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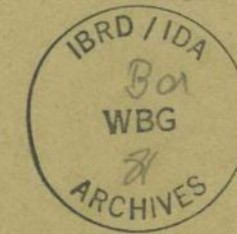
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DIEZ-Hochleitner, Ricardo - Articles and Speeches (1963-1965)

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EDUCATION AND ECONOMIC AND SOCIAL DEVELOPMENTR. Diez-Hochleitner

Today, as never before, the development of education is of primary and absolute importance to every country in the world. Many factors give the problem special urgency. Some of these are the swift and far-reaching social changes now under way, the growth of population, the requirements of developing economies and the wealth of knowledge and technology available. How to meet the various countries' individual needs calls not only for trained men in large numbers and special financial provisions, but also for new methods of teaching and education. As though this were not enough, there is the fact that, at the same time, all countries desire some degree of economic and social progress. The call for capital for economic development, to raise the living standards of the people competes with the need for extra financial resources for education. However, it is quite clear that there is a close interaction between the two requirements; while education's demands on the economy are steadily growing, the development of the economy itself necessitates a geometrical progression in the numbers of trained staff available. Experts of every kind are needed, as well as people with a good general education. This interaction, occurring in most countries in the process of social change, requires that their educational systems provide that equality of opportunity which democracy proclaims.

The complexity and urgency of this task, facing all peoples if they are to reach the economic and social development they desire, has brought planning to the forefront as the best way to organize the action required for the future.

As economic development plans have gradually expanded, they have come to reflect the need for attunement to social development, including the development of education. Conversely, those in charge of the development of education have become increasingly aware of the need to link their programmes with the economic plans in order to make them realistic and to safeguard the principles and goals of education. Thus, integration of the educational with the general plan ensures better direction of a country's long and short-term efforts to priority items, without compromising the educational needs of the individual and the society.

Educational systems take shape in response to many distinct demands from the societies that create them. Their control is shared by different levels of government, by private organizations, educators, parents, and the students themselves. This means that allocations to education and returns expected from education would not be determined

solely according to socio-economic needs, even if planners could be quite sure what these needs were.

However, from the economic point of view, it is essential to determine what priority education is to be given in the face of competing demands for scarce resources. On what basis, for example, is a certain sum to be earmarked for roads, another for schools, a third for housing, a fourth for the establishment of industry, and so on? The establishment of appropriate priority criteria is of fundamental importance to planners, and it can be rationally done only by taking into account the costs as well as the returns of given investments. Unfortunately, this introduces very considerable complexities, since education can not easily be compared to other forms of productive investment. Indeed, education is distinguished by four major peculiarities. In the first place, it is both an item of consumption and a factor of production; the former because it is valued and demanded for its own sake quite apart from its practical applications; the latter because it produces the skills, attitudes, personalities and milieu upon which modern technology and organization rests. Thus education can be anything from a luxury indulged in by the rich for prestige to specialized training without which sophisticated production methods are impossible.

A second peculiarity of education is that it yields very high indirect returns since it is aimed directly at modifying people rather than things. It is always easier to produce or replace consumer goods than it is to create the skilled manpower which makes them. Besides, education also acts to promote self-discipline, to widen horizons, to open up fresh opportunities, to create markets - in short, it lends range, flexibility and scope to society itself.

A third peculiarity of education is its highly differential cost and yield according to a country's general level of economic and social evolution. Education costs more when there must be pre-investments in teacher training, school buildings, new textbooks and so on before a given programme can be put into effect than it does when existing resources merely need to be expanded or re-deployed. Education may also yield less in societies not adequately organized to make full use of talent and training. Increasing and decreasing returns related to scale and quality, the costs related to age structure and the geographical dispersion of populations and factors dependent on discontinuities are important exogenous variables affecting the cost of and returns on education. Unfortunately, they work against the best interests of poorer countries and therefore make it all the more important for investment decisions there to be worked out with the greatest foresight.

The last distinguishing characteristic of education is that, of all the possible tools at the disposal of the reformer, it is the one most hedged about with non-objective and non-measurable considerations. Education, after all, is an integral part of a total culture; in some ways, it is the most important expression of accepted values. As such, any meddling with it is likely to arouse the strongest opposition and to be

interpreted as an attack on cherished traditions to a greater degree than other pieces of social engineering such as a drive to industrialization, an irrigation scheme or a health programme.

This being so, education hardly lends itself to the mechanistic approach, though at all levels it competes with other endeavors for attention, standing and financial support. From the purely economic point of view, projection of skilled manpower needs must serve as the basis for the efficient allocation of resources not only to the educational sector as a whole, but to its component parts also. Without projections of the types of skill likely to be in demand a decade or more ahead, and the number of trained persons who can expect to find appropriate employment, there is a considerable risk of shortages of skilled labour, or else of an oversupply of certain qualifications. Too many lawyers cannot be offset by too few engineers. Though there are countries with an absolute shortage of trained personnel, where all forms of schooling are in potential demand, the usual dilemma is that of the shortage of certain skills only. This may be accompanied by overt or disguised unemployment of those who, from the point of view of current needs, have acquired proficiency in the wrong fields. Indiscriminate investment in education can lead to human and material waste: the optimum returns are obtained through a careful analysis of trends in the economy, and the allocation of resources to key educational sectors in accordance with projected manpower needs.

Furthermore, it must be understood that education is by no means a homogenous service which can be administered only in one fashion. On the contrary, there are many possible permutations and it is always worth examining different alternatives to see which suits a given situation best.

The demand for education in the developing parts of the world is already great, and continues to grow. It is inconceivable that anything more than a handful of specialist-teachers can be supplied from abroad; the great mass of the teachers will have to be found locally in each country. Yet the shortage of teachers and facilities is already serious, and it is likely to become more so. Hence it is urgent to explore the alternatives being opened up by a veritable technological revolution currently taking place, partly in response to labour's differing capital factor endowments. A growing knowledge of the learning process is improving the content and structure of curricula and pedagogic methods and thus economizing on teaching time. Meanwhile, new methods involving television, machines, radios and so on which are being evolved, tend to modify the hitherto accepted pupil-teacher ratio. A thorough examination of the applicability of such methods together with their adaptation to each particular set of circumstance can either lower the unit cost of education or raise its efficiency, or both.

As has already been pointed out, education is both an integral part of a total culture and an item of consumption, highly valued by some for its own sake. From the social point of view, it is neither desirable nor indeed possible to regard it merely in its utilitarian guise. The question therefore arises of balancing utilitarianism against what might be described as the civilizing function of education, a question which arouses constant controversy everywhere. In some of the affluent societies it has lately been felt that too little attention is given to the humanities, and that the tendency towards ever greater specialization at an ever lower age is ultimately self-defeating, since this makes it increasingly difficult for specialists to communicate with each other. In the under-developed countries, this is still a rather remote difficulty, but decisions concerning traditional versus innovational or vocational orientation of education are immediate enough. Obviously, the traditional functions of education which are to preserve the continuity of a civilization and to help develop cultural identity cannot be neglected; on the other hand, if a break is to be made with the past, too much emphasis thereon would be a mistake. It is therefore necessary to ensure that education fits harmoniously into the pattern of change, that it is progressive enough to produce the social and technical leadership required, while at the same time not isolating those who are privileged to receive higher education from the national cultural and social heritage. People may acquire a modified outlook and new skills within one generation but they cannot be expected to readjust themselves entirely, to jump many decades of evolution which have taken place elsewhere. Educational planners are faced with the difficult task of having to be hard-headed and businesslike when they confront outsiders who may need to be convinced of the merits of their case, and sensitive and imaginative when they seek to adjust to cultural and social cross-currents.

File
Speakers (March/63)
Education

①
DECLARACIONES DEL JEFE DE LA DIVISION DE EDUCACION DEL BANCO MUNDIAL/IDA,
RICARDO DIEZ HOCHLEITNER, PARA RADIO NACIONAL DE ESPAÑA (Marzo 1963)

La decisión que acaba de tomar el Banco Mundial junto con su institución afiliada, la Agencia Internacional de Desarrollo, al crear una División de Educación, tiene a mi entender y en la medida de las cosas, el carácter de un acontecimiento de valor porque demuestra tangiblemente el cambio de los tiempos y las hondas transformaciones del momento.

Una breve mirada retrospectiva a los acontecimientos en el campo educativo durante la última década me llena hoy de nostálgicos y vibrantes recuerdos. Hace todavía menos de diez años nos parecía casi increíble la fascinante empresa del planeamiento integral de la educación, nacida por tierras hispanoamericanas, en Colombia, para dar respuesta al drama, la espera y la esperanza que para la juventud representa la educación, a fin de lograr la igualdad de oportunidades en el mañana. Pero a la educación se le había negado o postergado muchas veces los medios económicos necesarios en su esencial tarea de vehículo de la cultura y de los valores de los pueblos y de previsor, de columna vertebral del desarrollo económico y social. El financiamiento ~~de la~~ ~~educación~~ internacional o el crédito al servicio del desarrollo de la educación eran utopías hasta hace muy poco aún. Sin embargo hoy se reconoce ya que, si bien es verdad que en los gastos educativos subsiste una parte que es consumo, esos gastos constituyen también una de las inversiones más rentables y con mayor capacidad de multiplicación económica y social en el mundo moderno. Mas aún; que sin una política educativa, coordinada con lo que gustan muchos en llamar ahora la estrategia del desarrollo de los recursos humanos, es decir, el estudio y la previsión de las necesidades de mano de obra y de personal calificado para el logro de los planes de desarrollo económico y social, no se puede enfrentar seriamente el futuro de ningún país.

② La presencia de la educación en tan destacada organización internacional, cual es el Banco Mundial, representa por si misma una buena prueba del peso y acierto de estas nuevas ideas y significa reconocer a la educación su destacadísimo puesto entre los mejores instrumentos del desarrollo y como inversión multiplicadora, además de reconocérsele sus más altos e indeclinables objetivos.

El Banco y su filial la IDA quieren favorecer el desarrollo educativo y ayudar, sobre todo, a aquellos países que ya están haciendo un gran esfuerzo en favor de la enseñanza y que están llevando a cabo las necesarias reformas estructurales para que su propio impulso pueda acelerarse. De este modo, ayudando a quienes se ayudan a si mismos esperamos poder ser mas eficaces.

De hecho la IDA ya ha empezado a financiar proyectos de educación con un primer crédito a Túnez y esperamos que a éste le sigan otros muy pronto para países de diferentes regiones.

Esta financiación se hace a través de inversiones de capital en construcciones, equipos, expertos, etc., que los países no pueden afrontar si, al mismo tiempo, se ven obligados a incrementar sus gastos corrientes en razón de los aumentos de las matriculas en los diferentes niveles educativos y de los profesores adicionales que ello requiere. Nosotros tratamos los proyectos que se nos presentan para su financiación como parte del sistema educativo, de las necesidades globales de educación y entrenamiento, y atendemos aquellos que tienen prioridad suficientemente alta porque, entre varias alternativas, es preciso elegir con ánimo moral aquellos proyectos que sirvan mas al desarrollo del país. Es decir que, sin olvidar el fundamento mismo de la cultura, el Banco se inclina por la financiación de proyectos educativos estrechamente relacionados con un plan de desarrollo económico y social.

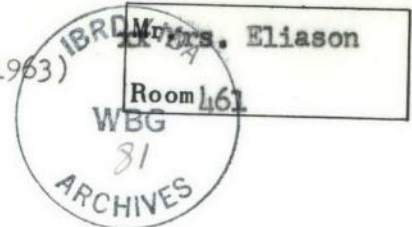
En Africa, puede decirse que la prioridad de la ayuda corresponde en general al nivel medio de la enseñanza, por mucho tiempo bastante abandonada. De ese nivel sale la gente indispensable en los países africanos para numerosas ocupaciones. Casi lo mismo puede decirse de Asia y de algunos países hispanoamericanos. La prioridad esencial en otros muchos casos es simplemente elevar la calidad de la educación en diversos niveles o especialidades. ~~xxx~~

Aunque la IDA tiene una posición flexible, que permite considerar las particularidades de cada caso, la posición central es que cada proyecto que se nos presenta debe plantear el problema educativo integralmente y que sus proyecciones finales deben poder reflejarse en el desarrollo general del país. Aparte de los créditos en favor del desarrollo de la educación que ofrece la IDA a los países miembros en vias de desarrollo, el Banco está estudiando ahora la posibilidad de hacer también donaciones para algunos proyectos educativos, utilizando para ello el fondo proveniente de los beneficios acumulados como resultado de sus operaciones crediticias regulares.

Dentro de ese programa se decidió muy recientemente el copatrocinio con la Unesco del Instituto Internacional de Planeamiento de la Educación que esperamos inaugure sus actividades en Paris a mediados de este año.

Todo ello nos hace concebir la esperanza de que cada día estaremos mejor preparados para dar respuesta efectiva y eficaz a las necesidades educativas que todos los países tienen. Para contribuir a la realización de esa esperanza y vital necesidad se ha creado la División de Educación del Banco y de la IDA

English translation
Tape recorded in Office of Information
for Radio Nacional of Spain in Spanish (March 1963)



Statements of the Chief of the Education Division of the World Bank and IDA, Ricardo Diez-Hochleitner, for National Radio of Spain (March 1963)

The recent decision of the World Bank and its affiliate IDA to establish a Division of Education is, I believe, a good thing, for it provides tangible proof of the changing times and of the far-reaching changes of the present day.

A brief backward glance at what has happened in the field of education in the past ten years fills me today with vivid and nostalgic recollections. Even less than ten years ago, the fascinating undertaking of total planning of education, conceived by Latin American countries, in Colombia, in order to eliminate the frustrations, and to realize the expectations and the hope that education represents to youth, in order to achieve equality of opportunity on the morrow, seemed to us almost unbelievable. Education, however, had often been denied, or had had to wait for, the economic facilities that it required for its essential function as a vehicle for and guardian of the culture and values of the people, as the backbone of social and economic development. Until very recently, international financing or credit for the development of education was only a dream. Today, however, it is admitted that while one part of the expense of education can be regarded as consumption, that expenditure is at the same time one of the most profitable investments in the world today, and has one of the greatest potentials as an economic and social multiplier. I will go further: without an education policy coordinated with what many people nowadays like to call the strategy of developing human resources, in other words, the study and forecasting of the needs for unskilled and skilled labor to carry out the plans for economic and social development, no country can seriously face the future.

The presence of education in so distinguished an international organization as the World Bank is in itself a valid proof of the weight and worth of these new ideas and indicates that not only the noble purposes of education which cannot be ignored, but also the very distinguished position of education as one of the best instruments of development and as an investment with a multiplying effect are being given recognition.

The Bank and its affiliate IDA want to encourage the development of education and, in particular, to help those countries that are already making a great effort to promote education and carrying out the necessary structural reforms to enable their own action to gather momentum. In this way, by helping those who help themselves, we hope to become more effective.

IDA has in fact begun to finance projects for education, with a first credit to Tunisia, and we hope that this will very soon be followed by other credits to countries in different regions.

TRANSLATION SECTION 912/63	
Translated From: Spanish 9/6/63	By: GA:asl

This financing is done through capital investments in buildings, equipment, the services of experts, etc. which the countries cannot afford if they are at the same time obliged to increase their current expenditures because of the increases in registration at the various levels of education and the additional teachers that that requires. We regard the projects submitted to us for financing as part of the education system, as part of the overall needs of education and training, and we finance those projects that have sufficiently high priority because it is necessary to choose conscientiously from among several alternatives those projects that best serve the country's development. In other words, without forgetting that the basic purpose of education is culture, the Bank inclines toward the financing of educational projects closely connected with an economic and social development plan.

In Africa, priority of assistance generally goes to the middle level of education, which has long been neglected. This is the level that produces the people for whom Africa has a vital need for many occupations. Nearly the same is true of Asia and of some Latin American countries. The essential priority in many other cases is simply to raise the quality of education at various levels or in various special fields.

Although IDA's position is flexible, which enables it to take the special features of each case into consideration, the central position is that each project submitted to us must state the whole educational problem and that ultimately it must have an effect on the general development of the country. Besides the credits offered by IDA to the developing member countries for the development of education, the Bank is now considering the possibility of also making grants for some educational projects, using for that purpose the funds from the accumulated profits on its regular loan operations.

Under this program it was recently decided to cosponsor, with Unesco, the International Institute of Educational Planning which we hope will begin work in Paris about the middle of this year.

All of this leads us to hope that day by day we shall become better prepared to provide an effective and efficient response to the educational needs that are present in all countries. It was in order to contribute toward the realization of that hope and vital need that the Division of Education of the Bank and IDA was established.

English translation
Tape recorded in Office of Information for
Radio Nacional of Spain in Spanish (March 1963)

Mr. Mrs. Eliason

Room 461

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IDA, Ricardo Diez-Hochleitner, for National Radio of Spain (March 1963)

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INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
INTERNATIONAL DEVELOPMENT ASSOCIATION
(EDUCATION DIVISION)

EDUCATIONAL PLANNING

Washington, D.C.
June 10, 1963

R. Diez-Hochleitner

EDUCATIONAL PLANNING

The growing interest and participation of economists in educational planning is one of the most encouraging recent developments in the field of education, and has attracted the attention of other disciplines to the problems of educational development. More people now insist on an inter-disciplinary approach to these problems as the most valid method for dealing with such a vast and complex field. ^{1/} Only a few years ago, educators began to bring together educational administrators and economists, and other specialists. True, the educators' primary concern was to ensure more internal and external funds for education. Nevertheless, the rapprochement has certainly broken the ice for the educational sector; education is now widely accepted as a prerequisite for general development programmes and as a major factor contributing to economic growth. It has also made the educators, both in advanced and developing countries, aware of the need to reappraise the general and specific goals and methods of education. However, educators have not yet realized the importance of a better understanding of economic theories and their application to educational problems. For their part, the economists have not properly taken account of a long history of pedagogical research and practice; sometimes they have ignored the cultural and social role of education.

Both groups, however, are now searching for new solutions; mutual problems are being defined, and there is more understanding of the difficulties and limitations.

This text is intended not only for those who advise governments on educational planning, but particularly for economists who are interested in educational planning who are willing to help develop a sound approach to education and training problems.

^{1/} - A first attempt at the international level was made by Unesco and the French National Commission for Unesco. cf. Colloque sur la planification de l'éducation dans ses rapports avec le développement économique et social, Paris, 1959. In: Tiers Monde, Paris, Vol.I, Nos.1-2, January-June 1960 (pp.27-250).

Nature and Scope of Educational Planning ^{2/}

Educational planning is the frame of reference and the point of departure of the inter-disciplinary approach. It is also the logical response to the universal trend towards planning overall development. Planning is an instrument, not a goal or an end in itself. It is an attitude reflecting the desire for orderly change and the strategy by which this change can be brought about. Secretary-General U Thant, in presenting his proposals for the United Nations Development Decade, stated that "development is not just economic growth: it is growth plus change" and nowhere is this more strikingly illustrated than in the countries of Asia, Africa and Latin America in their search for new solutions to the old problems of poverty, hunger and ignorance.

Educational planning is a cohesive force that co-ordinates and directs the many different components of an education system and ensures that widely-accepted long-term goals, such as universal primary education, are approached more objectively. It implies a realistic appraisal of the country's financial means, its human resources and institutional structures, and other factors bearing upon the success of an educational plan.

Educational planning is not a magic formula that will come up with ready-made solutions. It is an instrument to channel all knowledge about education and related disciplines into the preparation and implementation of long-term and short-term educational development plans.^{3/}

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- 2/- The nature and scope of educational planning were described by Mr. G. Betancur in his statement to the Second Inter-American Meeting of Ministers of Education (Lima 1956). A summary of his statement can be found in: Betancur-Mejia, G., "Significado y alcance del planeamiento educacional". Educacion (Havana), año XVIII, No.2, febrero 1959, pp.23-29, 34. The Inter-American Seminar on Overall Educational Planning (Washington 1958) produced a comprehensive definition on the subject which is still valid today. (Recomendaciones del Seminario Inter-americano sobre el planeamiento integral de la educacion. Special issue: La Educacion, No. 11, July-September 1958, Washington, D.C., p.5). The Twenty-Fifth International Conference on Public Education, in Recommendation No.54, also discusses the nature and scope of educational planning. (International Conference on Public Education, 25th. Planning of Education, Recommendation No.54. Geneva Unesco/IHE, 1962).
- 3/- A "plan" is defined in this paper to include the overall objectives of education. A "programme" is a more detailed determination of specific objectives to be achieved in a specified time schedule. "Projects" are individual components of programmes.

Since it is primarily a tool of development, it can be applied to the most widely varying socio-political environments and adapted to the goals of each country. It involves willingness to size up the situation, to measure the country's capacity to respond to that situation, and to prescribe the action to be taken. Because educational planning necessarily implies a global approach it brings to light shortcomings and needs that hitherto had been ignored or unknown. By placing these in proper perspective, it ensures a balanced distribution of energies and resources both for short-term and long-term action.

In addition, educational planning has the difficult task of ensuring that education fits harmoniously into the pattern of change, that it is sufficiently progressive to produce the kind of social and technical leadership and qualified manpower required, while at the same time preserving the continuity and development of a society's cultural identity. Opinions will differ on which should come first but there can be no disagreement on the need for a harmonious blending and development of both.^{4/}

Organizational Aspects

Educational planning presupposes the existence of administrative and executive machinery. Information must be gathered on past and present situations, problems analyzed, and alternative solutions determined. Each level and branch of education must be correlated, educational goals linked to global development plans, inter-disciplinary participation (educators, economists, sociologists) ensured and the permanent active support of the general public sought.

While it is true that there are no hard and fast rules for educational planning and that each country must adapt the specific organizational details to its own administrative, political and

^{4/}- The need to combine both economic and cultural aspects of educational planning is further stressed by H.S. Parnes when he suggests a two-fold approach to the problem of existing educational requirements which he calls "manpower-requirements approach" and the "cultural approach". ("Educational Needs for Economic and Social Development", OECD Mediterranean Regional Project, paras. 26-27, Paris, 1962). F.F.Hill's statement seems to me also particularly pertinent: "The traditional values of existing cultures frequently were regarded principally as obstacles to development. The contributions of these factors to the coherence, dignity and independence of societies in the newly independent countries were not sufficiently understood and appreciated. They are now widely recognized". ("Education and Development: Key Issues for Policy Makers" by F.F.Hill, paper delivered before Third National Conference of the Canadian National Commission for Unesco held in Ottawa, March 1963).

institutional set-ups, two main administrative units are a pre-requisite.

First, a unit at the inter-ministerial level, preferably as part of the national authority in charge of economic and social development planning which is to determine the needs for qualified personnel and to coordinate the efforts to supply them. The educational sector must be represented on the development authority where policy and budgetary decisions are taken. Ministries of Education must have a preponderant role since they are not only major employers of qualified personnel in terms of administrators and teachers but also because they are the sole source of people with enough education to profit by the training for the various global development programmes and projects.

The second essential unit is the educational planning authority itself. This unit is to plan the educational system, including all educational levels and branches as well as adult education. A close relationship must be maintained with the development authority and its manpower unit, so as to correlate the country's broad goals to its financial capacity and manpower resources and requirements. The educational planning office, in turn, will provide information in regard to the manpower requirements of the educational sector and its ability to meet the demand for education by the various other sectors.

Many countries have established educational planning offices^{5/} and are now beginning to create human resources development boards; but technical assistance in this field is still high on the list of requests from developing countries. The organization of educational planning units is usually difficult. This is due to the lack of trained and qualified personnel and also to the mistrust with which the planning unit is regarded by educational administrators who have been embedded for years in the administrative structure and are rarely capable of raising their sight from the day-to-day routine; they fear and resist innovation which they interpret as a threat to their pre-eminence and authority. In contrast, the sound educational planner must travel light; he carries but one basic premise: the pedagogically sound and productive expansion of education -- and he must help to find different solutions for each problem; he must not be afraid of departing radically from cherished traditions or ridding the administrative superstructure of dead-wood -- whether in terms of personnel or procedures. It is therefore perhaps less difficult to get an

5/- A list of countries currently embarked on educational planning can be found in: UNESCO, Educational Planning; a Preliminary Listing, Education abstracts, Vol.XIV, No.2, Paris, 1962. A case study is contained in: Diez-Hochleitner, R., Une experience pilote en Colombie: la planification integrale de l'education depuis 1956. Developpement et civilisations (Paris, Irfed), No. 5, January 1961, pp.67-76.

educational planning office off the ground in the newly-independent countries which are starting their educational systems from scratch and which do not have the institutional handicaps and pressure groups that exist in other developing countries.

It is essential that advisors on educational planning recognize that planning is an inseparable component of modern administration. This does not mean that educational planning must be superimposed on or supplant normal administrative machinery. On the contrary, educational administrators must be actively involved in planning; they must follow it step by step, because they are the ones who will have to supervise its implementation. Educational planning units can be effective only if they are assured of the cooperation of sound school administration; this means a constant two-way exchange of information that will permeate the entire educational structure of a country.

Education and Training: Problems of Expansion and Improvement

The following reviews some of the more evident and common problems of the developing countries, although they are by no means confined to these countries.

Generally, the problems include: preferential attention to extending primary education without a proportionate effort to raise its productivity in terms of the number of students who complete the primary cycle (related problems: pupil drop-outs, repeaters and absenteeism) or to improve the quality of education (related problems: pre-service and in-service training of teachers, salaries and other incentives for members of the teaching profession, textbooks, modern teaching methods and teaching aids). As a result, most of the figures on primary school enrollment are largely fictitious.

From the economic point of view, the investments in pupils who drop out of school after the first or second year are clearly wasted. Therefore, one of the most urgent tasks for educational planners is to increase the holding power of schools. The economic return after the second school year increases in proportion to the number of years completed within a scale that educators insist should be a minimum of six years.

From the sociological point of view, many of these countries still maintain a double educational standard that discriminates against the rural populations. There are, in effect, two educational systems: the urban primary schools that offer the full primary education cycle, have more and better-trained teachers, and generally receive preferential treatment in regard to textbooks, equipment, and buildings; and the rural primary schools that offer two, three, and at the most four years of the primary cycle, that are often ill-housed, badly located, taught by novices who do not remain long in rural schools, and that have

practically no textbooks, teaching aids or equipment.

Flexibility in planning for rural primary schools is particularly commendable since it is an area where local initiative is highly desirable and badly needed.

In spite of the fact that most governments have endorsed the principle of universal, free and compulsory primary education, many developing countries cannot afford to continue giving it absolute priority over all other types of education. This question of balance is of great importance in educational planning, as will be discussed later on. The developing countries should limit the expansion of primary education at least to the rate at which teachers can be properly trained and adequate facilities provided. Nevertheless, some waste is unavoidable in the period of transition and rapid growth typical of these countries. Educational and general development goals should be reviewed and adjusted to keep this waste to a minimum.

Most of the problems found at the primary level are also found at the secondary level. Generally speaking, of the very low percentage of pupils who complete primary education, an even lower percentage have the opportunity to enroll in secondary schools, particularly in the newly-independent countries. This seriously obstructs the educational process. No single country, even those that make the greatest effort, can claim to have produced enough secondary school graduates for all the middle-level skilled occupations in the various sectors of the economy. Vocational training schools as a whole badly need help to relate their programmes more closely to anticipated job opportunities and also to gain prestige. Nevertheless, the most important, the most urgent task in these countries is to diversify secondary-level education in terms of distribution of enrollment by branches and in terms of adjusting the curriculum to the present and future manpower needs. At the same time, secondary education should impart adaptability more than training for specific jobs. At a recent policy conference ^{6/} it was recognized that "because of the difficulties and risks involved in making long-term forecasts of the structure of the active population, and the frequent changes in techniques and consequently in manpower requirements, programmes for technical education should be as flexible as possible and should be based on a wide general education. This will facilitate the necessary periodical revision of professional and vocational education".

Although higher education has many of the problems mentioned in connection with primary- and secondary-level education, it enjoys the advantage of a tradition that reaches back to the Middle Ages when the universities were the focal point of the educational system. Moreover, universities often possess a degree of autonomy even though in many cases

^{6/}- Policy Conference on Economic Growth and Investment in Education, Washington, October 1961, OECD, Vol. I, p.13. "The Planning of Education".

they receive government funds. Therefore, it has sometimes proved difficult to correlate - in terms of administration - the higher education services within the educational system. But there is a growing awareness of the need for planning higher education also in the context of educational planning.

Here again a common problem is distribution of enrollment in the various university faculties in terms of the immediate and long-term needs of the country for leadership and knowledge to organize the development programmes of the various sectors. Science and technology and research are badly neglected in developing countries. But at the root of most of these problems lies the great need for full-time professors both for teaching and research activities.

Adult education, often overlooked, falls into three distinct categories: (a) the type offered in the more advanced countries and which is generally provided through university extension courses, including post-graduate work; (b) adult education devoted to training for new skills according to changes in technology and in occupational market demands; and (c) adult education for illiterate adults or those of low educational levels who are to be absorbed into the economically-active population by community development programmes, literacy programmes, training schemes and other socio-economic programmes such as cooperatives, rural-industrial estates, etc. This third type of adult education is of direct concern to developing countries and calls for a comprehensive approach. Pure literacy campaigns do little more than engender or aggravate social and individual frustrations; they do not supply the vital needs of adults whose illiteracy is rooted in socio-economic causes and who very rightly seek first to improve their living standards. Isolated literacy campaigns in the long run produce a large percentage of functional illiterates. Economic considerations are of primary importance in adult education. To divert funds from the national budget to finance adult education can be justified to the extent that the adults trained can be assured a better job and thereby contribute to the country's gross national product. Illiterate adults are a source of grave social tensions if their hopes are raised and then left unfulfilled by "quickie" literacy campaigns that teach them nothing more than the bare essentials of reading and writing and rarely provide a follow-up programme for the newly literate to continue advancing his knowledge and skills.

To summarize, the major role of the educational planner is to study the situation and problems of education and training in the light of demographic, economic and social factors, including those of health and nutrition, and to plan the balanced expansion of the various levels and branches of education, providing at the same time for a continuous improvement in educational standards and increasing the number of students graduating from each level. Accomplishment of this most difficult and

complex task represents the best contribution that education can make to economic and social development. It should also be pointed out that there is no conflict, necessarily, between qualitative and quantitative expansion - between primary versus secondary education, or between secondary versus higher education. The educational process is an organic whole that must respond quickly to the continual adjustments called for by changing circumstances.

Specialists called upon to advise on educational plans will logically tend to establish priorities. But priorities in education - as in any other sector - should not be absolute and mutually exclusive. They should represent a series of interlocking actions each of which will affect the others. In defining priorities, care must be taken to spell out the quantitative implications so as to ensure that they are within the capacity of the country's resources. Among the priorities that can be established prima facie, in practically every circumstance, are the following:

- a) need for establishing and reinforcing the machinery for planning of education including educational statistics, and for manpower studies, in order to make the best use of the resources available;
- b) improvement of the administrative structure, including personnel and procedures, to allow the effective implementation of programmes and projects;
- c) training of teachers, professors, supervisors and administrators, who are the body and soul of any educational system;
- d) pedagogical research to ensure that policies resulting from planning are based on realistic and specific solutions that respond to the idiosyncrasies, the cultural heritage and long-term aspirations and goals of the country;
- e) modern teaching methods and teaching aids, which determine the effectiveness and impact of the human resources devoted to the great venture of education and training, and which greatly influence the cost and the multiplier effect of the educational institutions;
- f) school construction and equipment, not simply to provide an educational "roof" but as an essential element in producing the atmosphere conducive to the efficient use of the school plant.

Administration and Finance

Education, embracing both public and private institutions and facilities, is one of the largest sectors of national life. Huge sums are involved: in addition to the regular education budget, funds and other services are provided by other ministries, provincial, state and local authorities and private sectors -- even so, they are frequently not enough to cope with the most urgent needs. Educational services absorb the largest proportion of civil servants. Furthermore, education is concerned with the whole population, although more directly with children of school age, who represent an average of one-fourth of the total population. Educational institutions are supposed to mould individuals and through them the values and attitudes of the societies in which they live. In other words, it is perfectly valid to say that education is one of the main enterprises -- if not the most important -- of any nation.

However, the sad fact is that education and training do not always employ or attract the most qualified leaders, administrators or specialized personnel. Ministries of Education are all too often given to petty politics and intrigues and have little awareness of or concern with the potential economic value of the vast sums at their disposal. It is therefore essential for those advising governments on educational planning, as it is for those directly involved in planning, to review the administrative structure and bring some order into its activities before embarking on the planning operation. 7/ It is also essential to ensure that suitable personnel are placed in charge of the plan's execution and that modern administrative procedures are established. Once the plan is adopted a further review of administrative problems is needed to make the administrative machinery adequate to the goals of the plan.

It is essential to introduce the programme and budget technique into educational administration. This technique calls for financial justification of the various programmes and projects, and is an effective tool for avoiding the formulation of so-called "plans" which are little more than a list of idealistic goals that more often than not are unrealistic.

Financial management of education budgets still leaves much to be desired in the developing countries. Capital investments and recurrent expenditures have to be analyzed not only from the educational point of view but also from that of economic returns. The project approach is an essential feature of sound financial policies and should

7/- La Programacion Administrativa, R. Diez-Hochleitner, "Documentacion Administrativa", Vol.72, Madrid, 1959.

conform to the most advanced practices followed by other sectors. Because of the lack of experience in this field and the lack of continuity of the educational administrative machinery, such basic tools as statistics and cost analyses are still undeveloped.

A new dimension has been added to the financing of education with the increasing international financial sources such as the U.N. Special Fund, the International Bank for Reconstruction and Development and its affiliate the International Development Association and, at the regional level, the Inter-American Development Bank. Added to these are many bilateral aid programmes, and last but not least are the private foundations such as Ford, Rockefeller, Carnegie and Nuffield.

The lack of well-devised projects is more and more evident, and educational planning is being considerably strengthened by these agencies which increasingly are making it a pre-condition for the beneficiary countries to produce viable plans, with adequate justification. The developing countries have to realize that the expansion or improvement they are seeking calls for initial capital outlays; they must realize that it also implies -- after a few years and over a long period of time -- very heavy recurrent expenditures to ensure efficient operation of new facilities -- a burden which generally has to be borne by the national budget itself.

The Planning Process

Before the actual work of drawing up an educational plan begins, the administrative machinery referred to earlier must, of course, be in operational condition. It is not my intention to detail the various aspects and steps to be followed in drawing up a plan, but simply to indicate certain basic elements which are constant factors in the planning process. 8/

The point of departure for educational planners must be the past history and present reality of the country's education and training

8/- More detailed information can be found in Elements of Educational Planning, Educational Studies and Documents, No. 45, Unesco, Paris, 1963. For information on a specific case, see Vol. I, Chapter 2.23(5), Methodology of Planning, of the Informe del Proyecto Para el Primer Plan Quinquenal Ministerio de Educacion Nacional. Oficina de Planeamiento. Bogota, 1957, 5 vols. processed. See also, Mechanics of Planning, a working paper presented to the Inter-American Seminar on Overall Educational Planning, 1958, Unesco/OAS, Documentos de trabajo, Washington, D.C., Union Panamericana, 1959, 5 vols.

services and related factors. The first step, therefore, will be to survey the educational situation and needs. This calls for well-organized statistical services to provide essential and reliable data. This effort alone would justify the creation of educational planning machinery, because in the process of establishing the educational situation and needs, corresponding solutions present themselves. Once the extent and nature of the action required is known, an atmosphere of confidence is created that filters through the country's policy-making bodies. Realistic diagnosis of a problem and of the resources available to deal with it usually stimulates action by all concerned. In more than one case, this process has produced additional financial support because it has created an awareness of the urgency and dramatic proportions of the problem. The survey should be as comprehensive as possible and cover both qualitative and quantitative aspects, as well as financing and administration. Once it is completed, the next step is to establish priorities and possible alternative solutions to allow for changing circumstances and resources.

Particular attention must be given to costing and financing, the human resources potential for education and the country's overall needs for qualified manpower.

The results of manpower studies should be taken into account particularly for the following purposes:

- a) to establish the order of magnitude and distribution among the various types of secondary and vocational schools;
- b) to establish the order of magnitude and distribution among the various types of higher education institutions;
- c) to programme adult education activities to supply the short-term needs of the various sectors of the economy.

Due recognition must be given to the symbiosis between the educational pyramid and the economically-active population. The Correa-Tinbergen model can provide the general review and the inter-relationship between the educational system, the labour force and a desired economic growth rate.

Many educational planners have experienced difficulties at the point of formal adoption of the plan. It is precisely at this juncture that the weight of public opinion can and should be brought to bear. Public opinion is an intangible but important element that educational planners must take into account and every effort should be made to awaken public interest and support of the nation's educational goals.

A plan that is to succeed in a democratic society needs to be understood not only by those who will participate directly but also by those who are to benefit from it. Every step of the plan's development

should be accompanied by a campaign explaining its aims so that each sector of the public is identified with the goals and recognizes its civic responsibility to contribute to the success of the plan.

The case for permanent educational planning machinery cannot be put too strongly. The educational planning process does not end the moment the plan is adopted. On the contrary, the authors of the plan must closely watch its execution. Educational planners must be on hand and directly involved in the periodic evaluation of the various phases and parts of the plan, for two major reasons: first of all, because planning calls for periodic adjustment to new circumstances, and only the day-to-day experience can establish feasible and realistic solutions; second, because planning involves a constant search for new and better techniques ^{9/} for subsequent plans that must be drafted in the light of the results of the preceding plan.

These, then, are the basic steps in planning education and training programmes. Let me also reiterate the importance of ensuring an intimate working relationship with the economic and social development planning machinery.

Regional Planning

The idea of educational planning was first advanced and recommended in 1956 at the regional level on the occasion of the Second Inter-American Meeting of Ministers of Education in Lima. It subsequently established national goals in Latin America, but more recently a series of regional conferences ^{10/} has been establishing short- and long-term regional goals, both quantitative and qualitative, that are providing a broader frame of reference for the development of education and training. These goals also guide educational planners in a first attempt to underscore the magnitude of the enterprise by placing it within the regional context and thus make governments and leaders more aware of their countries' responsibilities and limitations.

^{9/} - For an introduction to operational research into educational planning see: "Use of Comparative Education in Planning of Education", R. Diez-Hochleitner: International Review of Education, Thoughts on Comparative Education, 1959.

^{10/} - In chronological order:

Regional Meeting of Representatives of Asian Member States on Primary and Compulsory Education, Karachi, December 1959-1960.

Conference of Representatives of Ministries of Education of Arab Member States of Unesco on the Needs of Educational Development, Beirut, February 1960.

Guidance on the general concepts and techniques of educational planning is also being provided at the regional and international level: for example, the Inter-American Seminar on Educational Planning, Washington 1958 (see footnote 2), the International Symposium on Educational Planning, Paris 1959 (see footnote 1), and the OECD Policy Conference, Washington 1961 (see footnote 6).

In Latin America, a first attempt and interesting experience in regional planning was undertaken by the OAS Education Task Force, 11/ established to work out in more detail the broad and ambitious goals of the Ten-Year Education Programme adopted in 1961 (Punta del Este Charter, Resolution A.1). Its report will be presented to the Third Inter-American Meeting of Ministers of Education in August 1963, for the guidance of each of the countries involved, because each will have to make its own plans according to its specific needs and means.

Research and Training

Various regional training centres have been established during the past few years such as the ones in New Delhi, Beirut and Santiago, and an International Institute for Educational Planning in Paris is being sponsored by several international organizations to promote research and to coordinate international training activities. Several courses have been held 12/ and various national institutions are already doing promising research work in this field. Those responsible for training educational planners and for research into the techniques and problems of educational planning should be careful not to let their thinking and knowledge become stale or to regard the theories and techniques of planning as being established once and for all. There is still a long way to go in this new discipline that overnight has become the "vedette" in educational circles and in which so much hope has been placed by governments and educational leaders all over the world. 13/ A reservoir of knowledge has to be built up, more sophisticated techniques elaborated, and those responsible must keep abreast of developments in economic planning.

R. Diez-Hochleitner.

10/- (continued) In chronological order:

Conference of African States on the Development of Education in Africa, Addis Ababa, May 1961.

Conference of the Inter-American Economic and Social Council at the Ministerial Level (Ten-Year Educational Program, Alliance for Progress), Punta del Este, August 1961.

Policy Conference on Economic Growth and Investment in Education, Washington, October 1961.

10/ - (continued) In chronological order:

Conference of African Ministers of Education, Paris, March 1962.

Conference on Education and Economic and Social Development in Latin America, Santiago, March 1962.

Meeting of Ministers of Education of Asian Member States, Tokyo, April 1962.

11/ - Final Report of the OAS Task Force on Education. "Perspectivas del desarrollo de la educacion en America Latina", Washington, 1963.

12/ - Organization of American States "Curso de Bogota sobre planeamiento de la educacion". La Educacion, Washington, D.C., (No.17, pp.3-63; 72-85). Spain-Unesco, La Educacion y el desarrollo economico-social. Planeamiento integral de la educacion. Objetivos de Espana para 1970. Curso-Coloquio, Ministerio de Educacion Nacional. Madrid, 1962.

13/ - "I believe that it is in this task of planning the future -- perhaps more than in operational activities, however necessary they may be -- that lies the principal and immediate vocation of (international) organizations and, certainly, of Unesco". R. Maheu, Inaugural Address to the Conference on Education and Economic and Social Development in Latin America, Santiago, Chile, March 1962.

INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT

INTERNATIONAL DEVELOPMENT ASSOCIATION

(EDUCATION DIVISION)

EDUCATIONAL PLANNING IN LATIN AMERICA: A REGIONAL APPROACH

(Paper Submitted to the International Conference on Educational Planning,
Berlin-Tegel, July 1-6, 1963).

Washington, D.C.
June 28, 1963.

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EDUCATIONAL PLANNING IN LATIN AMERICA: A REGIONAL APPROACH

Introduction

It is a privilege and a great pleasure to address such a distinguished group of colleagues. I must confess, however, that I experience somewhat mixed feelings of gratification and dismay upon receiving the Committee's kind invitation to participate in this meeting, because I have been involved for so long with Latin America's educational problems and in "selling" educational planning that I am beginning to think that I must sound like a broken record.

But in preparing for this meeting, I found that it gave me a good opportunity to take stock of past developments in educational planning in Latin America and to place them in some sort of historical perspective.

I shall begin with a chronological account of the major events related to educational planning in Latin America, together with a description of the evolution in concepts and theories, and a brief appraisal of the problems encountered. I shall then discuss the work done by the OAS Education Task Force which I believe represents a very interesting example of educational planning at the regional level.

Chronological Developments and Evolution of Educational Planning in Latin America

The idea of educational planning was first advanced and recommended in 1956 at the regional level during the Second Inter-American

Meeting of Ministers of Education in Lima.^{1/} The resolution approved was an inspired attempt to introduce planning techniques into the administration of education, at a time when economic planning was being somewhat cautiously accepted in Latin America. Thus, in a good many cases, educational planning preceded economic planning and to a certain extent even contributed to a better understanding and more positive attitude towards economic planning. The recommendation made at this Ministers' meeting was especially noteworthy because it referred to the necessity for overall planning of education as opposed to partial planning, in terms of levels and branches of education, as had hitherto been attempted in many countries. It further called for realistic adaptation of educational plans to the socio-economic needs of

1/ "To the governments of Member States:

- "1. That an overall plan for education be prepared covering all levels of education, and realistically adapted to the needs of the country; and, in addition, providing for new facilities for the preparation of technical and administrative personnel, school buildings, equipment, textbooks, etc. in order to meet demographic growth and general development of the country.
- "2. That a Department of Planning be established in the Ministry of Education or other competent office, which will be responsible for the formulation of overall plans, their systematic and periodic revision and adjustment to changing needs. Finally, the Department of Planning would supervise the execution of these plans.
- "3. That a report be submitted to the Organization of American States on the preparation or development of overall national plans, these reports to be distributed by OAS to Member States.

"To the Organization of American States and UNESCO:

- "4. Assistance be provided to Member States by sending teams of experts to draw up comprehensive educational plans.

Proceedings of the Second Inter-American Meeting of Ministers of Education, Lima (Peru), 1956. Pan American Union, Washington, 1957.
Original in Spanish.

each country, thus introducing the principle of coordination with global plans for economic and social development. However, in the absence of concrete experience and knowledge, the resolution remained hardly more than an expression of good intentions.

Colombia took the first practical step one month later by establishing an Educational Planning Office in the Ministry of Education. This office immediately began to work out the details of a first five-year plan, a draft of which was published in June 1957.^{2/} Colombia already had prepared a plan to expand vocational and technical education and had also created an Institute to provide financial credit for persons seeking technical or specialized training abroad. These ambitious but isolated efforts set the stage for the broader approach recommended at the Ministers' meeting. One of the major difficulties encountered by the new educational planning office was the absence of a socio-economic frame of reference since the economic planning unit was still in a very embryonic stage. Subsequently, and in spite of the dedicated efforts of the educational planning office to introduce an orderly pattern of development into the country's educational system, chronic political and administrative instability interfered with the systematic implementation of planning.

Nevertheless, this first concrete experience in Latin America generated wide interest among educational leaders within and outside the region. Responding to a recommendation of the Second Meeting of Education

^{2/} Diez-Hochleitner, R., Une experience pilote en Colombie: la planification integrale de l'education depuis 1956. Developpement et civilisations (Paris, Irfed), No. 5, January 1961, pp. 67-76.

Ministers, the Pan American Union decided in 1957 to organize an inter-American seminar on the overall planning of education.^{3/} By the end of the same year—1957—the Ninth General Conference of UNESCO, held in New Delhi, approved the launching of a Major Project for the Extension and Improvement of Primary Education in Latin America. This was to be carried out over a period of ten years, one of its chief objectives being the systematic planning of education in the countries concerned, and to ensure a more balanced approach to the specific efforts in primary education which is the Major Project's overall aim.

In June 1958, after one year of preparatory work, the Inter-American Seminar on the Overall Planning of Education was held in Washington under the joint auspices of the OAS and UNESCO. The seminar underlined the necessity for integrated educational planning and recommended the establishment of technical offices to channel educational planning in close cooperation with other national agencies responsible for the planning of economic and social development. The recommendations of the seminar dealt broadly with the principles, methods and techniques of educational planning, as well as with the particular aspects of each educational level,^{4/} and drew heavily

^{3/} For detailed information see Vol. I, Chapter 2.23(5), Methodology of Planning, of the Informe del Proyecto para el Primer Plan Quinquenal. Ministerio de Educacion Nacional, Oficina de Planeamiento, Bogota, 1957, 5 vols. processes. See also, Mechanics of Planning, a working paper presented to the Inter-American Seminar on Overall Educational Planning, 1958, which departs from the Colombian methodology, UNESCO/OAS, Documentos de trabajo, Washington, D.C., Union Panamericana, 1959, 5 vols. A further attempt to generalize this methodology is made in Elements of Educational Planning, Educational Studies and Documents, No. 45, UNESCO, Paris, 1963.

^{4/} Detailed information on the seminar and its recommendations were published in a special issue of the review La Educacion, No. 11, July-September 1958, Pan American Union, Washington, D.C.

on the Colombian pilot experience. The concepts and conclusions reached by the seminar are still valid today.

As a result of the rapid and wide acceptance of educational planning in Latin America, UNESCO was literally flooded by requests for technical assistance in this new field. Since 1959, most of the Latin American countries have been provided with experts in educational planning under the U.N. Technical Assistance Program. In addition, a UNESCO regional team, consisting of three experts in educational statistics, financing and administration was made available at the request of Member States under the UNESCO Major Project mentioned earlier. In order to train national senior staff, local counterparts were assigned to work closely with the team of foreign experts.

In 1959, the first Inter-American Training course on Overall Educational Planning was organized by the OAS in collaboration with UNESCO and the Government of Colombia. Thirty-three fellows from nineteen Latin American countries attended the course in Bogota, Colombia. Most of the participants were high-level officials of education ministries.^{5/} Similar courses have since been organized at the national level in several countries. Also, under UNESCO auspices, study tours in countries outside the region have enabled officials from Latin American ministries of education to study the problems, techniques and experience of other countries in educational planning.

^{5/} For details regarding the organization, content and results of this training course, see: "Curso de Bogota sobre planeamiento de la educacion", La Educacion, No. 17, pp. 3-63, Pan American Union, Washington, D.C.

In view of the ever-increasing requests from Latin American governments for technical assistance in educational planning, and in response to an urgent recommendation of the OAS Education Task Force,^{6/} UNESCO organized a second regional training course in educational planning at the Latin American Institute for Economic and Social Development Planning in Santiago, Chile. ILO and US-AID collaborated with UNESCO in this three-month training course (September-December 1962) which was attended by twenty-nine educational planning officials from fifteen Latin American countries.^{7/} The U.N. Economic Commission for Latin America is the sponsoring agency for the Santiago Institute. In May of this year the Commission and UNESCO agreed to establish a permanent educational planning branch within the Institute. The new branch will carry out in-service training together with research work and will provide advisory services to countries in the region.

In recounting developments in educational planning in Latin America, it is worthwhile to mention the Special Meeting of the Inter-American Economic and Social Council, at the Ministerial level, in August 1961 in Punta del Este, Uruguay. One of the resolutions annexed to the Punta del Este Charter—Resolution A.1—^{8/} urged that "each country adopt an overall educational plan for the attainment of precisely defined goals within the next ten years, for the purpose of raising the cultural level

^{6/} OAS Education Task Force. Projects for Immediate Action. Washington, February 1962.

^{7/} A report on the course can be obtained from UNESCO under the title: "Curso de capacitacion en planeamiento de la educacion, 1962. Informe del Director y de los Co-directores".

^{8/} Charter of Punta del Este. Alliance for Progress. Pan American Union, Washington, 1961.

of the peoples of Latin America" and outlined a seven-point program for educational development under the Alliance for Progress.

In March 1962, after almost two years of careful preparation, the Conference on Education and Economic and Social Development in Latin America was held in Santiago, Chile, under the multiple sponsorship of UNESCO, ECLA, OAS, ILO, and FAO. One of its main tasks was to follow up the recommendations made in Resolution A.1 of the Punta del Este meeting. This conference made a searching reappraisal of the first attempts at educational planning in Latin America and reaffirmed the necessity of linking educational planning to global plans for economic and social development. It stressed the importance of manpower surveys and provided quantitative regional targets for each educational level during the forthcoming decade. On the basis of rough cost estimates, the so-called Santiago Declaration^{9/} asked Latin American countries to devote an additional one per cent of their GNP to education every five years during this decade by 1965 and again in 1970.

The OAS Education Task Force, to whose work I shall refer later, gives very high priority to educational planning in its Final Report.^{10/} It called for action at an early stage of its work under the so-called Projects for Immediate Action (cf. footnote no. 6) which were later endorsed by the Santiago Conference.

^{9/} UNESCO, ECLA, OAS, ILO, FAO. Report of the Conference on Education and Economic and Social Development in Latin America, Santiago, March 1962. UNESCO, 1962, Paris. See also: La Educacion, Vol. , Pan American Union, 1963, Washington.

^{10/} OAS-Alliance for Progress Final Report of the OAS Task Froce on Education. "Perspectivas del desarrollo de la educacion en America Latina", Washington, 1963, 250 pages and background papers annexed.

This, I believe, completes the chronological account of the evolution of educational planning in Latin America and I should like now to discuss some of the problems and obstacles encountered in its practical application.

A Summary Appraisal

First of all, it must be said that despite a broad acceptance of the need for educational planning and laudable efforts to carry it out, few countries have managed to formulate integrated plans for educational development patterned on the principles that have been advocated so consistently in the regional events mentioned earlier. The reasons for this vary. Good intentions are not enough. When it actually came to setting up national planning offices, almost all of these countries came up against a major obstacle—the lack of trained personnel required to operate these offices. But this obstacle was superseded by another more serious impediment, resulting from political instability. With every change of government, personnel would change. Inevitably, policies would change. The indispensable element of sound educational planning—continuity in policies and execution—has been missing. Weak administration, weak statistical services, lack of funds, and failure to understand the true nature and scope of educational planning, have complicated matters still further. In actual fact, some of these educational planning offices exist only on paper. Others, trying to function in spite of these obstacles have been kept on a low rung of the administrative ladder. Like Cinderella, they are deprived of the resources they must have if they are to grow and strengthen themselves. When they manage to survive these obstacles, they

find progress barred by a wall of distrust erected by educational administrators who have been embedded for years in the administrative structure and who are rarely capable of raising their sights from the day-to-day routine. These men fear and resist change, which they interpret as a threat to their pre-eminence and authority in educational matters.

These are only a few of the negative factors that have stood in the way of effective educational planning in Latin America.

Integration of Educational Plans with Economic Development Plans

Experience in Latin America also brings to light the principal problems of integrating an educational plan with plans for economic and social development.

These are the essential factors that must be dealt with—how to finance the educational plan; to determine the needs in respect of economic development and social progress; and the organization of the responsible agencies.

The draft plan implies the existence and formulation of an educational policy, backed up by a well-defined program and a budget adequate for its short- and medium-range objectives, within the framework of long-term objectives. The draft plan should indicate the administrative facilities, financial resources, and personnel that are necessary and available. A realistic plan for education must of course take into account the budgetary limitations imposed by the country's economic capacity. Thus, from the very beginning it is necessary to determine the financial effort the country can and should make in favour of education. This can be formulated in terms of a percentage of the national income or the national budget.

In some countries the final decision on the percentage allocated to education is simply a political decision, but it should also be based on technical recommendations in the draft plan. This means that the governmental agencies responsible for drafting decisions on finance and budget should include representatives of the educational planning services, and should be closely associated with the study and preparation of the plan.

Those responsible for the planning of education must clearly determine priorities or courses of action for the development of education, in order to produce a balanced plan that will offer a happy medium between the ideal and the attainable and will keep in mind the impact of investments in terms of recurrent expenditures.

From the standpoint of the national economy, educational plans can be considered programs to develop human resources, because they will guarantee the training of the skilled manpower required for economic and social development. This calls for surveys to ascertain how many skilled workers and specialists will be needed or, in general terms, an appraisal of the human resources needed for development, so the educational plan can set up targets and priorities.

The coordination between general development planning and educational planning must be intensified through closer working relations and better exchange of information. Each country should have an administrative unit for the study of skilled manpower needs under the authority of the national development planning agencies.

Various international organizations have begun to study the development of human resources in Latin America. The U.N. Economic

Commission for Latin America (ECLA) has carried out manpower surveys in several Latin American countries with a view to their future needs. The International Labour Organization and the Ford Foundation have also undertaken similar studies. The Organization of American States now has a coordination and development program aimed at evaluating and making projections of human resources in Latin America. The Education Task Force, in cooperation with ECLA experts, carried out a survey to determine the demand for high-level manpower in 1970 in Latin American countries. The Board of Central American Universities, with the assistance of OAS and the Ford Foundation, has made a similar study—in close collaboration with national planning agencies—based on the social and economic development plans of the Central American countries. In addition to these international efforts, various Latin American countries are undertaking or have already carried out manpower surveys.^{11/}

^{11/} For example: In Argentina the Economic Research Centre of the Torouato Di Tella Institute has made a comprehensive study of the present supply and demand of middle-level and high-level manpower and the outlook for the future. In Brazil, partial studies have been made by Centro Americano de Pesquisas (Resecordi) Educativas y Sociales on high-level personnel requirements and similar studies on skilled labour have been made by Servicio Nacional de Aprendizaje Industrial. In Colombia, Instituto Colombiano de Especialacion Tecnica en el Exterior, working in close collaboration with the national development planning agencies and Servicio Nacional de Aprendizaje Industrial, is carrying out a study of the present and future manpower requirements. In Chile, a comprehensive study has been planned by the Human Resources Committee, composed of representatives of the Corporacion de Fomento de la Produccion (Production Development Corporation) of the University of Chile. In Ecuador, the Development Centre, an agency of the Economic Planning Board, is responsible for manpower studies. In Mexico, a study on labour in the manufacturing industries was made by the Bank of Mexico. In Peru, a National Manpower Board was set up in February 1962; its executive unit is the Servicio Cooperativo del Empleo (Cooperative Employment Service). Venezuela has also made studies in this field; Instituto Nacional de Capacitacion Educativa has made a national survey covering the present demand for middle-level manpower.

The Regional Approach to Educational Planning in Latin America

During recent years, a series of regional conferences in various parts of the world has established short- and long-term regional goals, both quantitative and qualitative, which are providing a broader frame of reference for the development of education and training. These Conferences^{12/} have underscored the magnitude of the enterprise by placing educational development within the regional context and they have helped to increase the awareness of governments and educational leaders of their responsibilities and have led to better understanding of how best to use their limited resources.

In Latin America, the regional approach to educational planning has passed through four major phases, to which I have referred earlier in this statement and which can be summarized as follows:

12/ In chronological order:

Regional Meeting of Representatives of Asian Member States on Primary and Compulsory Education, Karachi, December 1959-60.

Conference of Representatives of Ministries of Education of Arab Member States of UNESCO on the Needs of Educational Development, Beirut, February 1960.

Conference of African States on the Development of Education in Africa, Addis Ababa, May 1961.

Conference of the Inter-American Economic and Social Council at the Ministerial Level (Ten-Year Educational Program, Alliance for Progress), Punta del Este, August 1961.

Policy Conference on Economic Growth and Investment in Education, Washington, October 1961.

Conference of African Ministers of Education, Paris, March 1962.

Conference on Education and Economic and Social Development in Latin America, Santiago, March 1962.

Meeting of Ministers of Education of Asian Member States, Tokyo, April 1962.

1. The Punta del Este Meeting (August 1961)

This meeting marks a turning point in the history of the Western Hemisphere. After many years of frustration and under the rising pressure of social tensions, the American Republics agreed to a concerted attack on social and economic problems. They formulated and approved the Charter of Punta del Este which calls for an ambitious development program in all major sectors, to be carried out with external aid as a supplement to national resources. Each country pledged itself to carry out basic social reforms. Recognizing that education is a pre-requisite for social and economic development, in which economic growth and change go hand in hand, the Charter's first annex is a resolution entitled: Ten-Year Education Program of the Alliance for Progress. It aims high - perhaps too high, one might think at first glance. But then one remembers the dramatic proportions of the task ahead, and realizes that a more modest program would not do the job. To ensure a detailed and practical approach, a separate resolution called for the creation of a Task Force to study the educational situation in Latin America and to suggest action, with particular reference to regional action.

2. The Santiago Conference (March 1962)

In response to a recommendation of the Punta del Este meeting, the Santiago Conference studied the goals of the Ten-Year Education Program and came up with estimates of the cost and the amount of external aid that would be required. The Conference also endorsed a series of projects for immediate action, prepared by the OAS Education Task Force, some of which were put into effect almost immediately following the Conference. The specific task of the Santiago Conference, however, was "to consider the relationship between education and social and economic development, a

better knowledge of which can contribute greatly to the efficacy of overall planning of education" and therefore its recommendations cover the many varied aspects of educational planning theory and practice within the context of global development planning.

3. The OAS Education Task Force^{13/}

The work of the Education Task Force, which spanned the period from January 1962 through January 1963, represents a first and valuable experiment in defining the bases for regional planning in Latin America. A good number of basic studies were made by the staff of the Task Force and supplemented by studies carried out by experts under contract to the Task Force in order to fill the many urgent needs in Latin American education. The Task Force Final Report will be presented to the Third Inter-American Meeting of Ministers of Education to be held in Bogota next month. It will undoubtedly provide valuable orientation to each of the countries involved in drawing up national plans for educational development.

4. Third Inter-American Meeting of Ministers of Education (August 1963)

This meeting will be the fourth (and final) phase of the educational planning process at the regional level. Guided by the Task Force Final Report, the participants will set the targets and standards to be reached by the various countries taking part in the Alliance for Progress program.

Major Findings and Conclusions of the OAS Education Task Force

The Introduction to the Final Report of the Education Task Force contains a summary description of three major priority zones which it

^{13/} Op. cit., background information on the OAS Education Task Force is contained in its Final Report, pp. 1-6.

considers essential to the overall development of education throughout the region. The main aspects of each of these are:

1. Training of teachers and administrative personnel.
2. Integrated planning of education and development of human resources.
3. Maximum effort to remove the bottleneck at the transition stage between primary education and secondary education, and extension and improvement of vocational training and technical education.

The report then goes on to discuss some socio-economic factors that influence the development of education in Latin America. First and foremost among these is the demographic factor, or what is more dramatically known as the "population explosion". Latin America has the world's highest rate of population growth. In 1960, the population total for the region stood at almost 200-million people. If the present 2.6 per cent annual rate of growth continues, by 1970 Latin America will have some 270-million inhabitants. But what is even more significant--at least for those of us concerned with education--is the fact that of those 200-million Latin Americans, 41.1 per cent were under 15 years of age. Of these nearly 25 per cent were between the ages of 5 and 14. This phenomena is a two-edged sword: the vitality and idealism of Latin America's young people can give a tremendous boost and meaning to the region's efforts to overcome the obstacles that stand in the way of its economic growth and social progress--but these same young people can further exacerbate the already acute social tensions if they are not given the educational skills and equipment they will need in order to live decently and become useful citizens.

Latin America's under-development stems mainly from the fact that almost 50 per cent of its inhabitants work in the agricultural sector which

continues to be the weakest of all and which is the most in need of wide-sweeping reforms. According to the Task Force Final Report, the agricultural sector, although employing almost 58 per cent of the total labour force, contributed only 25 per cent to the total GNP of the region in 1950; while the industrial sector, with only about one-third of the labour force, contributed slightly more than 25 per cent.^{14/}

The pattern of land ownership complicates the problem. In 1960, 1.5 per cent of the "fincas" were over 1,000 hectares and covered 65 per cent of cultivatable area in Latin America, while 73 per cent were small land-holdings of less than 20 hectares and covering only 4 per cent of the arable terrain with low productivity.

There has been a relatively rapid industrial growth in the last few years, with almost two-thirds of the industries producing goods for export in 1958.^{15/} In terms of GNP, the period between 1950 and 1957 was favourable, registering a growth rate of 4.9 per cent. But from 1957 to 1961, the GNP increased at only 1.2 per cent--taking into account the 2.6 per cent demographic increase--which is far below the net 2.5 per cent rate called for by the Charter of Punta del Este.^{16/} Price fluctuations on the

^{14/} CIES/OAS. Some highlights of Latin American Social Development. Document No. 11, Pan-American Union, 1962, Washington, D.C.

^{15/} OAS/ECLA. Socio-economic study of Latin America, Washington, 1961.

^{16/} Report of the Panel of Nine Experts to the Inter-American Economic and Social Council. OAS, Washington, 1962.

world market have been blamed as a major cause of this crisis (cf. footnote 16). However, in a recent report to the Inter-American Economic and Social Council, the Secretary-General of ECLA underlined the scarcity of qualified manpower and low social mobility as the real obstacles to economic development in Latin America. Other social factors that slow the pace of development are the uneven distribution of income and the rapid process of urbanization.

Pending completion of the 1960 censuses, ECLA estimates that in 1955 manpower was distributed as follows:

- agricultural: 30 million people, with an increase of 15 per cent over the preceding five-year period;
- industrial: about 11 million, with an increase of 35 per cent over the preceding five-year period; and
- in the services sector: about 18 million, with an increase of 49 per cent for the same period.

This over-development of the services sector can be traced partly to the mass exodus of people from rural areas seeking better living and working conditions which they believe exist in the urban areas, and partly to the abnormally high number of young people who abandon school in order to find work and contribute to the family income. Neither of these two groups--the rural migrants or the school drop-outs--have the skills or the minimum training that they need to find employment in the industrial sector. Therefore they inevitably wind up in one of the myriad enterprises, somewhat euphemistically and sometimes inaccurately included under the heading of "services". It is important to remember that because of the low income of most Latin American families, particularly rural families, their children enter the labour market at a very early age. This fact, together with the

sub-standard diets and nutrition, is mainly responsible for the high drop-out rate among primary school pupils. The region still has a high mortality rate from gastro-intestinal diseases. Recent experiments have shown that by providing school breakfasts or lunches, enrollment levels have increased, pupil performance has improved and the number of drop-outs has been considerably lowered.

Expansion and Improvement of Education & Training: Problems for the Educational Planner in Latin America

The following is a review of some of the more persistent and common problems that educational planners must deal with in Latin America.

- attention to extending primary education without a proportionate effort to raise its productivity. Only 17% of the first year enrollment complete the full cycle; 50% drop out during the first two years; poor pupil performance resulting in more than 30% repeaters; a high rate of absenteeism.
- indiscriminate extension of primary education has also created serious qualitative problems. An estimated 44% of the region's teaching personnel are unqualified; this figure fluctuates from a low of 22% in some countries to a high of 79% in others. Low standards prevail in most of the pre-service and in-service training programmes for teachers, and the low salaries offered to teachers (the monthly average in 14 countries is \$60) provide little incentive and cannot be expected to attract capable people to the teaching profession. So that it is not surprising that there is a serious shortage in qualified teachers; this deficit

has been estimated at 400,000 teachers needed over the next decade.

Teachers' salaries, low as they are, nevertheless represent 90% of current expenditures in primary education in Latin America.

- the shortage of textbooks and teaching aids, ignorance or lack of interest in modern teaching methods also.

When one takes all of these problems into account, it becomes clear that most of the figures on primary school enrollment - estimated in 1960 at 78.5% of the 32-million Latin American children of school age - are largely fictitious or of dubious value.

From the economic point of view, the investments in pupils who drop out of school after the first or second year, are clearly wasted. Therefore, one of the most urgent tasks for educational planners is to increase the holding power of schools. The economic return after the second school year increases in proportion to the number of years completed within a scale that L.A. educators insist should be a minimum of six years.

From the sociological point of view, many of these countries still maintain a double educational standard that discriminates against the rural populations. There are, in effect, two educational systems: the urban primary schools that offer the full primary education cycle of six years in general, have better-trained teachers, and generally receive preferential treatment in regard to textbooks, equipment, and buildings; and the rural primary schools which enroll only 22.5% of the school-age population as against 56% of the urban schools. The rural primary school frequently offers only two, three, and at the most four years of the primary cycle; they are usually ill-housed, badly located, and staffed by inexperienced teachers, of whom only 30% are qualified and who do not remain long in rural schools,

where there are practically no textbooks, teaching aids or equipment.

Most of the problems found at the primary level are also found at the secondary level. Generally speaking, of the very low percentage of pupils who complete primary education, an even lower percentage (15.7% of the corresponding school-age population) have the opportunity to enroll in secondary schools and only about 22% complete their studies at this level.

This seriously obstructs the educational process. No single Latin American country, even those that make the greatest effort, can claim to have produced enough secondary school graduates for the middle-level skilled occupations in the various sectors of the economy. In the past, secondary education was within reach only of children who were socially and economically more privileged, although since the end of the first world war there has been a marked trend towards democratizing opportunities at this educational level.

Vocational training schools as a whole badly need help to relate their programmes more closely to anticipated job opportunities. Generally speaking, vocational schools in Latin America have little prestige because of the traditional attitudes towards manual labour and class distinctions. By strengthening the content and quality of vocational education, this needed prestige can be gained and thus help to make vocational education a positive factor on which a country can draw for support in social and economic development planning. Nevertheless, the most important, the most urgent task in these countries is to diversify secondary-level education in terms of distribution of enrollment by branches and in terms of adjusting the curriculum to the present and future manpower needs. In 1960, the situation was as follows:

Agriculture branch, 1% of the secondary-level students;

Industrial branch 11%;

Teacher training 10%;

Business education 15%;

General secondary education (academic) 63%.

However, important efforts have been made in the meantime, such as the creation of institutions like SENAI in Brazil, SENA in Colombia, SENATI in Peru and INCE in Venezuela. But a persistent problem area continues to be agricultural vocational education, which needs to be more closely linked to the socio-economic realities of rural life and the consequences of land reform. It is discouraging to note that 85% of those who complete training in agricultural education find employment as civil servants. Business education schools are little more than secretarial schools and modern administration techniques have not yet been adopted. Only 30% of the teachers at this level have had specific training for teaching. The scarcity of qualified teachers for mathematics and the sciences is particularly acute.

Although higher education suffers many of the problems mentioned in connection with primary and secondary-level education, it has the advantage of a long and rich tradition.

In Latin America, the word "autonomous" is inherently associated with the university and is an attribute that is jealously guarded. However, autonomy does not always produce the degree of independence from political pressures that might be assumed. In one country, for example autonomy was decreed in 1927, suspended in 1930, restored in 1932, suppressed in 1940 and restored once more in 1944. Political upheaval frequently closes universities

for an extended period. Autonomy in many cases has proved to be an obstacle in the way of necessary correlation within the overall educational administration machinery.

The shortcomings of Latin American universities include an unclear concept of their mission, deficient administrative organization, scarcity of full-time instructors; insufficient laboratory and classroom equipment; weak research programs, and an uneven distribution of enrollment in the various disciplines. In 1960, only 3.1% of the corresponding school-age population were enrolled in L.A. universities. Of these, 18% were enrolled in engineering, 20% in law, 21% in medicine, and 28% in the social sciences and humanities. Only 20% of the students enrolled in universities completed their studies.

Adult education in spite of its obvious importance in social and economic development is often overlooked by L.A. countries. The type of adult education of direct concern to developing countries calls for a comprehensive approach including community development programs, literacy programmes, training schemes and other socio-economic programmes such as cooperatives, rural-industrial estates, etc. Only in this way can illiterate adults or those of low educational levels be absorbed into the economically-active population. Various literacy campaigns undertaken in the past have done little more than engender or aggravate social and individual frustrations; they have not supplied the vital needs of adults whose illiteracy is rooted in socio-economic causes and who very rightly seek first to improve their living standards. Isolated literacy campaigns in the long run have produced a large percentage of functional illiterates. The adult illiterate population is estimated at present at about 40% of the group age of more than 15 years old.

Highlights of the Task Force Conclusions

In spite of the complexity and scope of the problems it was asked to study, the Education Task force had to carry out its mandate within the short period of one year. The first step was to assemble all of the available data from both national and international sources so as to avoid duplicating research and studies done previously--this alone was time-consuming, and in some cases it was impossible--for example, the 1960 censuses and other statistical data for that year are not available yet. At the international level, the Task Force received the close cooperation of the various international organizations working in education, and related areas. UNESCO gave continuous and decisive support to the Task Force, as did other international and regional organizations and private foundations. The Government of the United States made every necessary contribution.

One of the first considerations of the Task Force was to fix the period for which it would set the educational targets to be achieved by Latin American countries. It was decided to make 1975 the target year since the present decade is already well advanced. It was also felt that the next two years would be taken up by many countries in carrying out basic reforms prior to embarking on a full-fledged program.

Another important consideration was the fact that--despite surface similarities and a unity of language, culture, history and religion--Latin America is a region of twenty countries spanning several different stages of political, social and economic development. The Task Force, however, had to arrive at a reasonable grouping of the countries. Based on a study

prepared at its request by the Institute for the study of Economic and Social Development^{17/} three main groups of countries were established:

Group I: Uruguay, Argentina, Venezuela and Chile

Group II: Panama, Costa Rica, Colombia, Mexico, Peru, Brazil, Paraguay, El Salvador, Bolivia, Nicaragua, Ecuador and the Dominican Republic.

Group III: Honduras, Guatemala and Haiti.

The Task Force carefully considered all the factors involved--demographic, financial, administrative, socio-economic, and pedagogic. They were then forced to conclude that the quantitative targets set forth in the Alliance Ten-Year Education Program, as well as the more detailed targets established by the Santiago Conference for the present decade, were far too ambitious if not impossible to achieve, even taking the most optimistic view of the capacity and resources of the countries and the assurance of external assistance. Two years have already elapsed since the Punta del Este meeting and one year since the Santiago Conference, thus reducing even further the likelihood of achieving these goals by 1970.

Table I (annexed) shows, on a comparative basis, the targets set by the Punta del Este Meeting, the Santiago Conference, and by the Education Task Force covering the three educational levels for 1965, 1970 and 1975. Tables II, III and IV taken from the Task Force Final Report and annexed to this statement, provide further details on targets for the three main groups of countries mentioned earlier. Table V (annexed) indicates the desired output for primary education. Table VI (annexed) indicates the order of magnitude

^{17/} OAS Task Force. Desarrollo de la educación en 19 países de A.L. (1960-1970). EDES of the University of Paris. 1962.

of the desirable trend of change in diversifying secondary education, with a target of 20 per cent increase every five years.

The Task Force Final Report further recommends a 20 per cent increase in the output of higher education over the next two five-year periods. It suggests that enrollment in higher education be diversified so that about 60 per cent of the university students are enrolled in technical and scientific fields, 15 per cent in the humanities and pedagogy, and 25 per cent in other fields in order to break away from the traditional enrollment pattern that over-emphasizes the liberal arts and professions. In 1954, approximately 57 per cent of university graduates received degrees in medicine and law, another large group had followed the liberal arts courses, and a mere 12 per cent had specialized in technical fields.^{18/}

Although no specific quantitative goals are given for adult education, the Task Force Final Report takes special pains to discuss the shortcomings of national "literacy" campaigns, not one of which has achieved what it set out to do. Pointing out the limitations and tremendous cost of literacy campaigns, the report goes on to recommend well-rounded programmes of community development closely linked to specific economic development projects.

The report also discussed at length the qualitative goals that must parallel quantitative targets. Among its many recommendations and suggestions a more global and harmonious development of the education system is high on the list. Specifically, the report calls for articulation and linking of the various levels and branches of education, more flexibility in curricula; elimination of discrimination between rural and urban education which has resulted in a primary school cycle of only two to four years for rural school-

^{18/} Source: "Ten Years of Training--Technical Cooperation through the OAS," Americas, April 1960, Pan-American Union, Washington, D.C.

children, while their urban counterparts get six years. Rural students also have inadequate facilities, textbooks, teachers, and so on. The report suggests that the secondary level be divided into two cycles of three years each, the first being common to all and the second differentiated. It is recommended that post-primary vocational training be provided up to four years and kept more within the framework of the educational system so as to provide students with the opportunity of continuing their studies in other branches if they show the desire and ability. Although institutions of higher education must intensify their efforts to turn out more graduates in technical and scientific fields, the Task Force Report stresses the basic role of higher education in continuing the general education begun in primary and secondary schools.

These are the main highlights of the Task Force conclusions and recommendations. Its report is a pioneer effort to provide Latin American countries with a comprehensive policy document which can guide not only the policy-makers but also the specialists directly concerned with educational planning in each country. It calls for the creation of manpower development boards to carry out surveys of present and future manpower needs, which would work in close cooperation with the educational planning units.

Separate chapters are devoted to financing and administration of education.

The Task Force carefully reviewed the estimates arrived at by the Santiago Conference and in the light of two basic studies prepared at its request by experts contracted for the purpose, the following conclusions were reached:

- that the region as a whole will not attain the goal set forth in the Santiago Declaration whereby Latin American countries would devote 4 per cent of their GNP to education budgets by 1965, although a substantial increase will most probably be registered.
- that it is preferable to base financial estimates on the assumption that there will be an average yearly increase of 10 per cent in education budgets, at constant prices. This would make it possible to achieve the quantitative targets suggested by the Task Force (see Tables VII and VIII, annexed).

In the chapter on Education Administration the Task Force Report stresses the importance of effective administration if any plan or programmes are to be adequately implemented. The facts are that:

The educational enterprise in Latin America is one of the largest sectors of national life. Huge sums are involved: in addition to the regular education budget, funds and other services are provided by other ministries, provincial, state, and local authorities and private sectors. In 1960 an estimated total of 1.646 million dollars was spent. If the present 10 per cent average yearly rate of increase is maintained, during this decade 29 million dollars will be used. In terms of personnel, educational services absorb the largest proportion of civil servants, which together with the students enrolled, represented in 1960 some 30 million people with 530 higher education institutions, 18,000 secondary schools of all types and 250,000 primary schools. Educational institutions are supposed to mould individuals and through them the societies in which they live, in terms of values and attitudes. It is perfectly valid to say that it is one of the main enterprises--if not the most important--of any nation.

In spite of this, however, the sad fact is that education and training in Latin America does not always attract the most qualified leaders, administrators or specialized personnel. Ministries of Education are all too often given to petty politics and intrigues and are not enough concerned with or versed in the value of the vast sums at their disposal, i.e., an awareness or concern for the economic returns on educational investments. It is therefore essential for those advising governments on educational planning, as it is for those directly involved in the planning process, to review the administrative structure and bring some order into its activities before embarking on the planning operation, and to ensure that suitable personnel are placed in charge of the plan's execution, that modern administrative procedures are established and that a rational organization of the entire structure is introduced. This situation calls therefore for ridding administrative superstructure of dead-wood--whether in terms of personnel or procedures--and sometimes to depart radically from cherished traditions.

Conclusion

To sum up this long and rather rambling statement, educational planning has still a long way to go in Latin America before it accomplishes all of the things that are expected of it.

Although there are still some gloomy aspects of the picture, it has to be recognized that the thinking in educational planning has moved ahead and that something practical is being done to solve the major problems encountered at the initial stage. Latin American countries are receiving financial and technical assistance from many institutions concerned with education and training for this promising enterprise. Thanks to a

relatively small group of dedicated people in Latin America, educational planning is coming of age. I believe that Latin America has successfully gone through the initial phase and gaining acceptance of educational planning coinciding with the Education Task Force work. It is now entering a new and more promising phase of implementation.

As someone has said - "There is nothing more powerful than an idea whose time has arrived". This is clearly the case for educational planning in Latin America.

RESOLUTION A.1

TEN-YEAR EDUCATION PROGRAM OF THE ALLIANCE FOR PROGRESS

WHEREAS:

The primary aim of education is the over-all development of each human being and, quite apart from its intrinsic value, the achievement of this aim is a decisive factor in a genuine economic and social development of peoples;

The low educational levels in Latin American countries are at the same time the result and the cause of their economic and social situation, and it is necessary to give educational services a vigorous impetus in order to break this vicious circle;

In recent years, Latin American countries have made considerable efforts to expand and improve their educational systems; however, their inadequacy is a serious obstacle to economic progress and social integration;

Under proper conditions, investments in education have the highest cultural, social and economic multiplier effect on national development;

It is essential to integrate educational development plans into the national development programs, in order to ensure the success of the Alliance for Progress and the maximum yield from the resources allocated to education;

The Organization of American States, through its services for education and scientific development, and the United Nations Educational, Scientific and Cultural Organization have encouraged a vigorous movement toward integral planning in education in the countries of Latin America, in accordance with the recommendations of the Second Inter-American Meeting of Ministers of Education; and

A Conference on Education and Economic and Social Development in Latin America, convoked by the United Nations Educational, Scientific and Cultural Organization, the Economic Commission for Latin America and the Organization of American States, will be held in Santiago, Chile, in December 1961, and the Third Inter-American Meeting of Ministers of Education will take place in June 1962, in Bogota, Colombia,

The Special Meeting of the Inter-American Economic and Social Council at the Ministerial Level

RECOMMENDS:

1. That each country adopt an over-all education plan for the attainment of precisely defined goals within the next ten years, for the purpose of raising the cultural level of the peoples of Latin America and fitting them to participate constructively in economic and social development.

2. That the following goals be adopted for the Alliance for Progress in the field of education, to be attained within the next ten years:

- a. At least six years of elementary education, free and compulsory, for the entire school-age population. This would represent an increase in primary school registration from approximately 26 million children in 1960 to some 45 million in 1970;
- b. Carrying out of systematic adult-education campaigns, directed toward community development, training of manpower, cultural extension and the eradication of illiteracy. In this manner it would be possible to bring over 50 million illiterate adults into minimum levels of effective participation in the cultural, social, and economic life of their countries;
- c. Reform and expansion of intermediate education so that a much higher proportion of the new generation may enjoy the opportunity to continue their general education and receive some type of high-quality vocational or pre-professional training. This will represent a considerable increase over the present enrollment in intermediate schools, which amounts to 3.2 million;
- d. Carrying out of studies to determine the varied needs for qualified manpower in industrial development, agrarian reform, agricultural development, social development programs and public administration at all levels, and establishment of emergency programs for accelerated training or education of such personnel;
- e. Reform, extension, and improvement of higher education so that a very much higher proportion of young people may have access to it. In this manner a substantial increase in enrollment at the universities, which at present numbers 500,000 students, will be achieved;
- f. Encouragement of the teaching of the sciences and of scientific and technological research, as well as intensification of the education and advanced training of scientists and science teachers;
- g. Intensification of the exchange of students, teachers, professors, research workers, and other specialists, in order to encourage mutual understanding and the maximum utilization of the available facilities for training and research;
- h. Development of public and school libraries as one of the most effective means of supplementing and strengthening education and of enriching and disseminating knowledge of the artistic and cultural heritage;
- i. Reorientation of the structure, content, and methods of education at all levels, to better adapt it to the advance of knowledge, to scientific and technological progress, to the cultural needs of Latin American countries, and to their social and economic development requirements;

- j. Establishment of scholarship programs and other forms of social and economic assistance to students, in order to reduce the practice of abandoning school, particularly in rural areas, and to ensure effective equality of opportunities for education at all levels; and
- k. Development and strengthening of national and regional centers for education and advanced training of teachers, professors and specialists in the various aspects of planning and administration of the educational services required to attain the foregoing goals.

3. That, to supplement available domestic resources to carry out the over-all plans for education, the Inter-American Fund for Social Development, the Inter-American Development Bank, and other sources of credit grant loans for well-conceived national and regional educational development projects, particularly those for school buildings and equipment.

4. That the Organization of American States, in cooperation with the specialized agencies of the United Nations concerned and other interested institutions provide technical assistance to countries that request it for the preparation, financing and execution of national plans and specific projects for the development of education.

5. That the Secretary General of the Organization of American States, in defining the mission of the Special Task Force on Education referred to in Resolution A.4, consider all the recommendations herein contained, and that the group carry out its activities in close cooperation with the appropriate national and international organizations.

6. That, with regard to the development of universities and scientific research, the conclusions and recommendations contained in the report to the Organization of American States by a group of experts about the needs in these fields, "Latin American Higher Education and Inter-American Cooperation" (Report and Recommendations), be carefully considered by the member states, the Secretary General of the Organization of American States, and the Special Task Force on Education.

7. That the Conference on Education, and Economic and Social Development in Latin America and the Third Inter-American Meeting of Ministers of Education devote special attention to the following tasks:
a) determining in specific detail the broad goals set forth in paragraph 2 of this resolution, b) setting priorities for the initial efforts, and
c) recommending the most appropriate practical means of attaining the proposed goals.

TABLE I

Comparative Educational Targets for Latin America

Year	<u>Latin American School-Age Population (in thousands)</u>			<u>Punte del Este Social Meeting Resolution A.1 Targets</u>			<u>Santiago Conference Targets in Enrollment Percentage</u>			<u>OAS Education Task Force Targets in Enrollment Percentage</u>		
	<u>Primary</u>	<u>Secondary</u>	<u>Higher</u>	<u>Primary</u>	<u>Secondary</u>	<u>Higher</u>	<u>Primary</u>	<u>Secondary</u>	<u>Higher</u>	<u>Primary</u>	<u>Secondary</u>	<u>Higher</u>
1960	31.697	24.396	16.466	78	15.7	3.1	78	15.7	3.1	78	15.7	3.1
1965	36.593	27.598	18.808	?	?	?	91	22	3.4	81	19.4	4
1970	41.598	32.543	21.693	100	Considerable increase	Considerable increase	100	34	4	95	31	5.2
1975	47.410	36.946	24.577	-	-	-	-	-	-	98	35	8.6

TABLE II

PRIMARY EDUCATION

<u>Group</u>	<u>Countries Covered</u>	<u>School-Age Population at this Educational Level (in thousands)</u>				<u>Enrollment Percentages of the Population of School Age</u>			
		<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>Actual</u>		<u>Targets</u>	
						<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>
I	4	6.144	6.796	7.416	8.180	88	100*	100*	100*
II	12	23.848	27.836	31.923	36.635	78	81	100*	100*
III	3	<u>1.705</u>	<u>1.961</u>	<u>2.259</u>	<u>2.595</u>	<u>43</u>	<u>56</u>	<u>70</u>	<u>89</u>
For the Region		<u>31.697</u>	<u>36.593</u>	<u>41.598</u>	<u>47.410</u>	<u>78</u>	<u>81</u>	<u>95</u>	<u>98</u>

* 100% enrollment of the school-age population is never reached in practice. In every academic course there is an accumulated school population of repeaters and students who were enrolled in the first course at an age of more than seven years. This accumulated school population, pedagogically speaking, is not enrolled in its corresponding course, and should not be higher than 5% of the total enrollment in each course.

TABLE III

SECONDARY EDUCATION

<u>Group</u>	<u>Countries Covered</u>	<u>School-Age Population at this Educational Level (in thousands)</u>				<u>Enrollment Percentages of the Population of School Age</u>			
		<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>	<u>Actual</u>		<u>Targets</u>	
						<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>
I	4	3.989	4.471	5.032	5.533	33	40	65	67
II	12	19.200	21.759	25.937	29.616	13	16	26	32
III	3	<u>1.207</u>	<u>1.368</u>	<u>1.574</u>	<u>1.797</u>	<u>5</u>	<u>6</u>	<u>8</u>	<u>10</u>
For the Region		<u>24.396</u>	<u>27.598</u>	<u>32.543</u>	<u>36.946</u>	<u>15.7</u>	<u>19.4</u>	<u>31</u>	<u>35</u>

Diversion of the Secondary Education Level, Second Cycle

Percentages of the Total
Enrollment Figure

TABLE IV

Groups	Countries Covered	Higher Education				Enrollment in Percentages of the Population of School Age			
		1960	1965	1970	1975	Actual 1960	Targets 1965	Targets 1970	Targets 1975
I	4	3.041	3.393	3.901	4.256	8	9	11	14
II	12	12.569	14.443	16.709	19.088	2	3	4	8
III	3	856	969	1.083	1.233	1	1.5	2.5	4
For the Region		16.466	18.808	21.693	24.577	3.1	4	5.2	8.6

TABLE V

Targets for Primary Education Output

Courses	Group I				Group II				Group III			
	1960	1965	1970	1975	1960	1965	1970	1975	1960	1965	1970	1975
VI	30	40	60	70	6	30	50	60	7	20	30	50
V	37				5				9			
IV	46				22				13			
III	56				33				21			
II	67				49				34			
I	100	100	100	100	100	100	100	100	100	100	100	100

Source: Rosenfeld-Roban, The Review of Economic and Statistics, May 1961, Vol. XIII, No. 2, Table A-1.

TABLE VI

Diversification of the Secondary Education Level, Second Cycle

Branches of Secondary Education	Percentages of the Total Enrollment Figure			
	1960	1965	1970	1975
Agriculture	1	3	7	12
Industrial*	11	15	20	28
Teacher Training	10	12	14	16
Business Education	15	15	14	14
Secondary General (Academic)	63	55	45	30

*Includes vocational education for women.

TABLE VII

Estimated Increases in Expenditures for Education
and Percentages of GNP for Education
(in millions of dollars)

Year	Expenditures for Education					
	10% Annual Increase	Every Five Years	Hypothesis I		Hypothesis II	
			GNP	Increase	GNP	Increase*
1960	1.646		57.849		57.849	
1961	1.811		60.741	5%	60.162	4%
1962	1.992		63.778		62.568	
1963	2.191		66.967		65.071	
1964	2.410		70.315		60.674	
1965	2.651	11.055	73.831	5%	70.381	4.3%
1966	2.916		77.522		73.407	
1967	3.208		81.398		76.564	
1968	3.529		85.468		78.856	
1969	3.882		89.741		83.290	
1970	4.270	17.865	94.228	5%	86.871	5%
1971	4.697		98.939		91.215	
1972	5.167		103.886		95.776	
1973	5.684		109.080		100.565	
1974	6.252		114.534		105.593	
1975	6.877	28.677	120.261		110.873	

* Source: Rosenstein-Rodan, The Review of Economics and Statistics, May 1961, Vol. XLIII, No. 2, Table a-A-1.

Estimate of the Cost of Education in Latin America*
(Based on Unit Costs Established in the Studies
Prepared for the Task Force)

Expenditures in...	<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>
Primary Education				
Students	24.794	29.640	39.518	46.462
Unit Cost (US\$25)				
Total Current Expenditure	886	741	988	1.162
Secondary Education				
Students	3.837	5.354	10.088	13.227
Unit Cost (US\$122)				
Total Current Expenditure	502	653	1.231	1.614
Higher Education				
Students	519	752	1.128	2.114
Unit Cost (US\$436)				
Total Current Expenditure	258	328	492	922

Current Expenditure by Five-Year Periods

Expenditure in...	<u>1961-1965</u>	<u>1966-1970</u>	<u>1971-1975</u>
Primary Education	4.070	4.325	5.375
Secondary Education	2.890	4.710	7.115
Higher Education	<u>1.465</u>	<u>2.050</u>	<u>3.535</u>
Total Current Expenditure	<u>8.425</u>	<u>11.085</u>	<u>16.025</u>

Capital Expenditure by Five-Year Periods

Primary Education			
New Student Enrollment	4.846	9.878	6.944
Unit Cost (US\$55)			
Total Cost	267	543	382
Secondary Education			
New Student Enrollment	1.517	4.734	3.139
Unit Cost (US\$200)			
Total Cost	303	947	628
Higher Education			
New Student Enrollment	233	376	986
Unit Cost (US\$800)			
Total Cost	<u>186</u>	<u>301</u>	<u>789</u>
Total Capital Expenditure	<u>756</u>	<u>1.791</u>	<u>1.799</u>
Grand Total of Current			
Capital Expenditure	9.181	12.876	17.824
Pedagogical Research	92	129	178
Adult Education	<u>276</u>	<u>645</u>	<u>1.782</u>
Grand Total	<u>9.549</u>	<u>13.650</u>	<u>19.784</u>

* Number of students and new enrollments in thousands; unit costs in dollars; current expenditures, capital investment and total expenditures in millions of dollars.

Item 291 - blue selected readings
(see also full paper)

INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
INTERNATIONAL DEVELOPMENT ASSOCIATION

Report on the International Conference on
Educational Planning in Developing Countries
(Berlin-Tegel, July 1 - 6, 1963)

R. Diez-Hochleitner



The International Conference on Educational Planning in Developing Countries was devoted to discussions of the theory and practice of educational planning. The present status of knowledge in this field was reviewed, on an interdisciplinary approach. The value of the discussions was enhanced by being based on a large number of case studies from European, Asian, African and Latin American countries introduced by some forty top level educators, economists, sociologists and administrators (a list of participants is attached) gathered from all over the world for this Conference. It was convened by the German Foundation for Developing Countries (Deutsche Stiftung fuer Entwicklungslaender) of which Dr. G. Brand is the Director General (Kurator).

The purpose of the Conference was two-fold: 1) to provide specialists of donor countries and of various organizations, as well as top level officials from developing countries in charge of educational planning, a forum for advancing the knowledge of and devising practical solutions to educational development problems related to economic and social plans; and 2) to provide the German authorities with information needed for their own efforts to plan the development of education, particularly higher education, in the Federal Republic of Germany.

The program (copy attached) included a discussion of educational planning theory in general; the Mediterranean Regional Project and the EIP Project, both from OECD; a regional approach for educational planning in Latin America; an evaluation of experiences of educational planning in Africa and Asia; discussions on the educational planning efforts in Ethiopia, Greece, India, Morocco, Niger, Nigeria, Pakistan, Tanganyika, Tunisia, Sudan and Sweden. There was an interesting round-table discussion on the problems of external aid for educational planning and on the merit of expanding educational systems versus improving the existing ones. Prof. F. Edding, from the International Research Center in Frankfurt, acted as Director of Discussions.

I introduced the discussion on the theory of educational planning and submitted the attached paper, "Educational Planning," which is the draft text of a forthcoming manual to be published by UNESCO. A draft chapter from the manual by Mr. Phillips of UNESCO was also submitted to the Conference, although the author was unable to be present.

During the discussion, a number of general suggestions to improve educational planning were made. It was recommended that a complete collection of existing educational plans, from all over the world, should be established. It was felt that improvements in forecasting educational needs would be encouraged by efforts to make statistical techniques of various disciplines comparable. A strong wish was also expressed for a clarification and agreement on terminology.

It was suggested that a permanent institution be established for analyzing factors that influence educational planning. This institution would maintain constant supervision of progress in educational development so as to allow for flexible and continuous planning. Special attention would be paid to reforms in planning arrangements: an example was offered of an administrative reform which took into account the institutional prerequisites for dynamic planning.

There was substantial agreement on a number of planning concepts:

1. Educational planning should mean long-term and short-term planning and should cover both education in general as well as training of skilled labor.
2. The main aim of educational planning should be socio-economic development.
3. Education means not only the passing on of knowledge, but also the development of the individual human being and society in all aspects.
4. The social minimum demand for education should be met as a matter of necessity.
5. Planning should be understood as integrated and comprehensive transformation of educational structures.
6. There is need for an interdisciplinary approach to educational planning.
7. Educational planning should be based on a comprehensive approach, applying the whole variety of techniques, instruments and methods.
8. The importance of the "social method" was emphasized, but not considered to be planning in the proper sense.
9. "Education-output" ratios were considered to have limited application as a practical measure because of the lack of complete statistical data in developing countries.
10. Decision-making should be reserved to national planning bodies; the role of the expert should be confined to consultative and critical evaluations.

At the same time, there was controversy concerning a number of concepts. Different points of view were expressed about the "neutrality"-- in terms of personal involvement--of planning and planning techniques. The consensus was that planning could not be conceived without value judgments related to an existing social context and given situation. Thus planning implies normative decisions. However, there was no agreement whether there were no neutral planning techniques or whether every planning technique had a normative element once it was actually applied.

The "manpower approach" also turned out to be a controversial topic. Some delegates felt the manpower approach had been overestimated, that it should be confined mainly for short-term and medium-term planning. Others felt this approach can be used for long-term planning, too.

The question of "quality versus quantity" brought out arguments on both sides. A case for the priority of quality was advanced where the highest standards of education are lacking; it was felt real progress would be made impossible by education of a lower standard because it leads inevitably to a vicious circle. Investment in education promises considerable returns only if the education is of sufficiently high standard. The most important point in favor of quantity determining education policy was the argument of a fundamental right of human beings to education.

Many of the practical problems of planning were aired at the Conference:

1. The necessity of establishing a priority ladder in the formation of high-level manpower. A related question is whether national and cultural goals should have an eventual priority over economic needs.
2. The question of personal freedom in relation to professional and vocational guidance. This point was tackled by the XXVI International Conference on Public Education held in Geneva which I attended (7-12 July); this Conference recommended unanimously that personal freedom should be paramount. A somewhat related problem is involved in selection and recruitment; e.g. the dangers of testing children at an early age when the child's social background dominates other factors.
3. The prerequisites of planning, e.g. the necessity of changing neutral structures, i.e. the so-called "planning for planning." Also, the difficulties of cooperation and coordination between central and local planning bodies were explored.
4. The ambivalence between demands represented by organized interest groups and needs resulting from a comprehensive approach; the gap between long-term planning and present popular pressure.

The Conference gave strong support to the idea of preparing the ground for educational planning by psychological endeavors. It was recommended that in newly independent countries a preliminary period of preparation should be provided for. It is only after this period, during which statistics do not play a decisive role, that proper educational planning can start. It was felt a distinction should be made between professional and public opinion. A more thorough approach would be needed in the case of educational experts, while a general explanation should be sufficient for the general public. To exert a lasting influence on the rural population, the important role of local opinion leaders should be taken into account. Special efforts should be made to communicate with civil servants of the administration of finance. The public can be made familiar with educational planning by three techniques: information, motivation, and inducing participation. It was generally declared that the best approach to convincing people is to present things as they are.

In accordance with the agenda, I later introduced my paper on "Educational Planning in Latin America: A Regional Approach" (attached). This was followed by a discussion on regional planning as a point of departure for more effective national educational planning efforts and as a guiding framework for national goals. Discussion revolved around the degree of maturity in this field in the various regions. The work of the OAS Task Force was commended and the advisability of similar efforts on a multinational basis considered.

The new OECD project for more advanced European countries--the so-called EIP scheme--was discussed. It represents a very sophisticated blend of the manpower approach with a cultural approach in educational development. This project, now being started, follows the successful experience of the Mediterranean Regional Project which is nearing completion.

The Conference provided a good opportunity for those in charge of National Educational Planning bodies to realize the complexity of the task and the possibilities of this challenging field. The educational plans of a number of present and prospective Bank clients were discussed, including Ethiopia, Morocco, Nigeria, Pakistan, Tanganyika and Tunisia. This gave me an opportunity to find out more about their problems and for them to realize the interest of the Bank/IDA in educational planning. During the discussion of various cases, specific questions were directed to me on Bank/IDA activities and problems in financing educational projects.

The Conference avoided setting out a new set of recommendations of a general nature. It was realized that specific recommendations can only be given on a country basis. Thus, the Conference set up a Drafting Committee, on which I sat, to produce a single final document (attached) with a list of suggested items which calls for studies, investigations and research work in the field of educational planning. This document was meant particularly as a contribution to the newly established International Institute for Educational Planning. At the request of the Chairman and as suggested by Dr. Beker, a member of the Board, (who also participated at the Berlin Meeting) it was my privilege to present this paper to the Board of the International Institute, when accompanying Mr. Demuth to its first meeting.

All documents presented to the Conference, as well as summary minutes of the discussions, will be published in book form by the German Foundation for Developing Countries. Editions will be in English, French and German, and publication is expected by the end of this year.

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UNESCO CONFERENCE OF AFRICAN MINISTERS OF EDUCATION - ABIDJAN, 17-24 MARCH 1964

Statement by the Representative of the World Bank and IDA,

Mr. R. Diez-Hochleitner



This Conference, Mr. Chairman, is in itself a witness to the strength of purpose and the determined response to the educational needs of Africa, by African leadership. For this reason, we could not fail to accept the invitation to participate in it and, on behalf of Mr. Woods, the President of the International Bank for Reconstruction and Development and its affiliate the International Development Association (IDA), I wish to convey to you his warm greetings and best wishes for the success of the Conference.

This, is an appropriate moment for reflection on the magnitude of the educational task which still lies ahead in Africa, and to further determine specific solutions to the problems in hand. We have to take stock of the justifiable and desirable educational goals and at the same time be realistic in terms of the available means, particularly in terms of trained personnel and financial resources. This is a responsibility, Mr. Chairman, which all of us here present share. This struggle we face between aims and means might be best symbolized by Don Quixote and Sancho Panza. I hope that Sancho Panza will more and more be up to his Master's ideals. These are the ideals to which the Director-General of UNESCO referred in his opening speech.

The Bank and IDA's announcement of its readiness to examine proposals for educational development is a relatively recent event but has already borne fruit.

As part of its first undertakings, IDA has made credits available to Tunisia and to Tanganyika for secondary school construction. Other projects for educational loans and credits are under active and advanced consideration within the Bank and IDA. It is noteworthy that coincidental with the Tunisia IDA Credit, the Bank also granted a sum for the engagement of research architects and school administrators to devise school building standards for Tunisia, so that maximum economy and efficiency could be introduced in future school building expenditures in that country. Furthermore, the Bank has cooperated with UNESCO in establishing an International Institute of Educational Planning to develop and supply educational planning techniques and methods to developing countries.

The Bank and IDA will continue to consider financing a part of the capital requirements of priority education projects designed to produce, or to serve as a necessary step in producing, trained personnel of the kind and in the numbers needed to forward economic development in the Member country concerned: the emphasis being put on economic factors because of the nature of the Bank and IDA's function, but without disregarding other major roles of education. In applying this criterion, although other types of education projects might be considered in exceptional cases, the Bank and IDA will give their attention, to projects in the field of:

- a) vocational and technical education and training at various levels, and
- b) general secondary education.

General Bank and IDA policies regarding the type of goods and services to be financed will apply to the financing of education projects. Normally only capital expenditures, for austere school buildings and equipment, will be financed, but the receiving country will be expected to contribute a proportion of the capital cost of the project. However, where operating expenditures of an extraordinary character are necessary for a limited period to launch a project (for example, the employment for a few years of expatriate teachers at the start of a new programme to get it under way and to train local teachers to carry it on), the Bank and IDA might in some cases regard those expenditures as an integral part of the project and include them within the scope of a loan or credit. On the other hand, Bank and IDA financing will not normally extend to those capital expenditures in the education field which are of recurrent character and therefore comparable to current costs, such as funds for the "normal" annual expansion of school facilities required for a constantly growing school-age population.

The Director General of UNESCO has said that the key of UNESCO's educational programme in Africa is the planning of education and training. In line with this fruitful initiative and major activity of UNESCO, the Bank and IDA would wish to be satisfied in each case that a project has a high priority and preferably that it contributes to or is part of a comprehensive, well balanced, and practical plan for the development of education and training and that necessary steps are being taken to make the educational system both effective and efficient. Not the least of the reasons for this criteria is that only a balanced educational system will produce the desired and desirable goal of universal primary education on a continuing basis without the risk of the consequences to the economy of serious imbalance.

The urge for education now underway all over the world and particularly in Africa represents a major challenge to everyone concerned. The institutional structures now being designed and established will have long and lasting implications. The allocation of resources amongst the various levels of education will impose different cost burdens on the economy and produce different manpower skills for the economy and the countries' social development. The question is not the will or determination to tackle the vast educational problem but the ability of the new states to finance and staff dramatically enlarged and diversified educational systems.

Your hospitable and promiseful country, Mr. Chairman, deserves indeed to be witness of the results of this Conference which, I am sure, will contribute substantially to the further and rapid development of Africa.

From "Problems and Strategies of Educational Planning. Lessons from Latin America." Edited by Raymond F. Lyons. Published by Unesco: International Institute for Educational Planning, Paris, 1965. IIEP 65/D.1/A. \$3; 15/-(stg.); 10.50 F. This volume contains most significant papers selected from 49 written contributions and major oral statements presented at a five-week seminar organized by the International Institute for Educational Planning in Paris in April-May 1964. All the documents submitted to the seminar can be consulted in the library of the Institute.

A Regional Overview

Ricardo Diez-Hochleitner
Chief, Education Division, International Bank for Reconstruction and Development



Chronology of Events

The idea of educational planning in Latin America was first recommended at the regional level, during the Second Inter-American Meeting of Ministers of Education in Lima in 1956.¹ The resolution adopted was an attempt to introduce educational planning at a time when economic planning was being rather cautiously accepted in Latin America. Thus, in a good many cases, the idea of educational planning preceded that of economic planning and to a certain extent even contributed to better understanding and a more positive attitude towards it. The recommendation at the Lima meeting was especially noteworthy because it insisted on the necessity for overall planning of education as distinct from partial planning of certain levels or branches of the educational system which had been attempted in many countries. It also called for a realistic adaptation of educational plans to the social and economic needs of each country, thus introducing the principle of co-ordination between educational planning and economic planning. However, in the absence of knowledge and concrete experience, the resolution remained hardly more than an expression of good intentions.

The first practical step was taken by Colombia which, one month later, established an Educational Planning Office in the Ministry of Education. This office immediately began work on a first five-year plan, a draft of which was published in June 1957.² However, the planning office encountered difficulties due to the absence of a social and economic frame of reference, since the economic planning unit was still in an embryonic state. Subsequently, chronic political and administrative instability did not allow any systematic implementation of planning.

Nevertheless, this first concrete experience in Latin America generated wide interest among educational leaders within and outside the region. Responding to a recommendation of the Lima meeting, the Pan-American Union decided in 1957 to organize an inter-American seminar on the overall

1. *Proceedings of the Second Inter-American Meeting of Ministers of Education. Lima, Peru, 1956.* (Pan-American Union, Washington, D.C., 1957. Original in Spanish).

2. See Ricardo Diez-Hochleitner "Une expérience pilote en Colombie: la planification intégrale de l'éducation depuis 1956". (A pilot experiment in Colombia: integral educational planning since 1956). *Développement et civilisations* (Paris, IRFED, No. 5, January 1961), pp. 67-76.

planning of education.¹ By the end of the same year, the ninth session of the General Conference of Unesco, held in New Delhi, approved the launching of a Major Project for the Extension and Improvement of Primary Education in Latin America. This was to be carried out over a period of ten years by the systematic planning of education with a view to ensuring a more balanced approach to primary education.

The Inter-American Seminar on the Overall Planning of Education was held in Washington in June 1958 under the joint auspices of the OAS and Unesco. It stressed the necessity of integrating educational planning into social and economic planning and recommended the establishment of technical offices to perform this task in close co-operation with the national agencies responsible for economic and social planning. The recommendations of the seminar bore broadly on the principles, methods and techniques of educational planning as well as on the particular aspects of each educational level² and drew heavily on the Colombian pilot experience. The conclusions reached by the seminar are still valid today.

As a result of the rapid and wide acceptance of the idea of educational planning, Unesco was literally flooded by requests for technical assistance in this field. Since 1959, most of the Latin American countries have been provided with experts in educational planning under the United Nations Technical Assistance Programme. In addition, a Unesco regional team, consisting of three experts—in educational statistics, financing, and administration—was made available to Latin American Member States under the Unesco Major Project mentioned earlier, and local counterparts were assigned to work closely with this team in order to train national senior staff.

In 1959, the first Inter-American Training Course on Overall Educational Planning was organized in Bogotá, Colombia, by the OAS in collaboration with Unesco and the Government of Colombia.³ Thirty-three fellows from nineteen Latin American countries, most of them high-level officials of education ministries, attended this course. Similar courses have been organized since at the national level in several countries. Also study tours organized under the auspices of Unesco outside the region have enabled officials from Latin American ministries of education to study the problems, techniques and experience of other countries.

In view of the ever increasing need for experts in educational planning and in response to an urgent recommendation of the OAS Education Task Force,⁴ Unesco, in collaboration with ILO and AID, organized a second Regional Training Course in Educational Planning at the Latin American

1. See vol. I, chapter 2.23 (5) "Methodology of Planning" of the *Informe del Proyecto para el Primer Plan Quinquenal* (Report of the Project for the first Five-Year Plan). (Ministerio de Educación Nacional, Oficina de Planeamiento, Bogotá, 1957, 5 vol.); also "Mechanics of Planning", a working paper presented to the Inter-American Seminar on Overall Educational Planning, 1958, which departs from the Colombian methodology, in *Documentos de trabajo* (Working papers). (Unesco/OAS Pan-American Union, Washington, D.C., 1959, 5 vol.); also "Elements of Educational Planning", in *Educational Studies and Documents*. No. 45 (Unesco, Paris, 1963).

2. Detailed information on the seminar and its recommendations was published in a special issue of *La Educación*, No. 11, July-September 1958 (Pan-American Union, Washington, D.C.).

3. For details regarding this course, see "Curso de Bogotá sobre Planeamiento de la Educación" (Bogotá course on educational planning). *La Educación*, No. 17, pp. 3-63 (Pan-American Union, Washington, D.C.).

4. OAS Education Task Force. *Projects for Immediate Action* (Washington, D.C., February 1962).

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Institute for Economic and Social Planning in Santiago, Chile.¹ This three-month course was attended by twenty-nine officials from fifteen Latin American countries. In May 1963, Unesco and the United Nations Economic Commission for Latin America, which is the sponsoring agency for the Santiago Institute, agreed to establish within the Institute a permanent educational planning branch to carry out in-service training together with research work and provide advisory services to the countries of the region.

Another development which should be mentioned in connection with educational planning in Latin America is the Special Meeting of the Inter-American Economic and Social Council which met at the ministerial level in Punta del Este, Uruguay, in August 1961. One of the resolutions annexed to the Punta del Este Charter (resolution A.1) urged each country to adopt an overall educational plan for the attainment of precisely defined goals within the next ten years and for the purpose of raising the cultural level of the peoples, and outlined a seven-point programme for educational development.

This resolution was one of the main items of the Conference on Education and Economic and Social Development in Latin America which was held in March 1962 in Santiago, Chile, under the sponsorship of Unesco, ECLA, OAS, ILO, and FAO. The Conference made a searching reappraisal of the first attempts at educational planning in Latin America, reaffirmed the necessity of linking educational planning to economic and social planning, stressed the importance of manpower surveys as a basis for working out priorities for educational development, and suggested quantitative regional targets for each educational level during the coming decade.² On the basis of rough cost estimates, the "Santiago Declaration" asked Latin American countries to devote an additional one per cent of their Gross National Product to education every five years, starting in 1965.

The OAS Education Task Force also gives very high priority to educational planning in its Final Report;³ it called for action at an early stage under its Projects for Immediate Action, which were later endorsed by the Santiago Conference. This completes the chronological account of the evolution of educational planning in Latin America.

In this chronology of events, one can distinguish four major phases as far as the regional approach to educational planning is concerned. The first was the Punta del Este Meeting, which marked a turning point in the history of the Western Hemisphere. After many years of frustration and under the rising pressure of social tensions, the American Republics agreed to a concerted attack on economic and social problems, and at the same time recognized that education is a prerequisite for economic and social development. Hence the resolution A.1.

The second phase started with the Santiago Conference, which took up this resolution, studied the goals defined in it and formulated them more precisely, particularly in connection with economic and social development, and endorsed a series of projects for immediate action prepared by the OAS

1. A report on the course was published by Unesco under the title "Curso de capacitación en planeamiento de la educación, 1962. Informe del Director y de los Co-directores" (Qualifying course on Educational Planning, 1962. Report of the Director and Co-Directors).

2. *Report of the Conference on Education and Economic and Social Development in Latin America* (Santiago, March 1962), Unesco, ECLA, OAS, ILO, FAO.

3. "Perspectivas del desarrollo de la educación en América Latina" (Perspectives of educational development in Latin America). OAS-Alliance for Progress, *Final Report of the OAS Task Force on Education* (Washington, D.C., 1963).

Education Task Force. The third phase started with the work of the OAS Education Task Force which spanned the period from January 1962 to January 1963 and represented a first experiment in defining the bases for regional planning in Latin America. The result of this work was the Final Report which provided orientation to each of the countries concerned in drawing up its national plan for educational development.

The fourth and final phase was the endorsement of this Final Report by the Third Inter-American Meeting of Ministers of Education held in Bogotá in August 1963. Guided by the Final Report, the participants suggested the standards and targets to be reached by the various countries taking part in the programme of the Alliance for Progress.

Major Conclusions of the OAS Education Task Force

The three major priority objectives considered by the OAS Education Task Force as essential to the development of education throughout the region are:

1. The training of teachers and of administrative personnel;
2. Planning of education with a view to developing manpower resources;
3. Removing the bottleneck at the transition stage between primary and secondary education, and extending and improving vocational training and technical education.

The year 1975 was made the target year for the educational plans of the Latin American countries, since it was felt that two years at least would be needed by many countries to carry out basic reforms prior to embarking on a full-fledged educational programme. It was also felt that, despite surface similarities, the twenty countries of the region were at different stages of political, social and economic development and that for the purposes of planning a reasonable grouping of the countries was essential. On the basis of a study made at the request of the OAS Task Force by the Institute for Economic and Social Development Studies of Paris, the nineteen countries (Cuba excepted) were divided into three groups as follows.

Group I: Argentina, Chile, Uruguay, Venezuela.

Group II: Bolivia, Brazil, Colombia, Costa Rica, the Dominican Republic, Ecuador, El Salvador, Mexico, Nicaragua, Panama, Paraguay, Peru.

Group III: Guatemala, Haiti, Honduras.

The Task Force, after considering all the factors involved, was forced to conclude that the quantitative targets established by the Punta del Este resolution as well as the more detailed targets of the Santiago Conference for the present decade were far too ambitious if not impossible to achieve, particularly at the primary and secondary levels.

As far as higher education is concerned, the Task Force recommended a 20 per cent increase in output over the next two five-year periods, and suggested that about 60 per cent of the students should be enrolled at technical and scientific faculties, 15 per cent in humanities and pedagogy, and 25 per cent at the other faculties, in order to break away from the traditional pattern which over-emphasizes the professions and liberal arts.

Although no specific targets were set for adult education, the Task Force pointed to the shortcomings, limitations and tremendous cost of national

literacy campaigns, not one of which achieved what it set out to do, and recommended well-rounded programmes of community development closely linked to specific economic development projects. Among the qualitative goals, the Task Force called specifically for a better articulation between the various levels and branches of education; more flexibility in curricula; abolition of the discrimination against rural education; the division of secondary education into two cycles of three years each, the first being common to all pupils and the second differentiated; and for post-primary vocational training of up to four years within the formal educational system.

The Task Force, after reviewing the financial estimates of the Santiago Conference, concluded, in the light of two studies specially prepared at their request, that the region as a whole will not reach the goal of 4 per cent of GNP allotted to education by 1965, and that it is preferable to base financial estimates on the assumption of a yearly increase of 10 per cent in constant prices of the education budgets. Such an increase would make it possible to achieve the targets suggested by the Task Force.

In view of the fact that, in terms of personnel and spending, education is one of the largest, if not the largest, sectors in most Latin American countries, its administrative structure and the quality of its personnel would seem of prime importance. In the opinion of the Task Force, both leave much to be desired, and a radical improvement in the whole administrative structure and its personnel would have to be effected before any of the countries could embark on serious educational planning.

Conclusion

In spite of a broad acceptance of the need for educational planning and laudable efforts to carry it out, little progress has been made in the implementation of programmes advocated so consistently in the meetings and conferences of Latin American leaders. Lack of trained personnel to operate national planning offices, weak administration, fear of and resistance to change on the part of vested interests, political instability which implies a change of personnel as well as policies with every change of government, a lack of continuity in policies and their execution, have been among the main obstacles to effective educational planning in Latin America.

Yet, in spite of these negative aspects, the picture is not altogether gloomy. The thinking in educational planning is moving ahead, and practical efforts are being made to solve the major problems encountered so far. Educational planning in Latin America seems to be at a stage which, in the words of a famous statesman, may mark the end of the beginning in the efforts to build an educational structure commensurate with the needs of a modern economy.