conception of educational equality, whereas a number of plans to develop the higher education are at least partly basing on conservative conception of education ideology.

Into the following table (6.2.) all the education policy statements of the Governments of Zambia has been categories by the conception of equality of education.

TABLE 6.2. CONCEPTIONS OF EQUALITY OF EDUCATIONAL OPPORTUNITY IN THE EDUCATION POLICY STATEMENTS OF THE GOVERNMENTS OF ZAMBIA

Radical			
Liberal			
Conservative			
	Educational Reform 1977	Focus on Learning 1992	Educating Our Future 1996

■ = major ■ = minor

The table illustrates the changing conception of equality of education in the education policy statement of the Government's of Zambia. The first overall educational statement of the first Government of Zambia was interpreted to be rather conservative with some ideas interpreted to be liberal. The second education policy statement, written by a working group of researcher and government official, and approved by the second Government of Zambia was interpreted to be basing mostly on radical conception of equality of education. The third overall statement was interpreted to contain some elements from the

conservative conceptions and radical conception of equality of educational opportunity.

6.4. The Author and the Audience of the Statements

According to Michel Foucault, to speak is, above all, to possess the power to speak (ref. Harari 1979, 43). In the policy statements design process different point of views of different interest groups struggle for power. Thus, the national and international policy statements can be interpreted as a result or rudiment of all different point of views. The final policy statement can also be seen as a battlefield, where the winners are blustering and the losers are hiding. What the winners win is to possess the power to speak - to write a policy statement.

The analyse of author and audience of policy statements may give a new perspective to a power structures behind policy statements formulation process. The analyse is useful if politics is seen as an ongoing conflict between different interest group. The policy statement's one dimension is to express the author's policy opposed to another political actors' policy or to form an alliance with some actors. This means that when the policy statement presents some specific point of view it is relevant to ask to whom this point of view is opposing and whom it is supporting. Only seldom the statement itself is giving any straight answers to these questions. Thus, the statements' authors and audiences connection to each other and to other political actors has to been analyzed from a political context where the statement has been written. (Palonen 1988, 30)

All policy statement includes rhetoric structures where the authors are pleading, convincing are converting other actors, which constitutes the audience of the statement. From this point of view, policy statement is never only a textual structure, but it includes different actors and persons. To understand the rhetoric structures we need to know who is pleading, convincing and converting who, or at least who are taking part in the debate. The definition of author and audience can reconstruct the statement in new useful way, too. (Palonen 1988, 40)

The methodological approach in the analyses of the author and the audience is based on Perelman's and Olbrechts-Tyteca's theory of argumentation. The theory simply defines the audience of argument, as a subject of whom the author want's to present thesis for the purpose to inducing or increasing their adherence. The audience of argument can be a single individual, a group of individuals, the author itself or anyone undefined reader or listener who is able to understand the arguments presented. Undefined group of readers and listeners are called a universal audience. The opposite the universal audience is a specific audience. (Perelman 1969, 19)

To present arguments to universal audience is different, than to state arguments to specific audience. With the specific audience the author knows of which kind of expectations and interests the audience holds and may base the arguments on those. With the universal audience the author must appeal to such backing of which he or she believes that are acceptable by all human being. The arguments presented for universal audience are mostly impressive and reasonable, when

arguments for specific audience can be more persuade by appealing to interests and tendency of the audience. (Perelman 1969, Summa 1996, 67-68)

According to above it is reasonable to present how the terms audience and author will be used in this study. The term explicit author is used to refer to the institution responsible for the policy statements, and the individuals who have actually wrote the statements for the institution they present. The term explicit audience is used to refer to the people, groups and institutions to whom the statement has been primary written and expressed by an explicit author of the statement. Thus the term explicit audience includes only those people, groups and institutions, which has been factually and explicitly mentioned in the statement as the audience of the statement. An explicit audience may also include an explicit author itself.

Two new terms near the previous has been formed to clarify the author and audience structure behind the statements. The terms implicit audience and implicit author are used to refer to such political actors, who do not factually and explicitly present in the written policy statements as an audience or an author, but are interested in and commenting on the statements. An implicit audience may turn to be an explicit audience and if the implicit audience is able to effect on the statements it may also turn to be an implicit author or in some case even an explicit author. As implicit audience and implicit author do not exist actually in the statements, they can be analyzed only by considering the political context where the statements were written.

As design of a policy statement is concern as an ongoing process, where latest statement is a comment to and a new formulation of the earlier statements, the interaction between an explicit author and an implicit audience is remarkable function in the statement formulation. This means that an explicit author may recognise implicit audiences, take them into account and even give some of them and position of being an implicit author of new statement. Thus, by analyzing audience and author of the statements, both an explicit and an implicit, the phenomenon of politics can be reach.

6.4.1. The Author and the Audience of the Statements of the World Bank

The World Bank statements are prepared by the staff of the World Bank or especially for this function employed group of people, which has been selected as specialists of the issue. During the formulation of the statement the specialists are working in the Education and Social Policy Department. All education policy statements of the World Bank, however, do not name the actual writes of the documents. Administratively the group is working under the Bank's Board of Executive Directors. Thus the explicit author of the statements can interpreted to be the World Bank's Executive Directors.

Education in Sub-Saharan Africa, published in 1988, includes a announcement in the inner cover, which notes that 'the judgements expressed in this study do not necessarily reflect the views of the World Bank's Board of Executive Directors or of the governments that they represent' (World Bank 1988). On the other hand,

however, almost all statements of 1980's and 1990's states that the statement has been discussed by the World Bank's Board of Executive Directors (World Bank 1980, 2; World Bank 1988, xii). Also the facts that the statements are used in the World Bank to direct their operation in education sector and that they have been made public under the title 'Policy Papers' can be concern as and acceptance of the World Bank's Board of Executive Directors. For these reasons, in spite of the Executive Directors modesty, it can be claimed that the statement presents the World Bank's official opinion on education.

The first explicit audience and the most important audience of the World Bank's education statements, according the statements itself, is the World Bank's own staff. All overall statements emphasizes it's importance for the 'future conduct of operation in this sector' (World Bank 1971, 3; World Bank 1974, ii; World Bank 1980, 7; World Bank 1988, vii). Also the three more specific documents concerning with primary education, vocational and technical education and training, and higher education presents recommendations and implications for the World Bank (World Bank - Policy Paper 1990, 50-53; World Bank - Policy Paper 1991 64-70; World Bank - Development in Practice 1994, 79-90).

In the first overall educational policy statement of the World Bank, the Education Sector Working Paper 1971, the only clearly defined audience is the Bank's own staff and management. Another mentioned audience of the first World Bank statement is generally people interested in education. The statement also presents that the publication of the statement is justified by rising interest in the issue beyond the Bank. (World Bank 1971, 3) The staff of the Bank, mentioned as an audience of the statement, can be found also from all the other overall statements of the World Bank (World Bank 1974, ii; World Bank 1980, 7; World Bank 1988 vi; World Bank - Policy Paper 1990, 9; World Bank - Policy Paper 1991 5; World Bank - Development in Practice 1994, vii). The firsts explicit audience of the World Bank statements is the explicit author of the statements: the World Bank itself - the staff and the management of the Bank.

The second explicit audiences mentioned in the World Bank's statements are those member states, borrowing from the Bank, whereas **the third explicit audience** is the states financing the World Bank - the donor countries. The importance of donor governments as an audience of the statements has increased since 1970's. When the first Working Papers are only asking other donors to work together with the issue (World Bank 1971, 3) the 1988 statement defines the international donor community as an essential object of the statement (World Bank 1988, 6).

From the early 1970 to late 1980's the donor community has turn from the position of being the implicit audience to be the explicit audience of the World Bank's policy statements. In time the donor member states has also become the implicit author of the statements, as the World Bank has been willing to take them into account already during the policy design process (World Bank 1995b, 10). Naturally, however, the donor governments has always took part in the policy formulation from the official position of being members of the Bank's staff and the

Board of Executive Directors, too. The change of donor states from position of being the implicit audience of the statement to become the implicit author has happen same time as the World Bank's action and significance in education sector has increased compared to other donor agencies' action.

The borrower governments importance as the audience of the statements has also increased in last thirty years, too. In the Education in Sub-Saharan Africa (1988) statement's forewords the president of the World Bank, Barber B. Conable, describes the audience of the statement, as follow:

'This study will guide the World Bank's lending and technical assistance to Sub-Saharan African education over the next several years. I should serve to provide a common ground for other donors as well, to expand their assistance to education in Africa, and to increase the effectiveness of international assistance for this purpose. But most important, we hope this study will provide insights for our member governments in Africa as they develop their own country-specific plans for education reform, revitalization, and expansion.' (World Bank 1988, 6)

Also the latest 1995 statement, the Priorities and Strategies, emphasizes the developing countries' policy makers importance as an audience of the statement. In the 1995's statement the essential audiences - the staff and the developing member countries - are introduced in reverse order compared to earlier statements of the Bank (World Bank 1995b. When the earlier statements of 1970's and 1980's presents the Bank's staff as the prior audience of the statements (World Bank 1971, 3; World Bank 1980, 11), the 1995 statement presents its audience so that it is firstly designed to assist policy makers of developing countries. Especially those working with the education system as a whole and only secondly to the World Bank's staff who are interacting with these policy makers as the Bank supports it's developing member countries (World Bank 1995b, 9-10). The 1995 statements also emphasize that it is design to assist especially those working with the national budget in the developing countries. (World Bank 1995b, 9)

The late 1980's and early 1990's puts a lot of stress on the developing countries - the governments, the authorities and the policy makers - to take into account the World Bank's statements. This can be explained by the general increased importance of education sector, both ideological and economical, in the development cooperation and operation of the Bank in last thirdly years. The reason why the World Bank in the 1995 statements emphasizes the role of 'those concerned with the allocation of public resources to education', can be interpret to be related with the Bank's general change in its lending policy from the project lending to program lending (World Bank 1995). The Bank is nowadays more interested in structural adjustment, than financing single projects on education.

The fourth audience of the World Bank statements is the international community beyond the Bank: international organizations, donor agencies and academics dealing with education and development. The first and the second World Bank's Education Sector Working Papers in 1971 and 1974 do not mention any international seminars or meeting held during the policy documents'

design process. Thus in the early documents the international community outside the World Bank's headquarters can interpret to had none or only very little non-formal role in the policy design process. In 1970's the international community was mostly held among the implicit audience, without having position of being author, an explicit or an implicit. From international organizations only UNESCO has been playing important role already in the 1970's statements, which can be understood by it's long standing tight cooperation with the World Bank in education sector already since early 1960's (Jones, 1992, 46).

In 1980's and 1990's statements the research community beyond the Bank is more clearly mentioned as an important assistant in the statement creation process. The statement states as follow: 'In addition, the Bank sought information and ideas from the professional community, through personal contacts, research reports, state-of-the-art papers and seminars, and from other organizations concerned with education and development...' (World Bank 1980, 11). Also in the 1995 statements' design process the World Bank has arranged a number of international meetings and panels with ministers, senior officials and academics from developing countries and with other donor agencies and international organizations, such as OECD, UNESCO and UNICEF (World Bank 1995b, 10).

Since 1988 the World Bank and several other donor agencies have organize meetings to design their aid to education -policies for African countries. The Donors to African Education consortium (named afterwards the Association for the Development of Education in Africa) has meet regularly to discuss and shape the donor's aid policies. (Takala 1998, 320) It can be supposed that in these meetings of donor agencies also the World Bank policies has been discussed and shaped already during the formulation process of the policy statements.

The role of the international aid community - aid organizations, donor agencies and academics - can be located to the position of being the implicit audience and implicit author. In its education policy statements the World Bank do not give specific named credit to any other organizations, agencies or academics, but present that they have took part in the formulation process of the statement.

The fifth audience of the World Bank statements can be interpreted to be the international monetary market from where the Bank is borrowing money. The statements don't mention the market as an audience, but by the fact that the Bank's capacity to lend is contingent on its capacity to borrow from the monetary market, it is easily understood that the markets are playing some kind of role in the World Bank policy formulation (Jones 1992, 3). Even that the education policy statements are made for the use of IBRD and IDA, which are not lending money in market prices, it is quite clear that also these loans productivity are observed by the markets and thus -at least partly- formulating the image of the World Bank's responsibility and reliability. Because the education policy statements do not mention the international monetary market, as an audience or author of the statements the monetary markets can be located as the implicit audience.

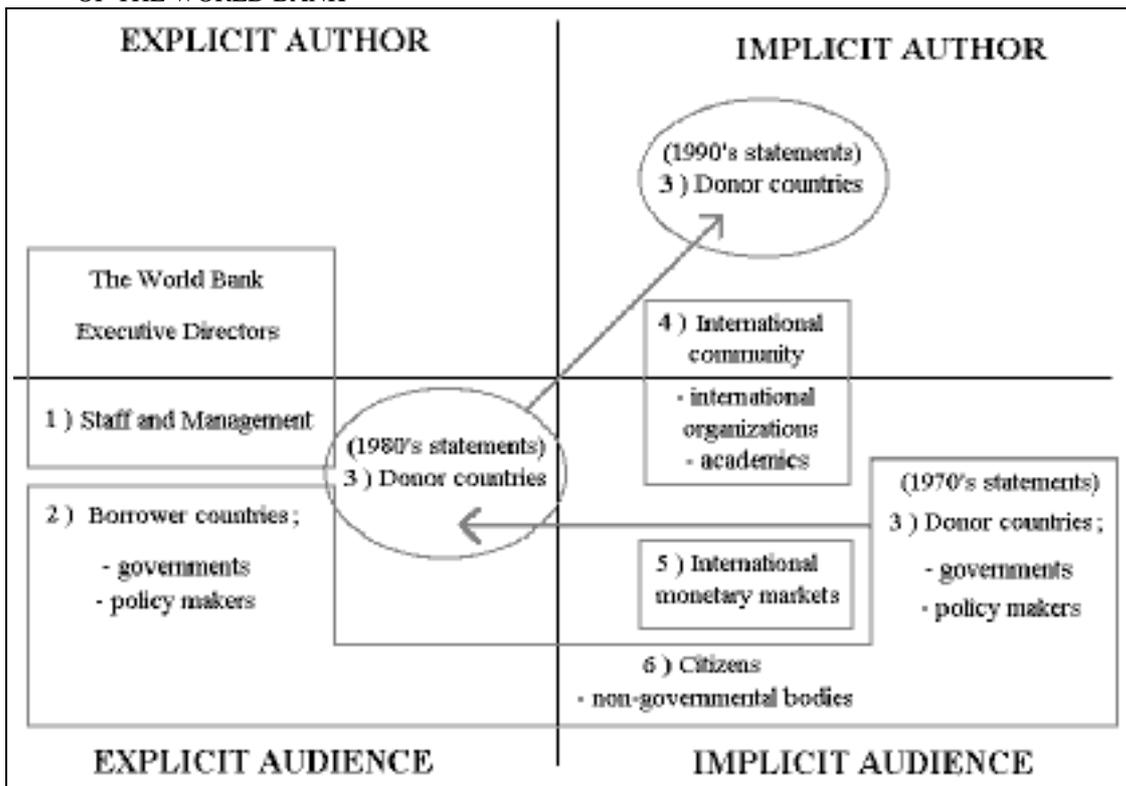
The sixth audience, obviously in a position of being the implicit audience, is the citizens of the World Bank member countries: both the citizens of the borrowing

countries and the citizens in the donor countries. All non-governmental bodies, such as non-governmental mass media, social movements, non-governmental organizations, parties, religion bodies, communities, etc can be include into the group of citizens too. The interest of non-governmental bodies to watch over the World Bank's statements and action are naturally various. In some cases, however, the explicit author of the statements may recognize the non-governmental bodies as an implicit audience, even that it does not give them a position of being an explicit audience. The democratic member governments sensitiveness to recognize the non-governmental bodies of their countries as an audience of the governments activities is naturally much greater than the World Banks.

The structure of author and audience and their proportion to each other can be represented as has been done in the figure 6.1. The figure clarifies the order of precedence of different audiences. From 1970's to 1990 the donor countries has changed their position of being in a first place an implicit audience (1970's), then an explicit audience (1980) and finally ended up to be an implicit author (1990) of the World Bank's education policy statements. The figure is also trying to sort out the different actors importance in the design process of the World Bank statements at different times.

Connection between the World Bank policy statements formulation process and the formulation process of the Governments of Zambia's statements can be recognized from the figure, as well. The Government of Zambia, borrower member state of the World Bank, is defined by the Bank as the principal audience of their statements. Specially the latest 1995 statement emphasis the education policy makers of low-and middle-income member countries role as to be an audience of the statement (World Bank 1995b, 9).

FIGURE 6.1. THE AUTHOR AND THE AUDIENCE OF THE EDUCATION POLICY STATEMENTS OF THE WORLD BANK



My own position in the audience and the author structure of the World Bank policy statements can be located in the group of donor member state citizens. As a citizen of a member country of the World Bank, I am keeping watch over my own governments commitments and action in the international cooperation. The World Bank's member countries citizens' position as an audience is implicit. The World Bank is an inter-governmental organization and the citizens' possibility to influence on the World Bank can mostly happen only through the national governments.

The position of member government's citizen in the implicit audience is a justification to study, interpret and comment the statements of the World Bank. At the same time the citizen is naturally trying to aspire better position in the power structure - to get a position of leaving marks on the policy statements. This notice leads to comprehend that the interpretation of policy, the study method used in this study, is rather similar and near the phenomenon of politics. The interpretation of policy can also be understood as a fragment of politics (Palonen 1988, 18). Thus the interpreter, the researcher, is somehow also a political actor in the policy design process with own interests and ideological impressions. This should be noticed by the researcher itself but also by the interpreter of the interpretation - by the audience of the study.

6.4.2. The Author and the Audience of the Statements of the Governments of Zambia

The three education policy statements of the Governments of Zambia have been prepared by the staff of the Ministry of Education. All them have been acknowledged by the Government. The four National Development Plans have been prepared by the Office of National Development. Also them has been acknowledge by the Government of the time. Thus, the explicit author of all national education policy statement of Zambia can be determined to be the Government.

The policy formulation process of the statements has changed in different times. The first national education policy, the Educational Reform in 1977, was a result of officially arranged National Debated launched by the President Kenneth Kaunda on 1976, and which lasted for six months. Before the National Debate the Government and the Party set up a study group which visited in number of countries and prepared a number of reports for the use of the Party and the government. With the help of the preparatory group, the Party and the government designed the Draft Statement of Educational Reform. Summaries of the Draft Statement were also prepared in local languages and about 40 000 copies were distributed throughout the country, to missions abroad and to other agencies. In each province the Members of the Central Committee were responsible of the organization and conduct of the debate. In each provinces and district all educational institutions, Ministries, churches, trade unions, voluntary associations and other public bodies were requested to organize discussions among their members and to prepare comments. Also the newspapers, television and radio serialized and reported about the Draft Statement and provided a public forum for discussion. During the period of the national debate the Ministry of Education received about 1500 written comments from individuals, schools and educational institutions, associations and various groups from all over the country. Finally the Ministry of Education prepared and introduced the final statement of Education Reform for submission of the Party and the government. (Zambia 1977, 1-3)

The second over all education policy statement of the governments of Zambia in 1992 was prepared by a Education Strategy Review Team under supervision of a Task Force on Education for All. The Review Team was found as a result of the World Conference on Education for all held in Jomtien and the National Conference on Education for All held in 1991 in Zambia. In 1992 the Review Team consisted of specialists of the issue, but the statement don't name the members. In 1991 the Team introduced the draft version of the statement for a number of senior educationists from public and private sector and to representatives of the donor agencies. After the seminar the Task force finalized the statement in 1992. (Zambia 1992, 2-3) The new government, (took-over in November 1991) examined the Focus on Learning statement and decided to acknowledge it as official policy on education in Zambia in 1992 (Zambia 1992,

1¹⁴). Remarkable in the policy formulation process of the Focus on Learning statement is that it was prepared, at least formally, under the supervision of the old UNIP government, but acknowledged by the new MMB government.

The third education policy statement of Zambia was introduced in 1996. The Educating Our Future - National Policy on Education statement was prepared by the Ministry of Education's own personnel. The statement states that personnel from other government ministries, as well as from the teacher profession and the universities, communities and aid donors has participate on the policy formulation and ensured that the statement is widely representative. The education policy formulation process, the Ministry of Education's collaboration with other stakeholders is called as a length and broad consultation process. (Zambia 1996, viii) In his forewords the Minister of Education A. S. Hambayi, M. P., emphasizes that the statement is more a product of broad-based consultation and research than partisan (Zambia 1996, vi)

The first explicit audience of the education policy statements of the governments of Zambia is naturally the Ministry of Education and all other governmental bodies working in the field of education. The Ministry of Education is also the explicit author of the statements. In the first place the target of the statement is on the governments own activities. (Zambia 1977, Zambia 1992, Zambia 1996) It can be specified that the statements first explicit audience is the government, the explicit authority itself.

The second explicit audience of the statements is the national non-governmental bodies working in the educational sector of Zambia. When the first over-all statement, the Educational Reform, mentions such 'agencies of education' on which the statement is proposed as families, religious bodies, mass media and the Party. (Zambia 1977, 2-3) The latest statement, the Educating our Future, states that 'non-governmental sector have a vital role to play in 'Educating our Future' and that the statement 'will serve as a useful reference for their guidance and informance' (Zambia 1996, vii). The Educational Reform includes also a chapter of two and half pages named 'The Role of Non-Governmental Agencies in Education' (Zambia 1977, 77-79).

The Educational Reform statement emphasizes the non-governmental bodies importance for the policy formulation process. The 40 000 copies of draft statement and 1500 written comments from different non-governmental bodies are introduced in the statement as an assertion of citizens participation into the policy formulation process. As the policy design process continued still after the National Debate almost two years out of publicity, inside the ruling Party, it can be doubt that the non-governmental bodies impact on the final statement has not been that great as it is stated in the final statement. (Zambia 1977)

In Zambia, like in many other developing countries, the role of non-governmental bodies in the provision of formally governmental services, such as education and

¹⁴ Foreword in the Focus on Learning statement by Arthur Wine, M. P., Minister of Education.

health services, is remarkable. For instance, in Zambia the government is dependent on non-governmental bodies and communities willingness to provide educational services (Zambia 1995, 164). When the government is sharing its responsibility and costs with non-governmental bodies it should same time be able to share its power to the bodies taking part in to provision of governmental services. In the policy design process it would mean that the non-governmental bodies and communities could have an active role - to occur at least an implicit author of the statements. In the educational policy statements of the Governments of Zambia, except the Educational Reform of 1977, the non-governmental agencies are located to a position of being the explicit audience of the statements.

The third explicit audience of the educational policy statements of the governments of Zambia is the external donor states and organizations supporting and acting in the education sector. Explicit references to donors and friendly states willing to help Zambia have been included to the Focus on Learning and the Educating our Future statements (Zambia 1992, i and 126-135; Zambia 1996, 167). The first education policy statement, the Educational Reform, does not refer to any international donor agencies or to donor governments, whereas the Focus on Learning dedicates a whole chapter to the donor agencies, named as 'Donor Support for Education' (Zambia 1992, 126-135). The notable role of donors in the Focus on Learning statement can be understood by the fact that the donors where asked to take part in the formulation of the statement. The representatives of the donors were asked to comment the draft statement during the policy design process and the World Bank gave financial support for the work of preparing and producing the statement. (Zambia 1992, ii-iii) Also the latest statement, the Educating Our Future, includes a subchapter of 'Donor Support for Education' in the chapter 'Financing the Education System' (Zambia 1996, 161 - 169).

As earlier in the policy design process of the Focus on Learning statement, also in the preparation of the Educating Our Future statement the international aid donors has been asked to take part in the policy formulation process. The statement presents that international aid donors have taken part in the consultation process and collaborate generously with the Ministry of education's own personnel (Zambia 1996, viii).

The position of international aid organizations and donor states in the education policy statements of the governments of Zambia has change in the long run. The Educational Reform does not refer to any international aid donor organizations or donor countries. Only foreign countries stated in the statement are Botswana, China, Cuba, Chana, Guyana, Nigeria, Jamaica, Kenya, Sierra Leon and Tanzania, United Kingdom and Commonwealth countries in Caribbean. To these countries the officials of the Ministry of Education were taking study tours during the policy design process. Also special education experts form Switzerland, France and Italy were consulted during the policy formulation process.

The Educational Reform statement reflects the governments belief to develop the country by itself without foreign aid. Thus the statement don't include foreign aid

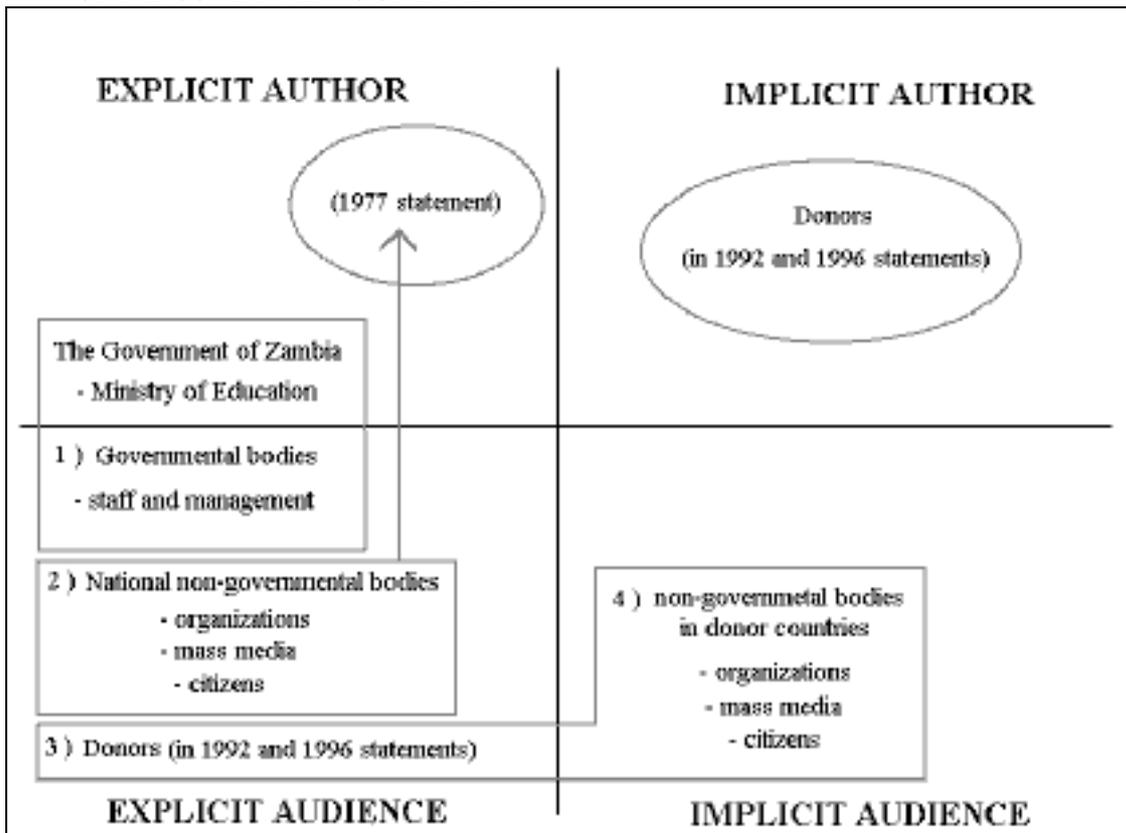
organizations and donors to the audience. The faith on the 'Educational Reform' last all the way to the end of the 1980's. Still in 1989 the Fourth National Development Plan, named as the New Economic Recovery Program for the period of 1989-1993 states that the period of the Plan 'will provide another opportunity for concerted efforts in implementation of the Educational Reforms' (Zambia - NDP 1989, 308).

In the formulation of the Focus on Learning, in 1991 and 1992, the international aid organizations and donors were already playing an important role. Their participation on the policy design was also subscribed to the statement (Zambia 1992, i-iii). It can be interpreted that the international aid donors got a position of being the explicit audience and the implicit author. The international aid donors has kept their position of being the implicit author also in the latest Educating Our Future statement in 1996 - the donors has been asked to take part in the policy formulation process (Zambia 1996, viii).

The forth audience of the statement of the governments of Zambia is the non-governmental bodies in donor states and all around the world. Many international and national non-governmental organizations are interested in to watch what kind of development in the field of education the government of Zambia is supporting. Number of non-governmental organizations are also working themselves in the education sector and the policy may have straight effects on their operation. Many citizens of donor countries are also interested in to know what kind of development their own government is supporting. The fourth audience is hardly recognized by the author, the government of Zambia, but certainly recognized by the implicit author, the donor government operating in Zambia.

The structure of author and audience and their proportion to each other in the education policy statements of governments of Zambia has been represented in the figure 6.2. The figure describes the order of precedence of different audience. The figure reveals the connection between the policy formulation process of the governments of Zambia and the World Bank. Since 1992, The World Bank, the largest single international aid donor in the education sector, has been determined as an explicit audience of the national education policy statement of Zambia by the explicit author of the statement, the government of Zambia.

FIGURE 6.2. THE AUTHOR AND THE AUDIENCE OF THE EDUCATION POLICY STATEMENTS OF THE GOVERNMENTS OF ZAMBIA



My own position in the audience and the author structure of the policy statements of the governments of Zambia can be located under the donor states. As a citizen of the country which is financing international aid donor organizations and also operating as a donor in the educational sector of Zambia, I am entitled to keep watch over my own governments commitments and operation in the international setting. The donor countries citizens' position as an audience of education policy statement of Zambia is only implicit and hardly recognized by the explicit author, the government of Zambia. The citizens position of being an implicit audience, however, may somehow be recognized by another implicit author - the citizens' own donor government. The position of being in the implicit audience is also a justification to study and comment the statements of the governments of Zambia.

6.4.3. The Changing Author and the Audience of the Statements

The explicit author of the statements, the World Bank's Executive Directors and the Government of Zambia, formally responsible for them, have encountered new 'authors' who aspire to get a position next to the explicit author. In Zambia the donor agencies, included the World Bank, have took steady position of being the implicit author of the policy statements, whereas the World Bank has been constrained to let the member governments, both developing and donors, to take part in their policy formulation process trough seminars and meetings (Zambia 1996, World Bank 1995b). During the early 1990's, under the huge burden of

national debt, the Government of Zambia has been required to hand over its power to the lenders - the donors. While at the same time the World Bank has reach a leading role in the education sector's developing cooperation and has been willing to divide its responsibility with other donor agencies.

Also the audience of the statements has changed in a long run. The World Bank's first education policy statement's explicit audience was the staff and the management of the Bank (World Bank 1971). Already the second statements recognized more explicit audiences, such as the international developing aid community and the developing countries (World Bank 1974). For other donor agencies the 1974 statement can be interpret to be written as a geneses to introduce the Bank's aspiration to extend its operation to a new sectors, such as education. It can be assumed that as the World Bank was willing to increase its lending on education it same time needed to introduce this new policy to the developing countries. Thus it can be interpret that the education policy statements of the World Bank has been written as a leaflets to advertise new loans available for the clients - the developing countries. The World Bank's education policy statements' role as being an informal advertisement of the Banks loans has been endured during the years.

The audience of the Government of Zambia's education policy statement has change, too. The first statement, the Educational Reform, in 1977 did not recognize any aid donor agencies as an audience of the statement, whereas the latest statements, the Focus on Learning in 1992 and the Educating Our Future in 1996, refers to the aid community in various connection (Zambia 1992; Zambia 1996). In the 1970's when Zambia was still a middle-income country the aid donors role was not that notable for the national economy in general and for the education sector in practical. The government of Zambia's thigh relation to aid donors can be interpreted from the education policy statements of the 1990's. In the 1990's the donor agencies have participate in the policy formulation process and included to the explicit audience of the statements.

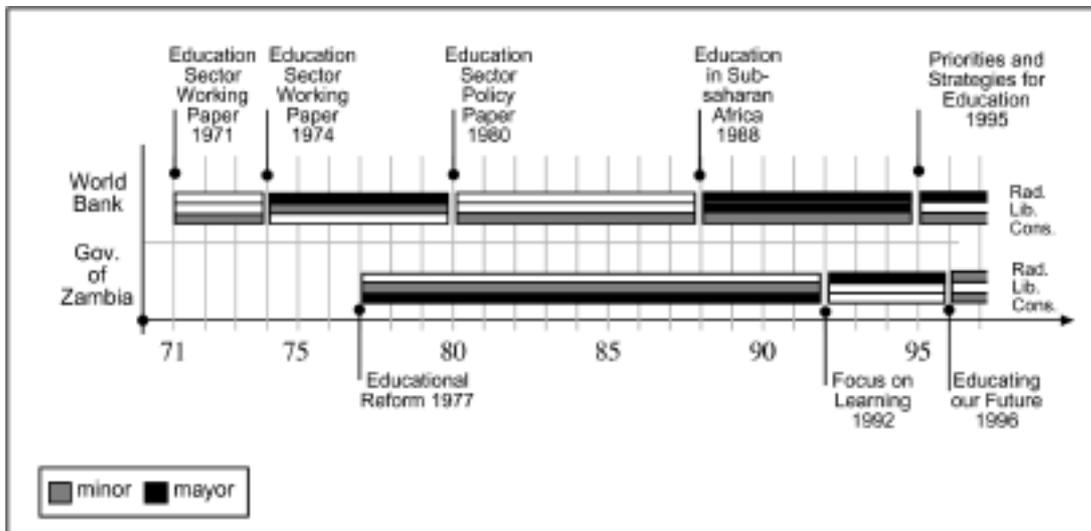
It can be interpreted that the changes in the audience of the policy statements of the Government of Zambia are related to the decline of the national economy and enlarged need of external aid and finance in the 1990's. The transition to multi-party democracy and capitalistic market based economy in the early 1990's Zambia must also been effecting on the education policy statements. To put it at its crudest, it can be claimed that the Government of Zambia and the donor agencies have found a possibility to bargain. The capitalistic and democratic aid donors are willing to support the ideology they represent and the Government of Zambia is willing to 'sell' the ideology for them. The donor countries seem to believe that democracy can be bought from the developing countries. In developing countries, however, this kind of 'democratic development' means changes only in the administrative and governmental level. The people, the *demos*, do not have any kind of role in this kind of process.

7. CONCLUSION

This study is reflective. The study is looking back into the development of global educational politics, presenting an interpretation of the development and entering into conversation. The study is about rhetoric and rhetoric itself. The main purpose has been to take part in the discussions by presenting one more analytical interpretation of the phenomenon. The general assumption is that the sequence of interpretations and arguments will lead us to understand better the area under consideration.

In the course of time, the conception of equality of education and the author and the audience of the statements of the World Bank and the Governments of Zambia have change. The following figure (Figure 7.1) show the changes in one timeline.

FIGURE 7.1. CONCEPTIONS OF EQUALITY OF EDUCATIONAL OPPORTUNITY IN THE EDUCATION POLICY STATEMENTS OF THE WORLD BANK AND THE GOVERNMENTS OF ZAMBIA



The statements of the World Bank have been relative conservative in early 1970's and in 1980, but mostly radical in late 1970's and early 1990's. The statements of the Governments of Zambia have been mostly conservative in 1980 and very radical in early 1990's. In mid 1990's the statements of both actors are confusing the conceptions of equality of educational opportunity.

It can not be proven that the documents themselves have been straightforward influencing on each other, but the analyses of the authors and the audiences of the statements show that in 1990 the roles of being the author and the audience have changed a lot.

We may interpret that the changes in the conceptions of equality of education are related to the changes in the international education policymaking process. For instance, the faint development of the World Bank documents from being rather conservative (1971, 1980), but later containing more ideas related to radical conception of equality of education (1988, 1995b) can be seen as a result of the

World Bank's more active participation in the international education policy making process in the late 1980 and the early 1990. The World Bank has learned to argue, in such a way that it is more acceptable for a wider international community, as well.

In the same period when the World Bank's documents (1988) became more radical, also the document of the Governments of Zambia (1992) started to refer more to radical ideas of equality of education than before.

Remarkable discovery of the analyses is that in the documents of the mid 1990's both actors are, in a way, lost when considering the conception of equality of educational opportunity presented in the documents. The World Bank (1995b) and the Government of Zambia (1996) are including both conservative and radical conceptions of equality of education in to their education policy documents. According to Husen's model, the conservative and radical conceptions are contrary views which are very difficult to combine if not even impossible.

Even that the World Bank and the Government of Zambia can be interpret to be illogical in their conception of equality of education, both actors are illogical in the same way. We may assume that there is connection between the illogicality and the author and audience structures of the policy making process. The World Bank's 1995 statement emphasis the education policy makers of low-and middle-income member countries, to be an audience of the statement (World Bank 1995b). In 1990's The Government of Zambia has accept the role of being audience of the World Bank policies, and the World Bank has took the place of being an implicit author of the Government of Zambia's education policy documents. The analyses of the author and the audience also show that in some level it seems to be that the World Bank and other donors are writing the education policy documents of the Government of Zambia. Oddly enough the donors are not writing the documents for the Government, or for the people of Zambia, but rather for them selves. The donors are at the same time, both the authors and the audience of the documents of the Government of Zambia. One could claim that the situation is related to the general globalization process.

The globalization is a fact and effecting on all areas of human life, including education. A clear example of this phenomena can be interpreted to be the World Bank's (1995b) and the Government of Zambia's (1996) education policy statements of the mid 1990's which are bringing up, more economical factors than the earlier statements. It is good to remember, however, that the globalization is not a law of nature. The globalization process is man-made. The policy statements of the World Bank and the Governments of Zambia in the mid 1990's do not question the globalization process. The statements actually promote the globalization process. We may wonder, is it the globalization what most of the people want?

Education, as effecting to human cognition, is one of the major agents of influence on individuals, communities and societies well being. Further research is needed on the role of education in the globalization process. How different

educational objectives and practices are defining and directing the development? Is the education policy the result of the policy making process where different actors are acting in roles of authors and audiences or could education be the framework where the policy is done? Are the students empowered to interpret, act and direct the world - be authors - or only do and adopt what is written in the education policy or in the curriculum? Education as a space for policy making could mean that everybody could take part in the policy making process. Education for All could also mean authorship for all. Authorship for all is equality.

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