

The Bellagio Initiative

The Future of Philanthropy and Development in
the Pursuit of Human Wellbeing

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Corporate Philanthropy and the 'Education For All' Agenda

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Introduction

There is no shortage of candidates for inclusion in a list of challenges facing humanity at the start of the twenty-first century. Over the past two decades, globalisation has contributed to impressive gains in poverty reduction. Yet we live in a world of unprecedented disparities in wealth. Progress towards the international development goals in areas such as poverty reduction, nutrition, child survival and maternal health has fallen far short of the targets set for 2015, even in many of the countries that have secured high economic growth. Youth unemployment has reached record levels. While global economic integration and the spread of technology, capital and ideas have increased prosperity, growth has been uneven and unbalanced. Building a new globalisation will require not just new mechanisms for curtailing the power of financial markets, but also a more equitable pattern of economic growth and a new approach to ecology. Climate change and the growing body of evidence on environmental stress point unequivocally towards an economic system that has overstepped the ecological boundaries, with potentially devastating consequences for future generations.

So why put education on an already overcrowded agenda? Partly because education is a fundamental human right, but also because without progress in education any attempt to address the wider challenges facing governments around the world will be in vain. In an increasingly knowledge-based world economy, deep disparities between nations in education will reinforce an unequal and unsustainable pattern of globalisation. Education inequalities within countries will similarly reinforce social and economic fault lines. And without improved education there is little prospect of humanity confronting the technological and social challenges posed by the global ecological crisis.

The Rockefeller-IDS series specifically identifies 'human wellbeing' as the focal point for analysis. 'Wellbeing' is a currency that has been somewhat debased in recent years. Vaguely delineated and often highly subjective notions of human welfare have been seized upon by a broad array of actors of all political persuasions and converted into populist exercises and pronouncements often devoid of political content. Power relationships and the policies that reinforce inequality and cycles of marginalisation seldom figure with any prominence. The Sarkozy report is one recent and high-profile example of this tendency (Report of the Sarkozy Commission 2009). Yet if human wellbeing has substantive meaning, then education is surely one of its most vital components. Learning not only enriches life but also empowers people to secure their entitlements, expand their choices, and participate more equitably in the social, economic and political lives of their countries and communities. It is at the heart of what Amartya Sen describes as the capabilities and 'substantive freedoms' that enable people to pursue goals that they value (Sen 2009). It follows that the distribution of opportunities for education has a profound bearing on the distribution and institutionalisation of power within families, communities and wider society, and on what has been identified as the ultimate measure of wellbeing – namely, 'living well together' (Deneulin and McGregor 2010). While the distinction between the wellbeing perspective and the capabilities approach can be debated, it is surely evident that no society, be it local,

national or global, can flourish when many of its members face deeply entrenched disadvantages in accessing opportunities for education of decent quality.

The limits to corporate philanthropy

Against this backdrop, education might be seen as a natural focal point for philanthropy at the start of the twenty-first century. In fact education has been something of a sub-theme.

Over the past decade or so, corporate philanthropists, philanthropic foundations, and companies have transformed many areas of international development. They provide finance, technology and materials to a bewildering array of initiatives, often operating on a scale comparable to traditional donors (Martin and Witte 2008; DECPG 2006). They also influence ideas and approaches to development assistance. Nowhere is the impact more evident than in global health. By contrast, the corporate philanthropic effort in education is limited, fragmented, weakly aligned to national and international development goals, and largely ineffective.

Comparisons between health and education are striking. Over the past two decades corporate philanthropy has changed the face of international cooperation in health. Today, individual philanthropists and their foundations provide more finance than all but a handful of aid donors. They participate in the governance of global funds, commission research, and fund UN agencies and non-governmental organisations (NGOs). Pharmaceutical companies provide life-saving drugs on highly discounted terms, through both individual corporate schemes and global partnerships. Corporate philanthropists have also emerged as highly effective advocates for the financial replenishment of the Global Fund to Fight HIV/AIDS, Malaria and Tuberculosis (Global Fund) and the Global Alliance on Vaccines and Immunisation (GAVI).

All of this stands in stark contrast to the position with respect to support for education in developing countries. Education represents a small share of corporate philanthropic finance. Philanthropic foundations and companies are not involved in any meaningful way in multilateral aid partnerships. They have a limited voice as global advocates. There are no analogues in education for the global health funds, with consequences for finance and global partnerships. Given the scale of the global crisis in education, and recent evidence of stalled progress towards the international development goals, these are significant omissions.

The limited engagement of corporate philanthropy has not gone unnoticed. Bilateral donors, the World Bank and UN agencies are all actively promoting the development of new partnerships with the private sector and corporate philanthropists. Yet little attention has been directed towards a review of what such partnerships might mean in terms of approaches to policy reform.

Philanthropic engagement in international development is not a politically neutral enterprise. The school reform debate in the United States is instructive. Companies and philanthropists have had a considerable influence on this debate. They have emerged as powerful advocates for a reform path that places a premium on increased competition between education providers, an expanded role for private provision, more stringent approaches to testing, and sanctions against 'failing' schools and teachers. These are themes that figure with increased prominence in debates on education in the world's poorest countries, with several major donors advocating an expanded role for private provision to counteract 'state failure'. In a highly contested public policy arena like education, corporate philanthropists are likely to carry considerable influence with donors, governments and NGOs. To the extent that the United States experience is relevant in this context, it suggests that development agencies should be more aware of the potential pitfalls associated with the market-based quick fixes preferred by some major philanthropic actors.

The current paper is divided into five sections. It starts by providing a brief summary of progress towards the Education for All goals adopted in 2000. Section 2 provides a critical assessment of corporate philanthropic involvement in education. Section 3 examines the current multilateral aid framework for education, focusing on the Fast Track Initiative (FTI). In Section 4 we contrast what has been achieved through the FTI with the track record of the Global Fund, and make the case for a new multilateral aid architecture centred on a global fund for education. Section 5 looks at the role of corporate philanthropy in shaping the school reform debate in the United States and draws some parallels with ongoing debates over education reform in the poorest countries. The paper concludes with some broad recommendations.

Progress and setbacks in education

Any assessment of corporate philanthropy in education has to start by considering where the world stands in relation to the Education for All goals adopted in 2000.¹ On any measure of progress, there have been some remarkable achievements. Some of the world's poorest countries – Bangladesh, Ethiopia, India, Tanzania and Mozambique among them – have dramatically accelerated progress towards universal primary education. Yet the world is facing what Gordon Brown, the former Prime Minister of the United Kingdom, has described as an 'education emergency' (Brown 2011). That emergency encompasses both *access to school* and *learning in school*.

Out-of-school numbers tell part of the story. In the midst of an increasingly knowledge-based global economy, there are still around 67 million primary school age children and 74 million adolescents out of school. The problem is most severe in sub-Saharan Africa, where one in three children of primary school age are not in education (UNESCO 2011). Headline numbers understate the scale of the access problem because many children in school drop out before completing a full primary education cycle – 10 million in sub-Saharan Africa alone.

The scale of global inequality in education is not widely recognised. Today a child entering the education system in a country like the UK has a 45 per cent chance of reaching further education, compared with 6 per cent in sub-Saharan Africa (Brown 2011). By contrast, there are many countries in sub-Saharan Africa, where the median 16–18-year-old has received less than four years of education – and fewer if they are girls (UNESCO 2010). These are outcomes with ramifications that go beyond education. Much of the debate on strategies for the successful integration of low-income countries into the globalised world economy has been couched in terms of macroeconomic policy reform and infrastructure, with an emphasis on fiscal sustainability, open markets, and private sector investment. Without discounting the importance of macroeconomic policy reform, there is compelling evidence that, in today's knowledge-based global economy, it is human capital, not physical capital that holds the key to sustained economic growth and success in world markets (Milanovic 2010, 2011). Without accelerated progress in education, it would appear unlikely that sub-Saharan Africa and other poor regions will be in a position to expand their share of world trade, to enter higher value-added markets, to increase the share of value added in the domestic economy, or to sustain broad-based economic growth.

There is compelling evidence that a weak track record of progress towards the 2015 education goals is getting worse. Recent years have seen a marked slowdown in the rate at which the out-

¹ Adopted at the World Forum on Education for All in Dakar, Senegal in 2000, the Education for All goals are somewhat broader than the Millennium Development Goals. They cover six areas, ranging from early childhood development and universal primary education, to gender equity, adult education, and education quality.

of-school population is declining (UNESCO 2011). If the slower progress of recent years is projected forward to 2015, there could be as many as 72 million children out of school. One of the reasons for the slowdown is a failure of governments to tackle deep-rooted inequalities associated with wealth, gender, ethnicity and other markers for disadvantage (UNESCO 2010). These national disparities often exceed disparities between countries. To take one example, a boy from a wealthy urban family in Nigeria receives on average around nine years in education compared to less than one year for poor, rural females in northern Nigeria (UNESCO 2010). Such inequalities are linked to the financial costs associated with sending children to school (even in countries that have abolished user fees), distance from school (which is particularly damaging for girls' education), the poor state of school infrastructure and parental perceptions of education quality. Gender disadvantages also weigh heavily. In societies where the value of a girl's education is seen as inferior to that of a boy, females will be the last into school and the first to be taken out during periods of economic stress.

The crisis in learning

Getting children into school is just one side of the education for all equation. The other comprises what they get out of school in terms of learning achievement, social interaction, and preparation for employment markets. As a recent report by the Brookings Institution has highlighted, progress in enrolment has not been matched by advances in learning (Brookings Institution 2011). Over recent years there has been a steady stream of evidence highlighting the abysmal state of learning experienced by many children. On one estimate, around 200 million children are learning so little in primary school that they emerge unable to read basic words (Brookings Institution 2011). In rural Pakistan less than one third of children tested at the end of third grade were able correctly to form a sentence with the word 'school' in the vernacular Urdu (Das, Pandey and Zajonc 2006). India may be nearing universal primary enrolment, yet over one third of grade 4 students assessed in one recent exercise were able to meet grade 2 standards. In Kenya, one in every ten children sitting in eighth grade classrooms could not complete a simple maths exercise designed for grade 2 children (Uwezo 2011).

The 'global learning crisis', as it has been termed, cannot be traced to simple cause-and-effect relationships. Some of the greatest obstacles to progress are located beyond the education system in household poverty, child malnutrition, parental illiteracy, and deeply rooted social, cultural and economic disparities. What happens in classrooms cannot override these forces – but it can either mitigate or reinforce them. When it comes to learning achievement levels, no education system is better than its teachers. Yet the poorest countries face a shortage of around 1.6 million teachers (UNESCO 2010). Here, too, headline numbers understate the problem. Teacher training systems are for the most part failing to equip teachers with the initial training and in-service support they need to deliver effective education. Low remuneration, overcrowded classes, and heavy workloads have created a crisis in motivation in many countries (Brown 2011). To add to these concerns, the abysmal state of the school infrastructure and shortages of textbooks and learning materials limit the scope for providing education of decent quality. While wealthier households may be in a position to respond to state failure in education by putting their children in high-performing private schools, that option is not open to the parents living in poverty. For them and their children the options are exit from education, participation in public schools, or entry into the unregulated world of the low-fee private schools that are proliferating across the poorest countries.

Standing back from the distinctive challenges and opportunities facing individual countries, there are some broad global conditions for achieving accelerated progress. The most important of these relate to national policies and institutions. All too often, governments are failing to put in

place the investments and equitable public spending strategies needed to extend education opportunities to their most marginalised children. Institutional failures in areas such as learning assessment, curriculum development and teacher training are also widespread. More broadly, breaking down the structures of inherited disadvantage in education requires public policies that integrate education into broader poverty reduction and social protection strategies, especially in areas such as early childhood nutrition.

International cooperation has a vital role to play in closing education financing gaps and building capacity. Many of the poorest developing countries have significantly increased spending on education over the past decade (UNESCO 2011). Yet as a group they still face a large financing gap. They need around US\$16 billion annually in external support to achieve the Education for All goals, over and above their own resource mobilisation efforts. Current development assistance has stagnated over several years at US\$3–4 billion. This financing gap imposes constraints on capital investment in school infrastructure and recurrent expenditures, principally for teachers (UNESCO 2010). International action is also needed to alleviate other constraints. Emerging information and communication technology (ICT) has opened up new opportunities for online learning, teacher training, assessment, and the sharing of materials. Yet children and teachers in the poorest countries have limited access to the global information highway, with the cost of connectivity reinforcing the global education divide (Brown 2011). This is an area in which public–private partnerships have a role to play.

The global crisis in education has received little attention on the part of the media, campaigning organisations or corporate philanthropists. At one level, this is understandable. You don't see children starving for want of teachers, schools and textbooks. By the same token, the education deficits summarised in this section have grave consequences at many levels. Progress in education – particularly girls' education – is intimately related to advances in child survival, nutrition and other areas of public health. To take one example, it has been estimated that securing some secondary education for all of Africa's girls would prevent an estimated 1.8 million child deaths annually. Achieving universal education and raising learning standards in the poorest countries could raise long-run growth rates by 2 per cent per capita, with attendant gains for poverty reduction, youth employment and innovation (Brookings 2011; Brown 2011). These are outcomes which reflect the potential for education to act as a source of empowerment and human capabilities through which individuals and societies can build better futures.

Such considerations might be expected to weigh heavily in approaches to corporate philanthropy. Major corporations have a common interest in creating the conditions for economic growth and innovation. As investors, their productivity and profitability is intimately connected to the level of skills and capabilities generated through education systems. And as philanthropists, it might be anticipated that corporate actors would seek to promote ambitious strategies for extending education opportunities, both through their own initiatives and by operating through wider partnerships. Yet their engagement to date has been limited.

Philanthropic engagement in education

Since the World Summit on Education for All in Dakar, Senegal in 2000, the private sector in general and corporate philanthropy in particular have figured with increased prominence in debates on global education. The Global Education Initiative (GEI), which is convened under the auspices of the World Economic Forum, claims to have sustained a dialogue with 40 private

sector partners.² Recent donor strategies for the World Bank, the United States and the United Kingdom all attach weight to engagement with the private sector, including corporate philanthropy. Several UN agencies have also made the development of corporate partnerships a central theme in their education strategies. To date, however, this surge of interest has not produced significant results. Whether measured by contributions to finance, participation in global partnerships, political engagement, or advocacy, corporate philanthropy has not made a meaningful contribution to wider international partnerships on education. Nor has it delivered results where they most count – namely, in the lives of the children at the sharp end of the education crisis.

Limited financing

Consider first the issue of financing. Data constraints make it difficult to provide a comprehensive picture of the financial contribution to education in the poorest countries made through corporate philanthropy. This is true even for the United States, which has the most developed reporting systems. Data from other OECD countries are notoriously patchy and in some cases non-existent (Center for Global Prosperity 2011). While Development Assistance Committee (DAC) members report private giving on an annual basis, most of the data are drawn from voluntary surveys. Even with these caveats in mind, it is possible to paint a broad picture of the place of education in the wider philanthropic financing effort.

The overall financing envelope for corporate philanthropy has expanded significantly over the past decade. According to the Hudson Institute, ‘private philanthropy’ in the United States delivered US\$37 billion in finance to developing countries in 2009 – around one third more than official aid. Some US\$4.6 billion of this amount was channelled through foundations and US\$8.9 billion through corporations (Center for Global prosperity 2011). There is no comprehensive source reporting on education. However, detailed analysis carried out by Justin van Fleet at the Brookings Institution has used firm-based surveys to estimate support levels (van Fleet 2011a; van Fleet 2011b). His analysis puts the overall contribution to education from corporations at just 5 per cent of their total philanthropic spending, or some US\$400 million annually. This compared with the US\$7 billion annually – over two thirds of the total – allocated to health. More recent data put corporate donations to health closer to 90 per cent of the total, at around US\$8 billion annually.

Future spending plans would appear unlikely to fundamentally change the profile of support for education in developing countries. An analysis of the billionaires covered under the Bill Gates and Warren Buffet 2010 *Giving Pledge* initiative revealed that around 17 per cent planned to use their wealth to contribute to international development, but just two mentioned education – and neither directly pledges funding for provision in poor countries (Adams, van Fleet and Winthrop 2010). While the Gates Foundation plays a very active and high-profile financial and political role in relation to education in the United States, it does not have a global education programme and education barely figures in its general development programme. Even so, the imbalance between its activities in health on the one side and education on the other is symptomatic of the wider philanthropic failure to engage with the education for all agenda.

The profile of philanthropic finance has a bearing on the activities supported. Around 70 per cent of the contribution comes in the form of cash donations, most of it from companies rather than corporate foundations (van Fleet 2011a). The upshot is that most philanthropic finance is linked to

² The GEI's Steering Board consists of 13 Industry and Strategic Partners: Abraaj Capital, Cisco, Deloitte, Edelman, EMC, HCL, Heidrick & Struggles, Intel, Juniper Networks, Lenovo, ManpowerGroup, McGraw-Hill and Microsoft (www.weforum.org/issues/education).

commercial investment operations. Provision of training within the company itself, or its affiliates, often to promote skills development of the workforce, investment in brand recognition, and support for community-based initiatives in areas close to investment sites dominate most company portfolios for philanthropic finance in education (van Fleet 2011b).

Weak links to international development goals

Looking beyond the headline financing numbers, to what extent is the financing that is provided geared towards achieving the international development goals in education? This is another question that data constraints make it difficult to answer conclusively – but there is little evidence to suggest a strong connection.

Corporate philanthropy would appear to be heavily skewed away from poorer countries and towards higher levels of education. Analysis by the World Bank found that only around 10 per cent of US foundation grants were directed towards international development, and that only 3 per cent of recipients were countries eligible for International Development Association Assistance (DECPG 2006).³ Much of the support that is provided is delivered to middle-income countries and emerging markets, reflecting a tight fit between commercial investments and corporate philanthropy. One review using 2008 data found that just three countries in sub-Saharan Africa – Kenya, Nigeria and Uganda – figured in the list of top twenty recipients (Srivastava and Oh 2010). In the case of foundations, higher education heavily outweighs basic education, with the ‘big six’ US foundations estimated to have disbursed by 2010 some US\$350 million through the Partnership for Higher Education in Africa (Srivastava and Oh 2011). While there is little doubt that higher education in sub-Saharan Africa and other regions needs support, this spending pattern raises questions about equity that few foundations appear to have reflected upon. Given that only a small minority of African children (and an even smaller minority of poor children) has any prospect of reaching higher education, the benefits of corporate philanthropy would appear to be heavily skewed towards higher-income groups.

Looking beyond finance there are questions over the effectiveness of philanthropic aid. Much of the financing provided for the education sector falls foul of the effective aid principles adopted by the OECD (Fengler and Khan, 2010). These principles emphasise the importance of coordinating aid behind national priorities and operating through national budgets and reporting systems, rather than standalone projects, with a premium on predictability. Most of the grants provided by American corporate philanthropists are very small. Only 64 of the 114 companies covered in the Brookings survey reported support to education, with around half making contributions of less than US\$1 million. Only around one quarter reported any coordination with host governments and one fifth report coordination with donors (van Fleet 2011a). Such practices have the potential to undermine national planning and the development of national systems. They can also have the effect of weakening accountability. As van Fleet puts it, ‘When the private sector supports education without a high degree of government oversight, the government is likely relinquishing at least part of its sovereignty over the provision of education as well as its accountability to the public’ (van Fleet 2011).

The weak alignment between corporate philanthropy and national education strategies raises wider concerns. Education policy is an area of vital national interest. Governments invest in education because it is a human right, an engine of social progress, an economic asset and a driver of innovation for their countries. The same factors explain why education figures with some

³ It should be noted that tracking grants by recipient country provides a distorted picture since finance is often channelled through intermediary bodies. Hence Switzerland is the largest recipient of US foundation grants, largely because this is where the global health funds are registered as legal entities.

prominence as an international development goal. While individual corporate philanthropists may recognise the wider rationale for supporting education, the motivations for providing support often reflect other priorities. The survey by van Fleet of US firms involved in education identified support for the international aid effort as the fourth priority, following improved community relations, social responsibility, and brand identification. Other studies have found that companies tend to step up investments in education and other social activities when they have suffered 'brand damage'. More generally, company investments in education and training typically reflect their own company needs and skills deficits, rather than national priorities for education policy in the host country (van Fleet 2011).

Looking beyond what companies do themselves to the wider international dialogue between companies and other partners, it is difficult to find evidence of meaningful action. The World Economic Forum (WEF) has emerged over the past decade as one of the primary sites for corporate engagement in international development. Here too, though, substantive delivery has been limited. What is often described as 'dialogue' in the WEF has largely been an exercise in showcasing individual corporate projects, few of which appear to have been subjected to even the most rudimentary independent evaluation. Initiated in 2003, WEF's Global Education Initiative (GEI) is described as a 'multi-stakeholder approach to education advancement'. Yet after eight years there is not a single independent evaluation of the outcomes, or any evidence of impact in terms of pushing education up the international development agenda. The GEI was terminated in 2011 (WEF 2011). In marked contrast to the health sector (see following section), corporate philanthropists in education are not engaged in coordinated global initiatives linked to the international development goals. There is no body in education comparable to the Global Business Council for Health, which coordinates advocacy and networking.

At first sight, the limited involvement of corporate philanthropy in global education initiatives is something of a paradox. It is sometimes argued that the commercial interests of pharmaceutical companies have been a major driver for their engagement with global health funds. That may be the case. Yet education also represents a large market for goods and services, ranging from school construction to teacher training and textbook supply. The sector typically accounts for 4–6 per cent of GDP in the poorest countries and over 15 per cent of government spending, with significant financing contributions from households. Moreover, there are major global companies in ICT, textbook supply and other areas with a potentially large stake in accelerated progress in education. It is difficult to avoid being struck by the contrast between the scale of support provided by pharmaceutical companies for a range of global health initiatives in areas ranging from trachoma to river blindness and treatment of parasitic diseases, and the limited support provided by corporate philanthropists in tackling impediments to education of decent quality. The fact that the corporate sector stands to gain from the benefits associated with the development of a more skilled workforce, new opportunities for investment, innovation and more rapid growth that could come with that progress adds to the paradox.

So why the restricted engagement? Part of the answer to that question has to be sought in the wider international aid architecture. Corporate philanthropy does not operate in isolation. The priorities and practices adopted reflect both internal decision-making processes and the wider set of options facing decision-makers. Particularly important in the latter context are the institutional mechanisms and arrangements through which corporate philanthropy can operate. In the health sector, the global funds have opened up new windows not just for philanthropic financing, but for corporate participation in dialogue, advocacy and project-level delivery. By contrast, the education sector lacks a strong multilateral core. It suffers from weak and fragmented leadership on the part of UN agencies and the World Bank. Another difference with the health sector has been the absence of credible global funds. Lacking the option of recourse to multilateral

mechanisms, philanthropists have been pushed back towards the project-based approaches described earlier.

Islands of good practice

While the global corporate philanthropic effort suffers from some deeply ingrained shortcomings, there are examples of good practice. In some cases, corporate philanthropists have combined a strong commitment to education with a strategic agenda aimed at leveraging wider benefits through improvements to the public education system.

Some major foundations have invested heavily in education. The Aga Khan Foundation, which allocated around US\$650 million to development activities in 2010, has made education a central priority. Operating more than 240 schools and education programmes across eight developing countries its programmes place a premium on high-quality learning and gender equity. Unlike many philanthropic interventions, the Aga Khan Education Service also established high standards for independent evaluation (AKES 2011). Similarly, the limited interest of US billionaire philanthropists contrasts markedly with the example of India's Azim Premji, the Chairman of WIPRO, who has committed a significant proportion of his personal wealth to improving education in India.

Not all effective philanthropic interventions have involved large-scale financing. The Hewlett Foundation has provided US\$45 million to 47 countries through 106 education grants since 2003. As basic arithmetic suggests, most of the grants have been very small. But some have played a major role in leveraging change and shifting national and global debates on education. Grants from the Hewlett Foundation were instrumental in supporting the development and expansion of an Indian NGO called Pratham, which conducts and publishes an annual survey of learning achievement in the country's schools. The Annual State of Education (ASER) now operates on a national basis (Pratham 2011; Pratham 2010). Reporting of the results has done much to highlight the poor quality of education experienced by children in India's public schools, helping to put learning and teaching standards at the centre of a wider public debate. The assessment model developed by Pratham has now been adopted by organisations in Kenya, Tanzania and Uganda, again with support from the Hewlett Foundation (Hewlett 2011; Uwezo 2011).

Emerging models of corporate philanthropy in India have challenged some of the more traditional approaches to engagement with education. One illustration comes from the Sir Ratan Tata Trust (SRTT) and the Navajbai Ratan Tata Trust (NRTT). Through much of their history the foundations have operated largely outside the sphere of the public education system, supporting a range of charitable schools and education causes. The period since 2000 has seen a marked shift both in the scale of support to education and the pattern of delivery. Grants to education have expanded by a factor of five, to around US\$3.5 million, with a strong emphasis on primary education. Grants under this programme specifically target four underserved regions and disadvantaged communities, with an emphasis on working through the public education system to strengthen teacher training, provide in-service support for literacy and numeracy teaching, and develop teaching materials and the school curriculum. The Learning Enhancement initiative piloted in two districts of Karnataka state, which focuses on improving literacy and numeracy, has achieved some striking results. Similarly, an evaluation of a programme covering 220 government elementary schools in Madhya Pradesh documented marked improvements in attendance, exam performance and dropout rates (Ratan Tata Trust 2011).⁴

⁴ An impact assessment of the grant found that test scores for maths and language were 206 per cent and 32 per cent higher than for a control group of schools (Sir Ratan Tata Trust 2011).

Another example comes from the ICICI Foundation for Inclusive Growth. Focusing on the promotion of universal quality education for 6–14-year-old children, the foundation has concentrated its programme on areas such as teacher training and support, textbook development, and support for child-friendly education systems. It has developed memoranda of understanding with the state governments of Rajasthan and Chhattisgarh to provide support over a six-year period. This will include the development of a new Diploma for Education geared towards improved literacy and numeracy training. The scale of the programme is substantial. In the case of Rajasthan more than 250,000 teachers will be trained directly, with the new diploma for education being adopted by 32 of the state's District Institutes for Education and Training (ICICI Foundation 2011).⁵

Three features of these Indian foundation initiatives serve as broader indicators of good practice. First, because they work through, rather than around, the public education system they achieve a far wider dispersion of benefits, with the potential for leveraging and supporting reform across the education system. Second, and related, they are geared towards the development of capacity in the public education system through constructive engagement with state governments and teachers' organisations. Third, they have a strong focus on states, districts and social groups that have fallen behind, but which have to be reached if India is to achieve the bold policy commitments made under its 2009 Right of Children to free and Compulsory Education Act.

The Fast Track Initiative⁶

Opportunities for corporate philanthropy are shaped not just by internal decision-making processes, but also by the external environment. Multilateral aid partnerships provide a potential vehicle through which companies and philanthropic foundations can contribute to wider development efforts. In the case of education, the weaknesses of multilateral cooperation create incentives for companies to operate through their own schemes in pursuit of their own priorities.

The weakness of the multilateral core in education is evident in the evolution of the Fast Track Initiative (FTI), which was rebranded in 2011 as the Global Partnership for Education. Created in 2002, the same year as the Global Fund, the FTI was framed as a mechanism to accelerate progress towards the MDGs in education. It brought together in the governance structure the major UN agencies involved in education, representatives of developing country governments and civil society organisations. Financed through a trust fund administered by the World Bank, the new arrangement was presented as a 'global compact' between rich and poor countries. Under the terms of that compact, developing country governments would increase financing and strengthen planning to achieve the 2015 goals. Developed countries pledged to back their efforts and ensure that 'no country committed to the goals would be allowed to fail through want of finance'.

Superficial similarities in governance structure are where the meaningful comparisons between the FTI and the global health funds start and end. Unlike the global health funds, the FTI is not an independent body bringing together a broad alliance of equal partners. The World Bank has enjoyed a 'first among equals' status. It provides the FTI's secretariat, acts as trustee of the fund which provides grants, and in all but a handful of cases has been the supervising entity

⁵ The overall goal is to train 500 master trainers, 80–100 nodal head masters, 20,000 student teachers, 250 key resource persons and 210,000 in-service teachers, which will impact about 8 million students across the state (ICICI Foundation for Inclusive Growth 2011).

⁶ This section draws on recent reviews of the Fast Track Initiative including Mokoro (2010), UNESCO (2010) and Brown (2011).

overseeing project implementation. For practical purposes, the FTI is increasingly seen as a World Bank facility. At a country level, requests for funding from developing country governments are channelled through local aid donors, rather than an independent review process. Similarly, disbursement takes place through governments in a position to comply with stringent World Bank reporting requirements.

These arrangements restrict the scope for engagement with the private sector. In contrast to the global health funds (see next section), companies have little scope either for initiating proposals or for participating in project implementation. Corporate philanthropists have provided no financial support through the FTI because there is no private sector financing window. Nor have they provided support in kind in the form of goods and services provided at discounted prices in areas such as classroom construction, textbook provision, ICT and e-learning opportunities, and teacher training.

There has been a protracted debate over the record of the FTI. Recent evaluations have been very critical, highlighting in particular the low level of financial support, the slow pace of grant disbursement and limited country coverage (GMR 2010; Mokoro 2010). The governance structure has also been called into question. Other areas of concern include the undue weight attached to the influence of donors and the multiple roles played by the World Bank in providing the secretariat, supervising grants, and overseeing fiduciary management. Recent reforms have partially addressed some of the governance problems that have dogged the FTI. But the facility remains a very limited vehicle for multilateral cooperation with a poor track record.

- *Financing.* The FTI has disbursed US\$981 million since the creation of a funding mechanism (the Catalytic Fund) in 2004. This compares with the US\$13 billion disbursed by the Global Fund to Fight AIDS, Tuberculosis and Malaria (henceforth Global Fund). The 2010 FTI disbursement figure reached US\$249 million (against US\$3 billion for the Global Fund). Apart from the very low levels of financing, there have been protracted delays in grant disbursement, with some countries waiting for up to six years for grants (Birmingham 2011).
- *Replenishment.* Recent financial resource mobilisation exercises underline the unequal standing of the FTI and the global health funds. In November 2011, the FTI is seeking to secure a replenishment of around US\$1.5 billion for a period of three to four years. This compares with the US\$13 billion in commitments for Global Fund replenishment and the US\$4.7 billion secured by GAVI in 2011.
- *A limited donor base, reflecting restricted donor engagement.* From the outset, FTI financing has been reliant on a small group of donors. Just two – the United Kingdom and the Netherlands – have provided over one third of pledges to date. Several G8 donors to education are either absent (the United States) or minor contributors (France and Germany).
- *Restricted flexibility excludes potential partners, and countries.* In all but four cases the World Bank has been the supervising entity for FTI grants and in all cases governments have been the grant recipients. This rigid structure has limited the scope for the transfer of grants to NGOs, philanthropic groups and other agencies working in concert with government. It has also served to exclude countries, notably conflict-affected countries, unable to meet the World Bank's grant disbursement requirements.
- *Limited visibility.* One of the reasons that the global health funds have attracted support from corporate philanthropists is that they are highly visible, with attendant benefits for reputation and brand recognition. The global funds figure prominently on agendas of the Group of Eight

(G8) and their financial replenishments have become high-profile events. Another factor is the availability of evidence pointing to impact in terms of lives saved through the provision of anti-retroviral drugs, insecticide-treated bed-nets and immunisation. Such evidence makes it possible for companies and philanthropic foundations to claim that their investments are making a real difference. The FTI lacks these advantages. It no longer figures on the agendas of either the G8 or the G20, while limited financing and slow disbursement has made it difficult to establish credible claims of high-impact results.

Reforming the aid architecture: The case for a global fund for education

Many of the weaknesses associated with current corporate philanthropic practices can be traced back to failures in the international aid architecture. The absence of a credible mechanism through which to pool resources within a multilateral framework geared towards shared international development goals is a source of inefficiency. It forces companies and foundations to operate through their own structures, multiplying the overall costs of fiduciary management, project assessment and aid delivery. It also reinforces the tendency for philanthropic charity to follow corporate investment, often with scant regard for the development needs of the host country. While the various actors in corporate philanthropy may use the language of 'results-based' delivery and emphasise the importance of cost-effectiveness, their current practices combine low impact with high cost.

Changing this picture will require fundamental reform of multilateralism in aid for education. In 2011 the FTI was rebranded as the Global Partnership for Education – but rebranding is not a substitute for more far-reaching change. There are elements of the FTI which should be retained, including the focus on support for nationally owned strategies and 'horizontal' aid to strengthen education systems. Other elements need fundamental rethinking. This includes the role of the World Bank as a first among equals in the governance system. Using the Bank as the primary supervising entity for grants has the effect of slowing disbursement, restricting the range of countries able to secure support, and limiting the scope for the development of the innovative country-level partnerships that have been a feature of the Global Fund for HIV/AIDS, Malaria and Tuberculosis. Over recent years, the World Bank itself has been a weak advocate for education, which has contributed to the limited visibility of the FTI. It is against this backdrop that several commentators have called for the reconstitution of the FTI as an independent Global Fund for Education, modelled on the global health funds (Brown 2011a, 2011b; UNESCO 2010)

Such an arrangement would open up new opportunities for corporate philanthropy. The Global Fund for Education could include a window for non-government finance, making it possible for philanthropists to contribute to a wider financing pool – and to reach countries outside of those covered by their investment activities. Apart from lowering the cost of aid delivery and strengthening impact, it would also weaken the link between philanthropic support and corporate investment. Corporate philanthropists would be in a position to support a far wider group of countries. Over and above the financing contribution, an effective multilateral fund could facilitate corporate philanthropic participation in a range of partnerships. Just as the global health funds have facilitated the delivery of medicines, training and support for capacity building, so a global fund for education could facilitate public–private partnerships aimed at driving down the costs of ICT access, expanding e-learning opportunities, and strengthening teacher training.

Looking beyond finance, a credible global fund for education could provide a focal point for corporate advocacy. The formation of a Global Business Council for Education in October 2011 marked the first step towards the development of a more coordinated approach to networking. Modelled on the Global Business Council for Health, the new body brings together a number of

major corporate actors and foundations. However, whereas the corporate advocacy effort in health has been geared towards the promotion of the global funds, in education it currently lacks a locus. The vacuum in the multilateral system in turn runs the risk of corporate philanthropists developing a parallel advocacy agenda reflecting some of the approaches promoted in the US school reform debate.

While the precise shape of a global fund for education would be a matter for negotiation, the problems in the FTI would have to be addressed. Current levels of financing are far too limited to deliver meaningful results. The 2011 financial replenishment appears unlikely to change this picture. At a minimum, the global fund would require initial capitalisation to 2015 of US\$3–4 billion annually. If that financing is secured, the fund could invite tenders for projects that accelerate progress towards the 2015 goals in priority areas such as access to basic education, learning outcomes, equity and provision in conflict-affected states. The aim would be to incentivise reform. Proposals from governments, NGOs and the business community would be subjected to independent review (as they are in the Global Fund), with a premium placed on bold targets, rapid disbursement and stringent evaluation.

The global health funds as a vehicle for corporate philanthropy

Developments in global public health demonstrate the two-way interaction between corporate philanthropy and multilateral aid institutions. The level of finance provided by philanthropic foundations and companies has influenced not just the scale of support for health initiatives, but also the weight attached to specific diseases and approaches to aid delivery. By the same token, the presence of strong multilateral funding institutions has acted as a magnet for corporate support, facilitating entry into areas that would not have been possible through company-based schemes. Unlike the education sector, multilateralism in health has provided a vehicle through which corporate philanthropy can be harnessed to a wider global partnership.

Ten years ago an editorial in *The Lancet* commented that ‘money from the Gates Foundation has revitalised a number of major global health initiatives’ (*The Lancet* 2001). ‘Resuscitated’ might have been a more accurate depiction. The Global Alliance for Vaccines and Immunisation (GAVI), created in 2000, was initially capitalised by a Gates Foundation grant. Since then, there has been an exponential increase in financing through private foundations and companies. The entry of the Bill and Melinda Gates Foundation was a transformative moment. In 2006, the foundation awarded 195 global health grants totalling US\$2.2 billion, making it the world’s third largest donor in health, after the United States and the United Kingdom (McKoy *et al.* 2009). Other prominent foundations operating in the health sector include Rockefeller, the Wellcome Trust, the Ford Foundation, the UN Foundation and the Aga Khan Foundation.

Corporate philanthropic financing for global health operates on a different scale than in education. According to the Hudson Institute, around 90 per cent of the corporate contribution to international development in 2009 – around US\$8.1 billion – came from pharmaceutical companies (Hudson Institute 2011). Reportedly, half of this amount was directed to sub-Saharan Africa.⁷ As a brief visit to the home page of any major pharmaceutical firm will attest, most companies are engaged in a vast array of health initiatives. These range from company schemes that provide cash grants, to in-kind donations and ‘cut-price’ medicines, to disease-specific

⁷ Another review of the contribution of pharmaceutical companies arrives at a lower figure of just under US\$2 billion for 2009 but this focuses on narrower interventions for the health-related MDGs (Kanavos *et al.* 2008).

initiatives, and involvement in regional and global health partnerships (McCoy, Chand and Sridhar 2009). To take one example, Pfizer reports that it has donated 225 million treatments under the International Trachoma Initiative it supports – a major medical training and research centre at Uganda’s Makerere University which has trained 6,500 health workers from 27 African countries (Pfizer 2011).

Direct financing and in-kind contributions

Global health funds have become focal points for corporate philanthropy. They have harnessed philanthropic finance, contributions in kind, aid delivery and advocacy to multilateral mechanisms that are geared towards multilateral development goals. In doing so they have enabled corporate philanthropic actors to pool their resources and generate efficiency gains.

Direct financing is one channel for support. Consider first the Global Fund. The Bill and Melinda Gates Foundation is one of the largest donors, having pledged US\$1.1 billion to date – around the same level as Canada or Italy (Global Fund 2011b). New entrants from the world of corporate philanthropy continue to arrive. In 2008, Chevron made a commitment of US\$55 million over five years. In March 2010, Japan’s largest pharmaceutical company, Takeda Pharmaceutical, made a ten-year commitment. It should be added that the Global Fund has acted as a conduit for a far wider range of broadly defined philanthropic contributions falling outside of the scope of this paper. Business and private foundations now account for around 7 per cent of all Global Fund commitments with projections pointing to an increased share (Global Fund 2010).

Both the Global Fund and GAVI mobilise a range of in-kind contributions from companies. In the case of the Global Fund, drug manufacturers and companies producing testing kits, insecticide-treated nets and other inputs are encouraged to adopt not-for-profit pricing, allow low-cost manufacturing of products covered by their intellectual property rights, and undertake research aimed at finding new ways to combat the three diseases covered by the global funds. Under the recently adopted Affordable Medicines Facility for malaria, which is supported by UNITAID, companies such as Novartis and Sanofi-Aventis have agreed to provide new anti-malarial treatment on a cost basis. Services are also provided on concessional terms. One recent example is a commitment by Standard Bank to provide financial and management expertise to recipients of Global Fund grants in selected African countries (Global Fund 2010). Similarly, GAVI purchases vaccines at a large discount against market prices. It should be mentioned that this is an area of considerable controversy. NGOs such as Médecins Sans Frontières and Oxfam have voiced concerns over the prices paid to pharmaceutical companies by both the Global Fund and GAVI (Berman 2011). These concerns underline the importance of transparency in the pricing of goods and services purchased by the global funds.

Looking beyond the immediate pricing issues, the role of the global health funds in mobilising in-kind contributions stands in marked contrast to the position in education. As in the health sector, there is no shortage of major companies and philanthropic foundations equipped to provide essential goods and services. These range from the obvious classroom-level inputs such as books and teaching materials, to teacher training and support, learning assessment development, and access to information and communication technologies and the worldwide web. These are all areas in which a combination of aid and cost-price provision could help to deliver results on the ground. Yet the absence of a multilateral delivery vehicle has for practical purposes limited the scope for partnerships in these and other areas.

Corporate engagement in aid delivery

It is not just through financing that companies are active in Global Fund implementation. They also figure with some prominence in aid delivery.

As the share of non-government recipients of Global Fund grants has risen, to around 40 per cent of the total, private sector actors have become more involved in delivery (Global Fund 2011b; Global Fund 2010). One recent example comes from Ghana. In 2009, AngloGold Ashanti became the first private sector grant recipient in Africa, receiving US\$30 million to implement an anti-malaria project.⁸ Based on its assessment of the programme's outcomes, the Government of Ghana included the company in a proposal to the Global Fund aimed at financing a public-private partnership programme to combat malaria in 40 districts throughout Ghana. In one recent round of funding the National Electricity and Water Company of Benin was included as a recipient, along with a number of NGOs.

In other cases, private companies have piloted projects that have subsequently been scaled up through Global Fund grants – often with high financial leverage ratios. To take one striking illustration, BHP Hilton, the world's largest mining company, invested US\$0.5 million in developing the first phase of an anti-malarial programme spanning malaria-endemic regions of three countries – eastern Swaziland, southern Mozambique and Kwa-Zulu Natal in South Africa – which led to Global Fund grants of US\$47 million. In some countries, Global Fund grants have supported the private sector in expanding work-based programmes through co-investment models aimed at integrating company-level interventions with national strategies. An example comes from Tanzania, where Unilever Tea operates an in-house hospital that provides free testing and anti-retrovirals, financed by the Global Fund, as part of the national care and treatment plan. In India, a broad array of major corporations – such as Reliance, Bajaj and Godrej – are now part of the network of service delivery agencies supported through the Global Fund and operating through government initiatives.

Each of these initiatives has been made possible by flexible governance arrangements. Briefly summarised, these allow the Global Fund to channel funds through an actor (the Principal Recipient) working with a range of sub-recipients and subject to independent review. By contrast, the FTI framework continues to operate overwhelmingly through the World Bank and the local donor group. This is an arrangement that limits the scope for channelling support through NGOs, private sector actors and others who may be well placed to deliver results.

Foundations and the business community are represented at all levels of Global Fund governance. The Fund's global board includes the Gates Foundation and a representative of the private sector (currently Anglo-American), who is supported by a larger delegation of private sector companies. The delegation is organised and supported by the Global Business Coalition on HIV/AIDS, Tuberculosis and Malaria. At the country level, around 70 per cent of Country Coordinating Mechanisms (CCMs) have private sector representatives (Global Fund 2010). While the private sector is sometimes represented in the country processes through which applications to the FTI are channelled, involvement has been limited and haphazard.

Perhaps the most striking feature of business and foundation engagement has been in global and national advocacy. Hard to measure or quantify as it may be, the impact of that advocacy is reflected in the profile of HIV/AIDS in particular, and to a lesser degree malaria and tuberculosis, on the global development agenda. The Gates Foundation and the chief executive officers of major corporations play a critical role in advance of replenishment meetings, and the Global

⁸ The Anglo Gold Ashanti programme is mirrored in the Philippines, where the Pilipinas Shell Foundation implements a Global Fund grant in the country's five most malaria-endemic provinces.

Fund's 'Corporate Champion' partnerships provide major firms with an opportunity to collaborate on advocacy, outreach and communications both globally and locally.

Philanthropic advocacy

The rise of private foundation and business financing for philanthropy has gone hand in hand with the emergence of a central role in advocacy.

Financial replenishment exercises for the global funds have often been a focal point. The 2011 replenishment of GAVI provides a particularly telling illustration. Estimates by the GAVI secretariat put the financing requirement for the period to 2014 at around US\$3.5 billion. In the event, a high-level advocacy campaign led by Save the Children and supported by Bill Gates and a number of major corporations led to a replenishment of US\$4.7 billion – a remarkable achievement in a period of shrinking aid budgets. By contrast, the FTI replenishment exercise for 2011 has received no support from corporate philanthropists and has struggled to secure a modest US\$1.7 billion in commitments.

Far more than in any other area of international development, corporate philanthropists in health have coordinated their advocacy efforts behind wider partnerships. The Global Business Coalition for Health (GBCH) is a case in point. Founded in 2001, with an initial focus on support for the Global Fund, the GBCH has evolved as a powerful hub for coordination, information-sharing and advocacy across some 200 member companies. With an annual budget of around US\$9 million, it provides advice to companies seeking to make high-impact philanthropic investments about potential partners, approaches and assessments tools. It pools resources to facilitate the training of health workers, conducts research and invests in advocacy. As the 2009 annual report puts it:

On issues of public health, the business voice is a powerful complement to the advocacy work of NGOs and cause-related organisations. Business has influence and reach, and gets heard.

(Global Business Council 2009)

Financial and political engagement with global health funds has a further rationale. The major pharmaceutical companies have the economies of scale, the technologies and the expertise to operate large 'in-house' philanthropic programmes. Health is, after all, their core business, even if health markets exclude millions of poor people in poor countries. Companies in other sectors face different constraints. With limited expertise, health sector interventions may come with high start-up costs, problems in identifying partners, challenges in coordination with government actors and NGOs, and difficulties in establishing the monitoring and evaluation systems needed to assess results. Against this backdrop, pooled funding arrangements are attractive because they lower transaction costs. As one report puts it:

For private philanthropists, the Global Fund offers the chance to invest strategically in the fights against diseases while benefiting from state-of-the-art monitoring, evaluation, reporting and risk management. As a bridge over the poverty gap, the Global Fund is an efficient vehicle to connect to millions for whom health services have been out of reach.

(Global Fund 2010)

The absence of such a multilateral vehicle in education has the perverse effect of incentivising unilateral company initiatives. These come with high start-up costs, weak reporting and evaluation systems, and, as we saw in the previous section, limited integration into national strategies.

‘Philanthrocapitalism’ and education

Corporate philanthropy is not just about the delivery of finance, goods and services. It is also associated with some distinctive approaches to international development. Ever since C.K. Prahalad had popularised the concept of the ‘bottom of the pyramid’ in 2006, management gurus and philanthropists have presented the market as a source of choice and empowerment – and the poor as consumers suffering from assorted market failures. The rise of corporate philanthropy in the health sector has gone hand in hand with the development of public–private partnerships for the development and delivery of drugs. Proponents of these partnerships maintain that they offer a more ‘results-based’ model for change than traditional aid approaches, combining cost-effectiveness with responsiveness to the demands of poor people. Critics argue that corporate philanthropy has an inbuilt bias towards technological quick fixes and the imposition of simple market-based solutions to complex development problems, reducing in the process intended beneficiaries to the status of customers, clients and customers. As one commentator puts it,

My worry is that the hype surrounding philanthrocapitalism will divert attention from the deeper changes that are required to transform society, reduce decisions to an inappropriate bottom line, and lead us to ignore the costs and trade-offs involved in extending business principles into the world of civil society and social change.

(Edwards 2008)

An analysis of the model of change embedded in corporate philanthropy is beyond the scope of this paper. The debate on this issue has occasionally suffered from excessive polarisation. Corporate philanthropy, like philanthropy in general, encompasses many different approaches to social change. Similarly, while the corporate sector has placed more emphasis on technology and cost-effectiveness, it might equally be argued that traditional donors and NGOs have attached too little weight to both. In the context of the current paper, a more pressing concern is the limited consideration that has been given to what an expanded role for corporate philanthropy might mean for approaches to education in the poorest countries.

Some lessons from the health sector

Experience in the health sector provides some cautionary tales alongside the positive outcomes. Corporate philanthropy has unequivocally made a substantial contribution to health financing and the delivery of vital medicines. It has also helped to keep the fight against infectious diseases on the agenda of Northern governments. Set against these achievements, corporate philanthropy has been implicated in some of the more contested areas of aid delivery.

The delivery mode associated with the global funds is one such area. Both the Global Fund and GAVI operate through ‘vertical’ approaches to aid, prioritising the delivery of specific drugs and treatments over the strengthening of health systems. While this model has changed over time, the disease-specific orientation remains intact. Critics maintain that the effect has been to downplay the development of the wider health infrastructure and staff recruitment and training systems needed to deliver results (Fengler and Kharas 2010).

There are also concerns that the skewing of aid towards a narrow range of diseases has distorted and overridden national priorities. One detailed evaluation of grants allocated by the Gates Foundation between 1998 and 2007 found a weak correlation between the burden of disease as experienced by people living in poverty, and grant allocations (*The Lancet* 2010). The correlation was particularly weak with respect to childhood disease and maternal health (Black *et al.* 2010;

Sridhar and Batjani 2009). Global Fund commitments are often misaligned with national health strategies. To take one example, Rwandan authorities have been critical of the narrow focus of grants on inputs for the three diseases, rather than the strengthening of systems (IEG 2011). In 2010, some US\$47 million was provided to the country for HIV/AIDS treatment and prevention – around three quarters of the total international assistance for health. Efforts by the government to attach more weight to malaria and integrated management of child illness were not registered by donors.

Debates in the health sector also reflect wider concerns over the role of ‘philanthrocapitalism’ in narrowing the reform lens. Patents are at the centre of these debates. By offering substantial price discounts on patented drugs, pharmaceutical companies have lowered the cost barriers facing poor countries and poor households. They have also made it possible for the global health funds to deliver more medicines than would otherwise be the case. However, many critics argue that corporate philanthropy on drugs pricing has deflected attention from the more urgent matter of reforming a global patents regime that puts corporate profit before public health, leaving vulnerable countries dependent on unilateral acts of charity on the part of pharmaceutical companies (Stuckler, Basu and McKee 2011).

As governments, donors and international agencies look towards an expanded role for corporate philanthropy in education there are some important lessons to be drawn. ‘Vertical’ approaches to development assistance in education have a long and undistinguished track record. Over the past 20 years, successive waves of reform have emphasised the importance of classroom construction, textbook provision, the removal of school fees, and assorted approaches to teaching. The failure of single-input interventions in these areas has given rise to a broad consensus that progress in education requires the development of an integrated learning system. The wrong type of corporate engagement runs the risk of elevating niche projects – a computer or learning tablet for every child, more and better books, and more teachers – over the systemic challenges of improving teacher quality, strengthening assessment systems and building more equitable and more accountable institutions.

Another lesson from the Global Fund revolves around the governance of corporate philanthropy. Using development assistance and education budgets to purchase goods and services at discounted prices could help some of the world’s poorest countries to secure access to education resources that are currently beyond their financial means. By the same token, education budgets represent a very large and potentially lucrative market for national multinational companies. There is an obvious potential for conflicts of interest, pointing to the need for transparency in pricing and a multilateral governance system that limits the scope for pursuit of vested interest.

The politics of corporate philanthropy: Lessons from school reform in the United States

To what extent is there a distinctively philanthrocapitalist approach to education in the poorest countries? That question is difficult to answer, partly because of the limited level of engagement to date. However, experience in the developed world is of some relevance. Corporate philanthropists have over the past decade been increasingly involved in education reform debates, notably in the United States. They have emerged acting as powerful and highly effective advocates for greater school choice, an expanded role for private providers, more stringent

testing, and punitive sanctions against 'failing' schools and teachers. Parallels with experience in the developing world should be drawn with some caution. By the same token, many of the themes that dominate school reform debates in the rich world figure prominently in debates taking place within poor countries and among the donor community.

Nowhere is the influence of corporate philanthropy more evident than in the rise of the school reform movement in the United States. The Academy Award-winning documentary, *Waiting for 'Superman'*, by the film producer David Guggenheim, reflects that influence. Briefly summarised, the film tells the story of five children who enter a lottery to win a coveted place in a charter school. The heroes of the film include the CEOs of a number of charter schools and Bill Gates, reflecting the role of the Gates Foundation in supporting such schools. The clear message is that American public education is a failing enterprise, that money is not the problem, that test scores are low because teachers are underperforming, and that students drop out because their schools are failing them.

In a deeply divided political system, school reform has emerged as an area with strong elements of bipartisanship (Ravitch 2010). Testing and school choice are two of the central pillars of reform. The Bush Administration's 2001 No Child Left Behind (NCLB) programme mandated standardised testing for grades 3 through 8, with schools unable to meet targets aimed at ensuring all students reached basic proficiency by 2014 subject to sanctions, up to and including closure and transfer to private management. The Obama Administration has diluted the sanctions in some areas. But many of the key features of NCLB remain intact. These include remedies such as more privately managed charter schools, evaluation of teacher performance on the basis of student test scores, and the firing of staff in schools with persistently low scores.

Corporate philanthropists have played a prominent and highly public role in recasting the school reform debate. The cast of characters include billionaire equity investors and hedge-fund managers such as Whitney Tilson, Ravenel Boykin Curry IV and Joel Greenblatt and a range of foundations, including the Bill and Melinda Gates Foundation, the Eli and Edythe Broad Foundation and the Walton Family Foundation (Brill 2011; Ravitch 2011a, 2011b). Corporate finance has played a direct role in supporting high-profile charter schools. More significant, though, has been the role of corporate advocacy in leveraging political change. Diane Ravitch has carefully documented the activities of Wall Street financiers in changing education policies in the Democratic Party through an organisation called Democrats for Education Reform (Ravitch 2011a). Weakening teacher unions has been a central policy goal.

The terms of the school reform debate reflect the influence of market-based models for achieving political change (Ravitch 2009). In the favoured narrative of reformers, the United States education system is in crisis because it bears all the hallmarks of a poorly performing, unaccountable, public sector monopoly. Reform is about creating a market (competing schools) that extends choice to consumers (children and parents) served by employees (teachers) who are held accountable through testing and, where appropriate, rewarded by monetary incentives.

One of the striking features of the approach to school reform promoted by corporate philanthropists is its narrow focus on the country's classrooms, with teachers bearing primary responsibility. Without discounting the critical role of good teaching, there is a vast body of research suggesting that the influence of schools and teachers on test scores is dwarfed by other factors, such as family income, poverty, household characteristics – especially parental education – health, nutrition and disadvantages linked to race, ethnicity and language. Learning achievement gaps start opening up long before children enter school. Yet the tight fit between test scores on the one side and socioeconomic factors on the other has been downplayed by corporate philanthropists. The effect has been to decouple the debate over school reform from a

wider consideration of the dynamic interaction between educational underachievement and poverty. Extreme inequalities in school financing in the United States, linked to the use of local property taxes to finance education, have also been largely overlooked.

Another concern relates to some of the school reform solutions. Corporate philanthropists have been at some pains to emphasise their adherence to 'evidence-based' approaches to policy reform. Yet many of the reforms advocated appear to fly in the face of international and national evidence. In 2011 the OECD carried out a systematic review of evidence from its learning achievement survey to identify lessons for the United States. Almost all of the lessons conflict with the core tenets of the school reform movement. The OECD survey concluded that school choice and private schools do not significantly enhance performance, once the socioeconomic background of students is controlled for. One of the most successful reformers of the past decade in the developed world has been the state of Ontario in Canada, which has dramatically raised learning achievement levels and reduced disparities. In a telling comment, the OECD report notes, 'The Ontario strategy differs from a number of other reform efforts, particularly in the United States, in its lack of punitive accountability, performance pay, and competition among schools'. More generally, the report highlighted the critical importance of education systems recruiting, training and supporting effective teachers (OECD 2011; Vegas 2011)

Evidence from within the United States itself does little to support the reform path adopted by corporate philanthropists. Test scores from high-performing charter schools are frequently cited as evidence that public schools are underperforming. The national survey conducted by Stanford University's Center for Research on Education Outcomes (CREDO) tells a different story. Controlling for variables on student characteristics, CREDO found that 17 per cent of charter schools provided superior education performance, while nearly half had results that are no different from local public school options. Perhaps the most telling statistic, though, was that over one third of charter schools – 37 per cent – delivered learning results that are significantly worse than would have been predicted for the same students in public schools (CREDO 2009). Black and Hispanic pupils registered lower gains in reading and maths than their public school peers. One of the worst performing states for charter schools was Texas, which has been widely cited by advocates for school reform as a success story. Other studies have called into question the achievements of programmes widely cited by philanthropists (and heavily funded by Wall Street financiers) as models for reform, including the Knowledge is Power Programme (KIPP) and the Harlem Children's Zone. While KIPP schools register higher student scores they also have high dropout rates (which inflates average scores), and the results achieved by the Harlem Children's Zone schools reflect small class sizes and higher levels of per student financing (Benn 2011; Ravitch 2011a; Ravitch 2011c).

The point here is not to pass judgement on the relative performance of different types of schools in the American education system. There are outstanding and failing charter schools, just as there are outstanding and failing public schools. The point that is relevant for this paper is the role of corporate philanthropy in shaping public debate and informing public policy choices.

Parallels with the developing world

In many developing countries, the poor are giving up waiting for the state to provide decent schooling and are choosing to pay for low-cost privately run schools... DFID will explore how to make the extensive non-state provision of basic services work better for poor people; and look to scale up where non-state provision offers the best option.

(DFID 2011)

Parallels between the school reform debate in the United States and those centring on the world's poorest countries have to be drawn with caution. The contexts are very different. Yet there are some strikingly recurrent themes. As the DFID quotation at the start of this section indicates, major donors are exploring opportunities to strengthen the role of the non-state sector. The World Bank's recent education strategy also emphasises the critical role of the private sector as an education provider (World Bank 2011). Part of the rationale for looking to non-state providers can be traced to state failure: public education systems in many of the poorest countries combine limited access with poor-quality learning.

Another motivating factor is the broader conviction that more market-based systems offer intrinsic advantages. One senior World Bank economist has concluded that 'the current picture internationally is that involving the private sector can improve school performance through competition, accountability and autonomy' (Patrinos 2011). The accountability and higher standards are assumed to derive from expanded choice and responsiveness to fee-paying consumers. Further towards the libertarian end of the political spectrum, other commentators have pointed to the growth of low-fee private schools serving as evidence that public policy should actively promote and support market-based provision (Tooley *et al.* 2010). These schools, it is claimed, 'significantly out-perform children enrolled in state-run schools despite much greater teacher salary expenditure in the latter' (Tooley *et al.* 2011). Advocates for an expanded role of these and other private schools have called on donors to use their aid budgets to provide support, and to finance student demand through vouchers and other measures. The preferred reform package often includes recommendations in favour of replacing teachers hired on civil service contracts with lower-cost contract teachers enjoying weaker – or 'more flexible' – employment rights.

None of these arguments is new. What is new is the political momentum gathering behind more market-based approaches to education reform. On one reading of the evidence from the American school reform debate, deeper engagement on the part of corporate philanthropists will add to that momentum. But does the evidence back the drive to expand the role of non-state providers?

What is not in dispute is either the scale of state failure or its consequences. Inadequate public sector provision has drawn many millions of poor children into low-fee private schools, especially in South Asia (Srivastava 2006). In slum areas of cities such as Lagos and Nairobi, the education landscape is dominated by such schools. Some studies have found that low-fee schools have lower rates of teacher absenteeism, that they outperform public schools, and that they are the preferred option for poor parents (Das, Pandey and Zajonc 2006; Kingdom 2005). Teachers in these schools are paid substantially less than those in public schools, prompting some commentators to conclude that there are potentially large efficiency gains to be made by lowering teacher salaries.

Set against these findings, advocates for private education often turn a blind eye to wider research evidence. The level of education provided by low-fee private schools, many of which are at best weakly covered by regulation, is abysmal. Most teachers are untrained, schools are often unsafe, and textbook provision is limited (Harma 2011a). In the case of India, performance in the cheapest private schools accessible to the poorest families does not differ greatly from that in public schools (De *et al.* 2009). Moreover, while fees may be low in an absolute sense, so are the incomes of the communities they serve. Putting children into low-fee schools imposes a significant burden on the poorest households and excludes many children, notably (in the South Asian context) girls and those from low caste backgrounds (Harma 2009; De *et al.* 2009). Given that household survey evidence consistently points to inability to afford education as a major barrier to entry for out-of-school children, fee-charging does not have positive implications for

equity. There are also question marks over the degree to which the low-fee school model could be scaled up. Even commentators sympathetic to the model have recognised that the pool of teachers willing and equipped to teach at lower wage levels is limited (Andrabi *et al.* 2008). Moreover, evidence from West Africa suggests that the move towards contract teaching has been associated with a dilution of standards and reduced learning achievement levels (UNESCO 2009).

Advocates for market-based approaches point to a range of mechanisms through which governments can expand demand for private schooling while protecting equity. These range from student loans and stipends to grants and voucher systems (Patrinos 2009; Patrinos 2002). The dearth of credible impact evaluations and the small scale of many projects make it difficult to assess some of the more sweeping claims that have been made. Evidence on vouchers from large-scale or national programmes in Chile and Colombia does not back the claim that such schemes have produced unequivocally positive outcomes for learning achievement or equity (for a review of the evidence see IIIIE 2010 and UNESCO 2009). In the case of Chile successive waves of protests by school and university students against an education system seen as unfair and poor quality tell their own story.

The debate over 'private versus public' schooling in the poorest countries will doubtless continue. For corporate philanthropists engaging in that debate, a useful starting point is to recognise that, whatever the case for private provision in high-income countries, circumstances in the poorest countries demand a more circumspect approach. If the aim is to develop an education system capable of delivering education of decent quality to all children, then the overwhelming priority is the development of a public education system that offers free education to all. The challenge is to ensure that the public system is equipped to deliver. If the state education system is broken, then the immediate priority is not to bypass it but to fix it by reforming the institutions, incentives and public spending systems through which it operates. This is the model adopted by the Sir Ratan Tata and ICICI Inclusive Growth foundations in India – and it is one which should guide corporate philanthropy more widely.

Conclusion and recommendations

Slow progress towards the international development goals in education has far-reaching and profoundly damaging consequences. Beyond the immediate effects on human wellbeing, it is undermining efforts to achieve the wider Millennium Development Goals, reinforcing extreme inequalities between and within countries, and dampening economic growth. Accelerating the pace of advance towards education of decent quality for all should be a central priority for corporate philanthropy. Yet the track record to date leaves much to be desired. The philanthropic effort in support of education in the poorest countries has been limited, fragmented, inefficient, and weakly linked to international development goals. While deeper engagement would have the potential to deliver significant benefits, the terms of that engagement are also important.

There are no blueprints for successful corporate philanthropy in education. This paper has identified some of the problems with current approaches, as well as some islands of good practice. Comparisons between health and education are instructive, not least because they highlight the critical role of the multilateral aid architecture in facilitating – or hindering – effective corporate philanthropy. Looking ahead, the question facing governments, donors, NGOs and the philanthropic community, is what approaches to corporate philanthropy in education are likely to deliver the strongest results. To some degree, that question has to be assessed in the light of the

expertise, resources and competencies of specific companies and philanthropic foundations. But the argument set out in this paper suggests five broad guiding principles.

- **Scale up support for education.** The limited financial support channelled to education through corporate philanthropy is symptomatic of a wider failure to engage with the education for all agenda. Given the central role of education in enhancing wellbeing and facilitating progress towards wider development priorities, its marginal status on the corporate philanthropic agenda is counter-productive.
- **Work through public education systems and strengthen coordination with governments.** Too much corporate philanthropy in education takes place through company-based schemes and small projects operating outside of national education strategies. This is a high-cost, low-impact mode of delivery. The type of approach developed by the Sir Ratan Tata Foundation and the ICICI Inclusive Growth Foundation in India, with an emphasis on strengthening public education, is more efficient and has the potential to leverage wider change through good practices adopted by national institutions.
- **Focus on learning and equity – and avoid promotion of private sector ‘quick fixes’.** Education policy is a highly contested area in all countries. Governments and civil society in the poorest countries have to determine reform paths through national debate. The overwhelming challenge is to raise learning standards and strengthen equity. Corporate philanthropy should be geared towards these goals. It should scrupulously avoid the promotion of ideologically loaded prescription in favour of market-based solutions, and the transfer of a US-style school reform model to countries lacking the institutional capacity to ensure equity.
- **Support a global fund for education that draws on best practice from the health sector.** A stronger multilateral aid architecture would help to facilitate more effective corporate philanthropy. It would lower transaction costs and extend the range of countries benefiting from philanthropic engagement. Moving away from the current FTI model, with its over-reliance on World Bank reporting systems, and towards a Global Fund model through which the private sector is more actively involved in financing and delivery at the country level, would greatly enhance prospects for strengthened impact.
- **Engage in education for all advocacy.** Working through individual company systems, philanthropic foundations and the global health funds, corporate philanthropy has played a pivotal role in keeping health at the top of the international development agenda. The Global Business Council for Health has played an important role in supporting and facilitating advocacy by a broad network of companies. The Global Business Council for Education created in 2011 should seek to emulate that role. But its success will hinge on active engagement by senior figures in the corporate community.

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