Non-formal education and basic education reform:
a conceptual review

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Foreword to the series

At the World Education Forum, held in Dakar in April 2000, the international community reaffirmed its commitment to ensuring universal access to basic education of high quality by the year 2015. Efforts have led to noteworthy increases in school enrolment. In spite of progress achieved, however, a high proportion of children still do not have access to education, while others drop out of school. It is clear that merely increasing resources and augmenting the capacity of school systems is inadequate to deal effectively with the problem.

In its research project on quality basic education for all, the IIEP looks at different innovations aiming to improve the provision and functioning of basic education so that it becomes more flexible and more open to the varying needs of children and adolescents who are out-of-school or in difficult circumstances. Such innovations include:

- all programmes that aim at increasing the 'educability' of children before or while they are attending schools, through health and nutrition programmes;
- non-traditional teaching experiments carried out in every part of the world that use alternative forms of organizing education and training, different teaching/learning methods and assist children and adolescents to struggle against exclusion;
- different management methods that allow communities to have a better say in the conduct and organization of education of their children.

It is hoped that these innovations will expand and influence the way the traditional education system is organized and managed.

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List of abbreviations

ADEA	Association for the Development of Education in Africa
AEF	Africa Educational Trust
AIDS	Acquired Immuno-Deficiency Syndrome
BRAC	Bangladesh Rural Advancement Committee
CBO	Community-based organization
COBET	Complementary Basic Education in Tanzania
CONAFE	*Consejo Nacional de Fomento Educativo*
COSDEC	Community Skills Development Centre
DFID	United Kingdom Department for International Development
ECCE	Early childhood care and education
EFA	Education for All
HIV	Human Immunodeficiency Virus
ICT	Information and communication technology
IIE	Indian Institute of Education
MiET	Media in Education Trust
NFE	Non-formal education
NGO	Non-governmental organization
SCF	Save the Children Fund

SERVOL	Service Volunteered for All (social services and community development organization in Trinidad)
Sida	Swedish International Development Cooperation Agency
SSA	Sub-Saharan Africa
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development
WGNFE	Working Group on Non-Formal Education

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Introduction

1. Background

In the current international context of Education for All and the Millennium Development Goals, writing another paper on non-formal education (NFE) almost seems like flogging a dead horse. With most governments – particularly in the South – and development agencies committed to ensuring access to quality education for all children, as well as extended provision for youth and adults, it might seem that the days of non-formal activities outside the purview of the formal system are numbered.

Yet it is increasingly evident that amidst all the efforts to profile formal basic education, especially in the wake of the Dakar Conference (2000), the numbers and range of non-formal initiatives continue to grow. Non-formal education has not only increased exponentially in the North – linking it up with a new upsurge of interest in lifelong learning – it has also expanded rapidly in the South, moving into areas where its presence was frowned upon in the past, for example that of initial education for children. Since in many places formal primary education is also changing, we find that often in the process some of the differences between formal and non-formal education have started to become less defined.

As Rogers (2004) noted, the attention given to non-formal education during the 1990s was reluctant and far from wholehearted. It was the 'poor and badly dressed guest' at the education table, whose presence was hardly desired and who no one knew quite how to approach. As the post-Jomtien era has focused almost exclusively on formal education, governments and agencies have shown little interest in non-formal education – with the

notable exception of agencies being concerned about the *social* conditions of marginalized children and young persons, such as the United Nations Children's Fund (UNICEF) and Save the Children (SCF).

The post-Jomtien neglect was also evident in the near absence of non-formal education from the agendas of many education ministries' planning directorates and from the list of priorities in jointly-designed (government-donors) sector development programmes. This was in spite of frequent criticisms from civil society organizations and education specialists pointing to the importance of non-formal education for satisfying a wide variety of educational needs and to the urgency of both co-ordinating such a diverse educational field and providing financial and policy support (Bhola, 1984; Carron and Carr-Hill, 1991; ADEA/WGNFE, 1999*b*, 2001, 2005*b*; UNESCO, 1997; Lauglo, 2001).

It appears, however, that in the present, post-Dakar decade, the tide is turning once again. There are signs that non-formal education, at different levels and for different beneficiary groups, is gaining new momentum. In the past few years, several development agencies, including the Swedish International Development Cooperation Agency (Sida) and the World Bank, have been reassessing their position on adult education (Lind, 2002; Torres, 2003; Oxenham, Diallo, Katahoire, Petkova-Mwangi and Sall, 2002; Rogers, 2004). Other agencies besides UNICEF and SCF have begun to strengthen their support for the provision of non-formal education to children and youth, such as the United States Agency for International Development (USAID), the Netherlands, Ireland and Switzerland. More significantly, ministers and ministries of education are showing increased interest in the nature, quality and purpose of non-formal education, including the revision of the role of the state in its development (ADEA/WGNFE web site [www.adeanet.org/wgnfe/]; Rogers, 2004). In many countries of the South, new programmes have been, or are being, launched with a view to reaching previously disadvantaged or excluded groups using non-formal approaches.

These are sometimes labelled 'non-formal', sometimes 'formal'. The momentum is strongly enhanced by the increasingly effective participation of civil society organizations in the planning and development of education sector programmes in different countries.

The current Education for All (EFA) agenda provides the best opportunities yet to re-visit and re-write the agenda for basic educational reform. In recent decades, initial formal education for children and adults has been subjected to many changes and as a result of greater community involvement, decentralization and changes in the resourcing of education, formal and non-formal forms of basic education increasingly resemble each other. There is also a much broader recognition of the educational needs and rights of large groups of disadvantaged and vulnerable children, and hence also of the (potential) benefits of non-formal alternative programmes or supplementary initiatives that help such children attend regular schools.

The debate on non-formal education is stronger now than it has been since the 1970s. But while there is increased acknowledgement of the importance of the myriad of educational initiatives outside the formal system, there are widely diverging positions on their significance and on what to do with them. Positions differ in particular with regard to the very usage of the term 'non-formal education' – its defining characteristics; its distinct relevance for a wide array of current or prospective beneficiary groups; its impact on the lives of the participants; the quality and relevance of what tends to be on offer in pedagogical but also in social, cultural and/or economic terms; the benefits of diversity versus increased homogeneity; the desirability of systemic links with their formal counterpart programmes; and the role of the state and the latter's relationships with civil society organizations and communities.

It is significant that there is now, more than ever before in the history of non-formal education, an interest in the programmatic and socio-political location of non-formal education within the wider totality of (basic)

education provisions: Whom do the initiatives serve? With what degree of legitimacy? Under whose control? With what distinctive approaches and methodologies? And for what purposes? Such holistic perspectives express themselves in the context of educational reform or other efforts to redefine the totality of education or learning as the wider education system or as a learning society. Among other things, they reflect a broader concern with human rights issues, issues related to social exclusion and the promotion of social cohesion – discourses that became prominent during the 1990s. But they also stem from practical considerations of how to manage this vast array of learning opportunities and how to divide responsibilities between the state and other partners, and between the national and decentralized levels.

Unfortunately, the debates are taking place in an environment that is rich in ideological bias (neo-liberalism, radical democratic) but poor in adequate information and knowledge. The state of analysis of non-formal education experiences did not improve significantly during the 1990s. There was a good deal of regurgitation of data collected on 'star' projects around the world during an earlier period Some new analytical work has been undertaken by ADEA (through its Working Group on Non-Formal Education), by IIEP (through its programme on Alternative Strategies for Disadvantaged Groups) and by agencies such as UNICEF. Yet there is still very little analysis done of the (comparative) *internal dynamics* of non-formal initiatives and their *articulation* with the social, economic and cultural environment. Thus there is still an insufficient knowledge base with which to underscore important new ventures in educational policy or the development of new methods and approaches in educational planning.

2.   The focus of this paper

In the above context, this paper intends to: identify the problems of non-formal education within different socio-economic contexts in relation

to the changing landscape of basic education as a whole; review the range of current practices; and raise some pertinent issues as a basis for policy analysis and further systematic research and development work on non-formal education and basic education in general. Its objectives are therefore as follows:

(a) to provide an outlay of the meanings and roles of non-formal education that stem from different intellectual and ideological perspectives;

(b) to present a review of a range of current manifestations of non-formal education and their significance in educational and socio-economic contexts;

(c) to indicate key areas of articulation between non-formal forms of education and the education field as a whole; and

(d) to identify sets of pertinent issues that are relevant for policy development and planning and for further research and development work on non-formal education, but within the context of the (basic) education system as a whole.

Given the wide variation among educational initiatives that are currently labelled as non-formal education, this paper will largely address non-formal education in the context of *initial and continuing education or learning for children and young persons*. Thus, it will not dwell on educational provisions for adults, except where these have relevance in the context of catering for the needs of young persons. This is not because adults are less important as learners; but rather because in practice the needs, interests and aspirations of children and young people *vis-à-vis* education and training tend to be different from those of adults.

While the paper will maintain a global orientation and consider educational perspectives across different regions, emphasis will be on the conditions and problematics of non-formal education and educational development in the South; i.e. the less-industrialized countries in Latin America, the Caribbean, Africa, and Asia and the Pacific.

The basis of this paper is that over the past few decades, the realities of this universe of 'non-formal' educational initiatives have been such that it has responded to un-met learning needs of relatively large numbers of people, and that in all its diversity it has *de facto* become a hothouse for all kinds of new visions, forms, approaches and methodologies for learning, and thus a source of innovation and revitalization for education as a whole. The major concerns are how such initiatives can grow and become integrated and sustainable parts of the overall field of diversified basic education, and how policy-makers and planners can interact with this wider field with a view to improving education's alignment with widely shared current international principles. Such principles include the following: responsiveness to learners' needs and interests; the interconnectedness of educational opportunities; respect for human rights; the promotion of equal opportunity for all; a culture of democracy and respect for diversity; and the establishment of effective forms of partnerships among stakeholders.

3.   Outline of the paper

The organization of the current paper will follow the order of the objectives presented above. Each chapter will deal with a specific set of issues.

Chapter 1 deals with issues of definition, types of non-formal education and the inherent tensions between formal and non-formal education. It ends with a schematic representation of the educational field and the location of different types of non-formal education *vis-à-vis* the formal system.

Chapter 2 explores the evolution of meanings attributed to non-formal education during the development decades, the roles envisaged for non-formal education in the development process and the different existing types that have been prominent – including at present – and their characteristics.

Chapter 3 then presents selected examples of current non-formal education initiatives, implemented throughout the southern countries, that speak of the different types that are relevant for the educational development of children and young people.

Chapter 4, building itself on the examples and discussions in the previous chapters, dwells more deeply on the relationships between non-formal education and the formal system, analyzing the institutional dynamics and the roles that various actor groups play in the changing landscape. It also outlines the elements of a systemic framework and various principles on the basis of which a reform of the basic education system as a whole can be pursued.

Chapter 5 concludes by setting out key challenges for policy-makers and planners, and for the public in general. It then reviews an agenda for action in the policy and planning fields, and concludes with a range of issues that merit further research and development work.

Chapter 1
Categories and dynamics of non-formal education

1.   The definitional issue

In recent years, terminology has once again become a prominent issue. Some specialists are arguing that the very term 'non-formal education' has lost its meaning and relevance altogether, because of both the current enormous diversity of forms and the difficulties in drawing a line between what is formal and what is non-formal, when so many initiatives show characteristics belonging to both. They prefer to drop both the term 'formal' and 'non-formal' and to either refer directly to different *programmes* of basic education or to subsume all forms under 'lifelong learning' (ADEA/WGNFE, 1999*a*; Rogers, 2004). Adult education specialists have made a case for dissociating their specialty from non-formal education and simply referring to it as 'adult education' (Bhola, 1998).

Such definitional discussions, however, seem largely restricted to educational specialists and expert meetings. It is striking how easily in practice governments and civil society organizations in the South continue to use the distinction as defined by Coombs and his colleagues in the early 1970s (Coombs, Prosser and Ahmed, 1973). In the North, where the term 'non-formal education' is rarely used, the term 'lifelong learning' has increasingly gained currency when referring to the totality of educational activities outside the school system (Field, 2000). It is also striking that, at country level, those involved with education (including parents and young people) appear to know precisely what belongs to the non-formal category and what this means to them. While there are strong commonalities across

countries, the precise demarcations tend to vary according to national realities (Carron and Carr-Hill, 1991).

Clearly it would be helpful for purposes of policy-making and planning to use categories that can justify distinct and differentiated interventions. In this context, the use of 'non-formal education' is unhelpful, as it continues to give the impression that all forms of non-formal education are basically the same and can thus be addressed and manipulated in the same manner. Equally, it can hide the similarities between non-formal and formal education that are also becoming a matter of interest in many countries. A judicious differentiation among forms or types of education by ministries, development agencies, research and other knowledge support organizations, in accordance with relevant criteria such as clienteles, educational needs and purposes or responsible authorities, could yield information that is more pertinent to problem and needs identification, and thus to the generation of appropriate policy responses.

A detailed mapping of different programmes is likely to reveal that even in poorer countries of the South, where resources are scarce, the educational terrain is much more complex than is perhaps assumed. The term 'non-formal education' has come to cover education (and training) initiatives as far apart as extension services for farmers, HIV/AIDS peer group support, community schools, functional literacy programmes, programmes for street children, 'shepherd' schools, entrepreneurship development programmes, language classes, multimedia community development centres, youth skills development projects, self-therapy groups, heritage centres, evening classes, computer courses, environmental awareness groups, and in-service courses for teachers.

These programmes have widely diverging characteristics, serve distinct purposes for different clienteles, have different relationships with a plethora of government ministries and – above all – have varying degrees of relevance for the pursuance of public policy in the broader social

development sphere or in the narrower educational sphere. Not least is the fact that they also vary from single small and localized projects to very substantive sub-systems with large volumes of learners and absorbing vast amounts of funds. Ministries of education and other sector ministries need to be very clear as to which of these forms and sub-systems should be of direct concern to them, and as to which ones demand policy intervention and for what purposes.

2. Types of non-formal education

Para-formal education

A significant distinction in non-formal education (hereafter referred to as NFE) is between those programmes that operate closely to the formal parts of the education system and may thus constitute a non-formal counterpart to a formal provision (for example a sub-system of non-formal polytechnics or of adult basic education) on the one hand, and non-formal initiatives that, whether large or small, are essentially short and problem-oriented training activities serving distinct and limited learning needs (for example, extension services and computer or language classes). Since those in the first category tend to run parallel to the formal system and often serve as substitutes for formal provisions, in which they mirror themselves, this category has been referred to as *para-formal education* (Carron and Carr-Hill, 1991: 21-23; Carr-Hill, Carron and Peart, 2001: 345).

The term 'para-formal education' comes from Argentina (Gallart, 1989: 15), where it has been usefully applied as a term for educational activities *in between* the formal programmes that follow the highly-organized, structured and full-time educational ladder and the array of loosely-structured, part-time out-of-school provisions. Para-formal activities are often sponsored by the education authorities and run parallel to the education system. Carr-Hill *et al*. defined them as "educational

programmes that provide a substitute for regular full-time schooling. The main objective of these programmes is to offer a second chance to those, who, for various reasons, could not benefit from the regular school system at the ordained moment" (p. 345). Such programmes include evening classes, official literacy and distance education programmes, private tutoring, certain programmes for street children, and forms of vocational and technical training (Carr-Hill *et al.*, 1991). Given our focus on children and youth, special mention in this regard should be made of community (or village) school programmes, major NFE sub-systems, Islamic schools, forms of mobile schools and home education.

Para-formal education programmes have in the past been generally initiated and run by non-governmental organizations (NGOs), often in collaboration with international technical or funding agencies. Some of these, like the Bangladesh Rural Advancement Committee (BRAC) in Bangladesh and the *Consejo Nacional de Fomento Educativo* (CONAFE) in Mexico, have been in existence for many years, having grown into vast systems that have also come to benefit from government grants. Presently, ministries of education are becoming more and more interested in directly initiating and administering non-formal systems in order to speed up EFA for the un-schooled (such as Complementary Basic Education in Tanzania, or COBET) or to reach specific categories of hard-to-reach children, for example those in nomadic communities (such as mobile schools in Kenya) and pastoralist communities (such as 'shepherd' schools in Botswana and Ghana). It has also become increasingly possible for such programmes to become joint ventures between the state and civil society covered by formal agreements, whereby the state recognizes the special contributions provided by NGOs in initiating and running programmes adapted to the needs of special groups and provides grants and professional support in return for adherence to quality criteria.

Because of their size and, in most cases, the importance attached to equivalence with their formal counterparts, this para-formal category of

education is highly relevant for policy purposes. The relation of such forms with formal certification is the very reason why some observers have felt that para-formal education is distinctly different from other forms of NFE. One of the latter's trademarks is considered to be its immediate relevance for personal or community life situations – a characteristic that is deemed to be undermined by a submission to examination requirements. Verhine made a distinction between NFE and what he termed 'extra-school education' (ESE), of which he notes that "although technically outside the framework of the traditional school, ESE includes certain efforts legitimately classified as formal education". Thus it provides formal education "via an alternative route" (Verhine, 1993: 5). Earlier, Bhola had suggested the term 'alternative formal education' (Bhola, 1983: 48).

Popular education

Another categorization of non-formal forms of education was proposed by Carron and Carr-Hill (1991). This included, next to the para-formal type, three other categories of NFE: popular education, personal development activities and professional training. This categorization was based on a set of studies on four countries (Argentina, Canada, Hungary and the former Soviet Union) undertaken in the context of the IIEP co-ordinated research programme on "the diversification of the educational field" carried out in the 1980s. *Popular education* was seen to be located at the other extreme of the educational field, where there are activities that explicitly try to stand aloof from the formal school system, if not at times oppose the basic principles of its functioning (Carron and Carr-Hill, 1991: 23). The main characteristics were seen as concentration on the poor, a learning-by-doing approach, high levels of structural flexibility and a constant pre-occupation to adapt the learning activities to the changing needs of the users. It was noted that these activities are those that most resemble the original ideas of the promoters of NFE in the late 1960s and 1970s (Carron and Carr-Hill, 1991: 23).

Popular education is directly associated with a distinctly Latin-American movement that emerged in the 1960s and 1970s to search for alternatives to human-capital-oriented forms of non-formal (adult) education. A central component here has been awareness raising or the psychosocial pedagogy typically associated with Paulo Freire that is used to transform participants' perspectives on their social reality (La Belle, 1986: 169). La Belle argued that popular education needs to be treated both as a special type of NFE, as it is intended to combine critical awareness, literacy and other basic skills, and as an open-ended means for social action. According to DeKadt, the awareness-raising method was developed by Freire as a rejection of mass education, which he felt imposed silence and passivity, stifled criticism and made participants objects rather than subjects of reality (DeKadt in La Belle, 1986: 171).

Although popular education has remained associated with social action for structural change, in more recent years it has tended to become less oppositional, seeking collaboration with the state in working for social change. This has also led to more emphasis being placed both on the pedagogical process within a context of democratization in the education system and on collaboration with formal public schools (Van Dam, Martinic and Peter, 1996). Outside Latin America, popular education has sometimes become the collective label for a variety of educational activities, often carried out by local authorities or social movements, promoting the management of lifestyles and living conditions at both individual and community levels, and raising awareness on socio-political issues – as in Canada and Sweden. They often have an element of political mobilization in that they lead to a questioning of existing social relations (Carron and Carr-Hill, 1991; Field, 2000). Other examples of popular education, however, suggest that the rift between the formal system and schools following a popular education approach may not be as wide as it may seem, as many also appear keen to maintain a direct link (see *Chapter 3* below).

Personal development

A major upsurge in many countries, but especially in the North, has been in the NFE category of 'personal development'. This is defined as education programmes covering a range of learning practices organized by cultural institutions that promote leisure-time activities. It includes a market approach whereby different courses are sold either for direct consumption or as human capital investment (Carr-Hill *et al*, 2001: 348). For Field (2000), these are the terrain of *new adult education*, with its wide range of forms: highly individualized, more privatized and more ephemeral. Residential short courses, study visits, fitness centres, sports clubs, heritage centres and self-therapy programmes are the most typical types of personal development. Here the purpose is to improve oneself and to struggle with oneself and one's intimate relationships (rather than against oppressors). These programmes constitute typical forms of lifelong learning in the North, as they satisfy a need to utilize (expanded) leisure time and income, and respond to widespread needs to give meaning to one's life (Field, 2000: 45-49).

Professional and vocational training

As a category in the NFE domain, non-formal professional and vocational training – as different from those forms subsumed under para-formal education – covers all training outside the formal or non-formal forms of *initial* skills training leading to recognized national diplomas. Thus, it includes on-the-job learning, artisanal or informal sector apprenticeships, agricultural or industrial extension services, entrepreneurship development programmes and all forms of in-service skills development, upgrading or re-skilling, as well as similar programmes launched for the unemployed in the context of re-employment or flexibilization of the workforce. In as far as courses do not lead to recognized diplomas, this category also includes the many industrial, commercial or artistic programmes offered by private schools and colleges, whether officially registered or of the 'fly-by-night' variety.

While in the North the registered types have increased exponentially in number in the wake of economic restructuring, deregulation and labour market flexibilization, in the South all types of skills development have significantly increased in size (Field, 2000; Gallart, 1989). In many countries, the major source of non-formal skills development has become the informal sector of the economy, whether through forms of traditional apprenticeship or otherwise (King, 1990).

Non-formal vocational training programmes have, for several decades, been very important for young people who, with any level of basic education, have attempted to make the transition from school to employment. In the past, such programmes tended to mirror their formal system equivalents and often succeeded in placing graduates in work due to the perceived advantages of providing hands-on skills development. In more recent decades, however, with the stagnation of formal-sector growth and growing poverty, such training has often lost much of its benefits, at least for youth from poorer backgrounds. Current non-formal training tends to take place more often on-the-job and much closer to where there is demand, such as in the informal sector. In many countries – but particularly in those with a higher rate of informal sector organization, as in West Africa – skills training is organized by producers' associations, local employers or local authorities in direct response to economic needs (Atchoarena, 1998). Furthermore, there is a much greater array of training offered by private sector suppliers, with an emphasis on personal services and information and community technology (ICT)-related skills. As a result, young people are faced with ever-higher costs of skills training.

Literacy with skills development

At the same time, there has also been a growth in another type of non-formal training, which is a combination of literacy with skills development. This combination is not provided by the private sector, but rather by adult education NGOs and sometimes by the state or local authorities. This type

of NFE has existed for quite some time and there are programmes that have been shining examples for several decades of what can be achieved by providing integrated support services for disadvantaged youth, preparing them for life and for work (such as Service Volunteered for All – SERVOL in Trinidad).

It appears that in recent years this type of NFE has attracted fresh attention from NGOs and governments, particularly in situations where there are large numbers of young people with insufficient or no schooling, who are too old to be accepted into the formal system and whose conditions of poverty and marginality are such that they require specific combinations of training and personal support to ensure their survival. Usually such programmes combine (functional) literacy training with life skills, orientation to self-employment and income-generation skills. Governments are becoming involved in a bid to provide some form of relevant basic education for hard-to-reach young people in vulnerable situations, such as programmes for street children and patronized schools in Thailand and the 'Alternative Learning Opportunities' programme in Lesotho.

It is significant that such programmes have come to play an important role in post-conflict countries facing major challenges of rehabilitation, resettlement and reconstruction, such as Liberia and Sierra Leone. Here, integrated youth development programmes not only provide literacy and numeracy skills and livelihood training; as a result of their incorporation into broader socio-economic and political development programmes they also deal with civic and peace education, environmental degradation, poverty reduction, HIV/AIDS and community reconstruction (Thompson, in ADEA/WGNFE, 2005*a*).

Supplementary NFE programmes

An important variant of the above type of NFE for younger children is what could be referred to as 'supplementary NFE programmes'. These are

programmes that provide supplementary support services of different kinds to specific groups of disadvantaged children who are still in a position to attend school. These groups include children in vulnerable situations as a result of conflict, internal displacement, poverty, family circumstances or abuse. Among other groups, they include orphans, abandoned children, refugee children, street children and those affected by HIV/AIDS. By combining formal education with an external non-formal support component, these programmes not only link the school more effectively with its social and institutional environment, but also make cost-effective use of the advantages of both formal and non-formal components within a single overall programme.

Support services are specific to the situation of the child and are supplied not by the school, but rather by government, NGOs or community-run programmes. Such support may be in the sphere of personal counselling, food and nutritional support, childcare, protection, provision of shelter or medical support. It may also include supplementary skills development, for example in health or life skills. In a wider context of increased poverty, marginalization and conflict, and the inability of families to cope with the problems faced by their children, government departments and civil society organizations engage in such support services in order to assist in rehabilitation and to enable such children to effectively benefit from education (Piromruen and Keoyote, 2001).

Equivalent programmes for industrialized countries are those where there is a comprehensive effort to link certain types of schools directly with a range of other sector-support services that are essential to enable disadvantaged youth to succeed, such as the concept of the 'broad school' in the Netherlands and of 'full service schooling' in Australia (Henry, 2001).

In the same category of programmes, one may also place those initiatives whereby formal schools or educational authorities arrange for supplementary out-of-school education components, such as work

experience, work-orientation programmes, entrepreneurship development, life skills development programmes or various remedial activities, provided either by professionals (such as artisans) or volunteers in the community or by special government or non-governmental bodies. School-work linkages are not new, but they appear to receive fresh attention where, in the context of EFA, there is an interest in broadening the life orientation of young people. They also respond to situations in which working children cannot attend full-time schooling, producing initiatives to 'bring the school to the learners', such as the phenomenon of 'market schools' in Nigeria.

Early childhood care and education

One important type of NFE that is often omitted from overviews is early childhood care and education (ECCE). While in many countries in the South, especially in urban areas, a pre-school version of ECCE has made much headway, the overall majority of young children of pre-school age either receive no structured form of early learning development or are absorbed into many different versions of home-based or community-based care. It has been noted that children from disadvantaged backgrounds are more likely to be excluded from ECCE, as access is closely associated with the level of a country's development (UNESCO, 2004).

While pre-school versions could be regarded as part of para-formal education, home-based care belongs much more to the fully non-formal domain of education. Here ECCE tends to be provided by parent or community groups offering as much of a structured environment for young children as they can in line with their traditions or insights into what is the best way of supporting early development. There are increasing numbers of NGOs that provide professional development support or other back-up services to strengthen the quality of the work in these groups. It is generally recognized that the main emphasis here is not on adhering to formal standards, but rather on improving the relative quality, as this needs to

be negotiated among parents, practitioners and policy-makers (UNESCO, 2004: 56).

The above categories relate to NFE in a general sense, regardless of their clientele. If one looks explicitly at the current rates of participation of children and young people, then the significance of several categories stands out; notably forms of para-formal education (or training), supplementary NFE programmes, forms of professional and technical training, and literacy with skills development. In *Chapter 3*, examples of several of these NFE types are provided. In any case, a distinction among categories or types of NFE is primarily of interest from a heuristic perspective. It offers a differentiation at a *particular point in time* that is convenient for policy-planning and/or administrative reasons, and which, moreover, can vary from region to region and from country to country.

3. The dynamics of formal and non-formal education

Having pointed to the relevance of differentiation and the distinctions among different types of NFE within the context of a broader field of basic education, it is also important to dwell on the wider rift that exists between formal and non-formal education. This is of relevance if one is to assess the socio-political dynamics of NFE.

In discussing what would be lost should the NFE discourse be abandoned, Rogers (2004) noted two specific challenges posed by NFE: (1) it points to educational opportunities outside of the formal education silo, i.e. education as defined by governments and donors; (2) it maintains a sense of the need for innovative and flexible modes of education (p. 249). To be sure, the notion of being separate from the government-controlled system of education, as well as the notion of flexibility, has for a long time appeared to be at the heart of NFE and thus featured strongly in any definition of the latter. Yet, returning to the discussion at the beginning of the chapter, one

may argue that there will always be NFE discourse at the people's level. This would still be the case if, for policy and planning reasons, other more professional discourses (for example on para-formal education, integrated basic education or the learning society) became more prominent. Moreover, this would also still be the case irrespective of the *terms* being utilized to refer to what is generally subsumed under NFE.

The thinking behind this assertion stems from the reality that essentially what has come to be referred to as NFE constitutes traces, adaptations and leftovers of learning systems that have always belonged to people's learning the world over. Coombs and other writers have pointed out that forms of what we now call NFE used to transmit a heritage of values, customs, beliefs, technologies and skills to new generations, such as through puberty rites, religious ceremonies and occupational apprenticeships (Coombs, 1976: 282; Wilson, 1997). In Europe, North America and much of the South, it has only been in the last two centuries that forms of people's learning were overtaken and, to a greater or lesser degree, replaced by an age-graded, hierarchically-structured and certifiable model of education propagated by the state. Such forms of formalized education have been part of history in other countries around the world (as in classical China and India), serving very particular purposes in state administration or in religion (e.g. Bourdieu and Passeron, 1990; Narayana, 1997). In these contexts, NFE reflects the power and impact of such systems, as the latter marginalize other forms of learning and, in turn, provoke new responses in the area of people's education. Equally, the open terrain of NFE incites external actors to instigate their own learning programmes.

Different writers have commented on the historical significance of schooling as an instrument in the state's expansion of administrative control and surveillance over the mass of the population and, more recently, its role in uniting the local, national and global levels through common pedagogical practices and legitimized knowledge. This development has

been directly associated with increased hierarchization of the social and cultural order, both nationally and internationally. In this perspective, the core characteristics of the formal system, as imposed by the state for national purposes, are: the promulgation of a national standard curriculum; the establishment of sanctioned institutions of learning; and the linking of selected forms of education with national systems of examination, qualification and certification, thus creating backwash effects on curriculum and pedagogy. Consequently, the flexibility, diversity and lack of structure of NFE constitute mainly derivatives of a central condition that people's learning remains outside the boundaries of state control and are thus exempt from such formal mechanisms. This does not negate the fact that forms of NFE tend to informally slide into an educational hierarchy directly related to a hierarchy of the social order. Forms of NFE, however labelled, have come to define themselves with reference to what is constituted as the central national system (Popkewitz, 2000; Bourdieu and Passeron, 1990).

The above underscores the point that in a diversified educational field, in which various types and forms of education can exist side by side and interact with one another, a central distinction between what is formal – and thus abides by organizational and curricular rules imposed by the state – and what is non-formal – and thus more or less exempt from such rules – remains. It also underscores the fact that the growth and decline of the two domains, their nature and their purposes, the degree and format of their interactions, and the extent of the state's involvement in non-formal forms of education heavily depend on the historical conditions and socio-political forces that influence policy formation and people's preoccupation with education. Furthermore, the historically very different purposes of formal and non-formal education have strongly influenced lasting perceptions about the inferior status of NFE in the minds of policy-makers and the public. They have also shaped the long-standing association of NFE with poor and marginalized populations, women and the unemployed.

In their summary of four case studies dealing with a variety of education systems (including in three countries in the North, of which two were former Soviet states), Carron and Carr-Hill recorded two "great waves of diversification" (i.e. expansion of NFE) since World War II. They found that the first wave (1945-1975) involved the rapid development of forms of out-of-school and adult education, created to supplement regular formal education within the sphere of the prevalent strategy and planning of education (i.e. *para-formal forms* of NFE). The second wave, as of 1975, has been characterized by a weakening of the formal characteristics of the supplementary education system and an expansion of *non-regular education*, i.e. forms of NFE outside the control of central planning. They note that overall there was a substantial shift in the roles of NFE away from playing a *parallel* or *substitute* role towards that of an essential *complement* to the rigidly-organized programmes of the regular school system. Although the analysis was primarily based on data for Hungary, the authors noted that similar patterns of growth in NFE could also be found in the other three countries (Carron and Carr-Hill, 1991: 14-17).

In this paper, an attempt is made to apply the notion of waves of NFE for the analysis of broad developments in this domain, with special emphasis on the present configuration of various types of NFE and their underlying philosophies, functions and dynamics. Discussions will be centred particularly on the extent to which a new wave emerged during the 1990s in the context of a revaluation of the significance of formal schooling associated with the EFA movement. This gradually placed fresh emphasis on para-formal forms of NFE while retaining complementary forms of NFE for very specific purposes in the preparation of children and young people for life.

The notion of education as a fairly fluid field, with a dominant formal system and a constantly evolving range of more or less non-formal types, each of which has its own changing range of forms and shifting interfaces

between the formal and the non-formal parts as well as changing patterns of interactions, could schematically be represented as follows:

Figure 1.1   Schematic representation of a diversified educational field
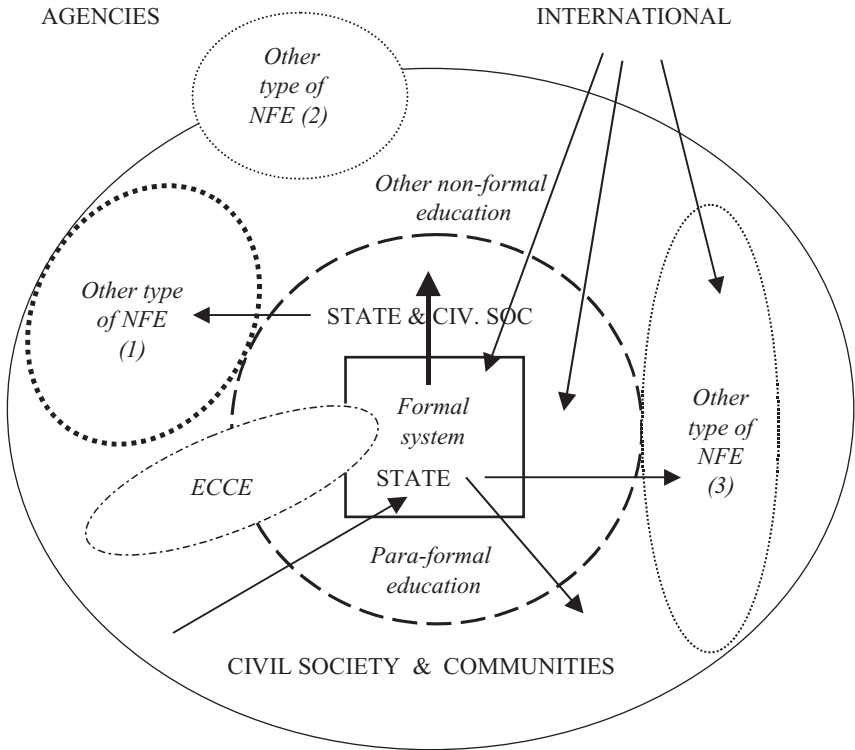

Figure 1.1 shows types of NFE in concentric circles, with a square box representing the formal and dominant part of the system in the centre. The circles do not claim to represent all forms of NFE as outlined in this chapter. The para-formal type of NFE encircles the formal system, as both tend to have a symbiotic relationship with one another. ECCE clearly cuts across

the different domains, as its largest part is in the 'other NFE' domain, while it also has pre-school components and sometimes a part that is officially absorbed into the formal system (such as in South Africa). Other types are more in the margins of the system: 'other type 1' is popular education that maintains its autonomy yet keeps its links with the formal system; 'other type 2' has one foot outside the system, as it represents those forms that combine NFE with developmental practice; while 'other type 3' represents forms that are independent of the formal system and have strong links with external agencies, such as NFE forms of vocational training and literacy with skills development programmes. Boundaries have different degrees of openness and permit more or fewer influences from outside parties. Clearly, their boundaries and relative sizes are shifting all the time.

As will be discussed later in this paper, the relative roles of and pressures exerted by different actors (state, civil society) in these types also vary. The pressure exercised by the state regarding the shape and substance of para-formal forms of education is very important, and in the reverse direction are civil society pressures regarding the re-shaping of the formal system. This makes the para-formal terrain a significant interface zone, not only for contestations between different actors, but also for dialogue and initiatives for collaborative action. However, in the poor countries of the South all this tends to take place under the watchful eye of international funding and technical agencies. Many of them – especially since the 1990s – maintain a direct influence over the different domains of education, but have a particular interest in the more formal parts of the field.

Chapter 2
Meanings and roles of non-formal education

This chapter will explore the evolution of meanings attributed to non-formal education (NFE) during the development decades, the roles envisaged for it in the development process and the different types that have been prominent, along with their characteristics. The purpose is to highlight the changing configuration of NFE, with an emphasis on the present situation, as a basis for identifying the starting points for policy intervention and for further research and development work.

1.   The discovery of NFE in the South

The concept of NFE in the South came to be at a time when northern development organizations and specialists began to realize that global development was a very complex matter and that a greater diversity of strategies was needed to address the basic needs of the people. Policy-makers and development experts expressed particular concern over the attuning of educational goals to social development goals. It was noted that formal education was rather unwieldy as it had medium-term goals and its social products would not be available until quite some time after its inauguration. In a context in which many issues, such as food production, health needs and political participation, had to be tackled, one could not wait until all people had a basic formal education. Thus the development of 'short-term education programmes' capable of promising "rapid change and adjustment" was deemed imperative (Grandstaff, 1976: 302; also La Belle, 1986). Some years before, Coombs (1968: 178) had already warned that: "A developing country ... must use NFE not only to build upon the previous formal education of a small fraction of its citizens, but more especially to raise the economic and social level of the vast majority of its citizens who

never acquired literacy. The priority for such countries at present must go to work-oriented literacy and training programmes, which have an early impact on individual and national economic development". NFE was thus deemed to be of a different order, as it forms bridges to development.

Nevertheless, the development concerns produced much hefty debate among educationists about the nature of formal education versus that of NFE. The forming of the 'educated man' by the formal system was contrasted with the preparation for immediate practical results by NFE. Formal education was seen as only serving a small elite, whereas NFE had the potential of reaching the mass of the population (Grandstaff, 1976). While formal education was saturated with abstract contents structured in integrated sequences, NFE was firmly grounded in specific contents organized as small discrete units (Grandstaff, 1976: 303). Out-of-school education could "make a direct and low-cost contribution to development – especially in rural areas where most people in developing countries live" (Callaway, 1973: 16). Looking at problems of fit, Grandstaff concluded that, in the context of specific development programmes, non-formal learning would often be the most appropriate educational strategy and thus a better choice than formal education (Grandstaff, 1976).

At a deeper level, the debates during the 1970s were also centred on the social role of non-formal types of education. Coombs argued that NFE was not supposed to become a separate sub-system within education, seeing it rather as a "diversified flow of learning inputs" essential to the nourishment of development activities (Coombs, 1976: 288). In this sense, NFE was only *complementary* to formal education and could sometimes serve as *compensation* for its shortcomings and contradictions. He referred to the notion of NFE in the following words: "... providing an equivalent of regular school subjects and skills for the benefit of unfortunates who were deprived of schooling ..." is myopic and a "... mischievous misconception" (Coombs, 1976: 283). Yet, at the same time, many other educationists

and policy-makers had begun to regard NFE as a viable *alternative* or *supplement* to formal schooling. Thus, as Bock noted, the significant part of NFE became not its very existence, but its conception as "a new force through which educational and socio-economic change is believed to occur at both the individual level, and the vision of it as an exciting new strategy for combating poverty, ignorance, inequality, ill-health and oppression" (Bock, 1976: 348).

The result of this was that the debates on NFE came to be characterized by the same intellectual and ideological currents that characterized the debates over the social role of formal schooling. In this regard, Bock referred to the distinction between the 'functional' or the 'psychological deficit' models on the one hand, and the 'status-conflict' or 'structural-determinist' models of social change on the other (Bock, 1976: 349). While in the first model the causes of underdevelopment were primarily sought in deficient attitudes, competencies and behaviours, in the second the principal causes lay in the larger, world-wide structures. Key questions that arose were to what extent NFE could facilitate meaningful individual and institutional development by more effectively and more cheaply serving to remedy the competency deficit of sub-groups, and whether NFE constituted a 'reformist ploy' designed to maintain an unjust socio-economic order within countries and sustain conditions of external dependency. In the latter perspective, NFE might be even more inhibiting for the mobility prospects of the poor and the marginalized, as it would not provide the accepted and socially-valued certificates or the non-cognitive attributes necessary for 'promotability'. Depending on the extent of the success of NFE, it would be likely to defuse social discontent and prevent concerted demands for the restructuring of society (Bock, 1976: 350).

Bock (1976) pointed out that the pressures by the liberal and human-capital-oriented protagonists of NFE did not reflect a serious critique of the traditional goals and functions of formal schooling. On the contrary,

they affirmed the belief in a benign relationship between education on the one hand and development as 'modernization' on the other. NFE was merely considered to possess unique characteristics that facilitated the achievement of such goals almost as well as or at a cheaper price than schooling (Bock, 1976: 350). Paulston (1973) went even further, saying that the school system, as an imported model serving small elites, has in some countries become so inadequate that it is 'dysfunctional' to modernization.

Bock also drew attention to the institutional dimension of education. He pointed out that the effects of different forms of education on learners and society are greatly influenced by what he called the 'institutional rules' defining what schools or other education programmes are, who their graduates are and what positions they may occupy in society, and what kinds of people with what educational backgrounds are needed to manage them. These institutional 'charters' are associated partly with official regulatory frameworks and partly with general understandings, associations or images of an institutionalized service. They are, in the first instance, defined by the larger socio-political structures in a society, indicating how the institutional form articulates with other systems in society. Bock observed that the impact of education is thus not only derived from pedagogics and the curriculum, but also from the social power associated with educational institutions to transform the status and prospects of its graduates.

Such allocation and legitimation roles of education also apply to forms of NFE. The latter, however, are not associated with allocation to authoritative social and occupational roles and will therefore *not* serve as alternative mobility channels. According to Bock, the increased demand for NFE, in spite of its poor success rate, lies in its ability to resolve the "dissonance between people's disenchantment with the effectiveness of education and their belief in the substitutability of NFE for schooling in terms of certification" (Bock, 1976: 357-363).

The above would make NFE a convenient instrument by which governments could deflect pressure away from providing access to formal education and towards rewarding social and economic positions in society. In this way, NFE could help avoid social conflict over scarce resources. At the same time, it facilitates the extension of state authority and citizenship while producing only low levels of demand on the socio-economic system (Bock, 1976: 364).

2.   Emerging types of NFE

From the perspective of children and young people, the most significant move during the 1970s and 1980s was the development of a wide array of alternative forms of formal education, i.e. those that provide the same curricula, but by different means, at the elementary and secondary levels. These included part-time schools, correspondence schools, evening classes for adults, and later other forms of distance education using radio, television or cassettes. Their popularity as substitutes for formal education, ostensibly leading to equivalent certificates, was highly stimulated through frequent collaboration between governments and donor agencies. In socialist countries, equivalent initiatives produced vast shadow systems of formal education, ranging from elementary education up to university level (Bhola, 1983). Here, more than elsewhere, governments were the main instigators of such NFE systems.

Another type of NFE that experienced vast expansion was the voluminous and rather diverse NFE category of skills development for school leavers. This category has been prominent in most countries of the South, and its emergence was in many ways associated not only with the rapidly increasing imbalance between the supply of (primary) school leavers and the availability of modern sector jobs, but also with the changes in the world economy resulting from the oil crisis. In a human capital perspective, skills were rapidly identified as the crucial missing link between education

and employment (King, 1985). NFE appeared eminently suitable to fill this gap, as it could rapidly adjust to the needs of the urban informal sector and micro-enterprises, and could ensure very practical training, most often closely related to the work process.

Although this form of training was sometimes combined with elements of life skills and personal development, it was not intended as a substitute for primary education, even while over time more and more of its trainees would not have completed the school cycle. This was a form of complementary NFE in the 'Coombsian' sense, but it also illustrated Bock's thesis that for all the successes in the first decade in getting young people into work and earning an income, NFE tended to bring only marginal improvement to the lives of young people and generally did not produce social mobility (King, 1985; Hoppers, 1985). Nevertheless, this is the type of NFE that in many countries has come closest to being absorbed into the formal mainstream.

As referred to previously in *Chapter 1*, some traditions of NFE had an explicit structural orientation in that they focused not only on individual skills, knowledge and attitudes, but also on the rules and structures in the wider social system. This applies in particular to Latin America where, during the 1960s and 1970s, a narrow psychological (deficit) approach to NFE was increasingly re-directed towards an emphasis on both personal and social change (La Belle, 1976). In this context, NFE as a form of popular education became part of an effort to promote popular participation in education and collective action aimed at addressing the unequal distribution of power, privilege and resources. In contrast with more human-capital-oriented approaches, which emphasize the association of NFE with small-scale agrarian and industrial production directly linked to large businesses as providers of essential services, labour and markets, popular education was associated with a more self-reliant and community co-operation model of production. Popular education programmes during that period also attempted to transform rather than complement basic institutions in

society by developing alternative forms of economic and political ventures (La Belle, 1986: 182-183). Thus, in such cases NFE served directly as an antithesis to the formal system, linking it with alternative conceptions of socio-economic organization.

While, as noted above, popular education has been very much a Latin American phenomenon, somewhat similar efforts to create alternative conditions for learning, focusing on personal as well as socio-economic change, have been prominent in other regions as well. In Southern Africa, for example, the Botswana Brigades movement comprised conglomerates of units that included not only skills training for young people, but also a series of production workshops and a wide variety of development service units. This combined approach focused on the creation of new competences and values, and the establishment of vibrant, interdependent and self-reliant local economies as an integrated development strategy in the face of external dependency (Van Rensburg, 1974; Hoppers, 1986).

There is no clear explanation as to why such forms of alternative NFE did not become more widespread in Africa at the time. But the fact that – as Coombs did not fail to point out – most of the new forms of NFE originated in the West and were introduced, if not controlled, by Western-sponsored organizations may be significant in this regard. Such forms did not fit into the development planning paradigms advocated by most development agencies.

While, in the context of the development orientation of NFE, the main focus at the time was on adult education and on the forms of continuing education relevant for youth, basic education for children received much attention in many countries in the context of improving relevance for development. However, this effort was focused on introducing new curricula and pedagogical practices within the existing formal system, rather than on establishing new approaches outside the system. It expressed itself in the

many attempts to ruralize the curricula of primary schools and promote the relationship between schools and the local community (Bude, 1985).

In a number of countries, educational reform aimed at more fundamental revisions of how education interacted with society and how it could assist in national socio-economic reorientation. Here, new forms of primary education were often promoted in combination with elements of NFE that facilitated practical learning by children through development-related activities, such as Education for Self-Reliance in Tanzania and Gandhian Basic Education in India (Hoppers and Komba, 1995; Narayana, 1997). Although in later years, in the context of macro-economic and political pressures, these outreach innovations lost their progressive edge or even disappeared, the experience of integrating formal and non-formal components of education was still significant.

3. NFE and development in the North and the South

The 1970s also saw a major upsurge of NFE in the North (Carron and Carr-Hill's 'second wave'). It was during this time that the term 'lifelong learning' emerged as a new way of thinking about and structuring society's approach to education. Although, conceptually, lifelong learning was interpreted in a broader, humanistic manner as the ideal for the 'fulfilment of man', for learning throughout life and to form the basis for the development of a more open system of flexible learning opportunities (Faure *et al.*, 1972), in practice the deteriorating economic conditions in Europe quickly diverted attention towards skills development. Lifelong learning became driven by concerns to improve employability and adaptability to the labour market in the face of high levels of unemployment (Field, 2000).

In the North, lifelong learning came to be associated with NFE outside the school system; i.e. as the concern of *post-(secondary) school* institutions. This enabled the common features of NFE, such as flexibility, open entry

and immediate relevance, to become highly attractive for learners and work organizations, as well as for governments. Such an institutional location of NFE was (and still is) in stark contrast to the prevailing situation in much of the South, where for large numbers of people – adults, youth and children – NFE provisions have ended up being the *only* opportunity to gain something of a *basic* education. This can help explain the pressures for formalization and equivalency, particularly on the side of young people, and the latter's frequent hijacking of adult education provisions for their own educational purpose. Thus NFE has tended to assume divergent roles in the (semi-) industrialized countries from those of poorer countries in the South, where it is subject to different social and political pressures.

Also significant in terms of comparison are the related findings showing that the range of NFE provisions, and participation in them, has been greater in industrialized than in poor countries, and that in both the North and the South NFE is more a reality for those who already have a successful experience in education (Carron and Carr-Hill, 1991; Field, 2000). To put it another way, the poor and the marginalized participate less in NFE and find that in actual fact NFE exacerbates their social exclusion. This is reported to be associated with lack of resources with which to participate, i.e. money and social capital, but also with a general sense of being excluded that is felt by such persons. Carron and Carr-Hill's conclusion here is significant: The traditional belief that NFE is playing a compensatory role for the poor who have been deprived of school education does not seem to be confirmed (even though this role is significant for many children and adults in the South). Moreover, while high levels of formal education generate a demand for NFE as well as for formal education, NFE is vulnerable in countries with low levels of socio-economic development (Carron and Carr-Hill, 1991: 12).

4. More recent shifts in the roles of NFE

The downturn in the world economy and increased control of the Bretton Woods institutions over economies, along with the macro socio-economic policies in force in many countries in the South, led to major reductions in government spending on social services and other development-support services, the curtailing of innovative approaches to social development, and an increase in poverty and marginality for large sections of the population. In its wake came new ways of thinking about the delivery of social (including education) services, the role of the state *vis-à-vis* the private sector and civil society, the importance of market mechanisms, privatization and decentralization. While in many cases the catalyst was provided by the structural adjustment programmes of the 1980s, the broader context was one of economic globalization and profound social, demographic and political changes affecting developments in the North as well as the South and that appear to make existing social policies unsustainable, inefficient or ineffective (Morales-Gomez, 1999).

The dominant value framework underlying policy reform has become neo-liberalism, emphasizing a reliance on the market's capacity to help improve performance in public investment and in the provision of social services. Social development and poverty reduction have come to be seen as by-products of economic growth, relying on the most efficient use of available resources. In this context, the availability of resources appears to matter more than their distribution and the accompanying inequalities. Implicit in the frame is that the poor and the marginal take their own steps to mobilize their individual and community capacities to achieve greater equity (Morales-Gomez, 1999).

Morales-Gomez posits that the other side of this coin is that new assumptions about the improvement of access, quality and relevance of social services like education are often not justified. Poverty leads to

significantly-reduced participation in education and an increasing pressure on NFE to serve as a substitute for non-accessible formal education. In a climate that promotes individual initiative and advantage, little is done with regard to capacity-building for the poor, while efforts at achieving greater equity and social cohesion are often blocked by dominant elites. In social policy reform, technical aspects dominate the debates, such as the most convenient mix of different parties in the delivery of services. In this context, no alternative options are recognized other than what has been proven or is based on hard scientific evidence (Morales-Gomez, 1999: 173-186).

Since the late 1980s, the review of priorities in education generally led to a revaluation of the importance of formal basic education and its core curriculum of basic competencies. NFE came to be seen as a less viable part in socio-economic development strategies (La Belle, 2000). It was also assumed that much of NFE, such as work-related training, could be picked up by the private sector. While para-formal forms of education flourished, especially in general continuing and adult education and in technical and vocational training, there was also evidence of a progressive tendency for the formal education system to absorb innovations from the NFE sector as part of the standard curriculum. It should be noted that this has been observed in particular with regard to the adoption of flexible modes of delivery (such as through open and distance learning) and teaching methods (Ahmed, 1983; Carron and Carr-Hill, 1991) (see also *Chapter 5*). However, the absorption of NFE-type innovations associated with curricular relevance appears to have lost popularity during the 1980s (Hoppers and Komba, 1995).

There have been efforts to increase the formal articulation between para-formal forms of adult basic education or vocational training on the one hand and parts of the formal system on the other, such as in several countries of Eastern and Southern Africa. But, as it happened, such articulation was debated as a policy issue at a time when employment prospects for graduates were rapidly diminishing. Within a much tighter labour market, young

people with a little education of poor quality and few technical skills were increasingly relegated to casual work activities as well as to the lower levels of the urban informal sector, with no prospects for advancement (Turnham, Salomé and Schwarz, 1990; Gallart, 1999: 6).

In this context, the very integration of vocational NFE into the formal system, with the accompanying tendency for programmes to become more formalized, became an additional constraint to finding gainful work. Furthermore, under conditions of increased poverty and deprivation, previously highly effective forms of social capital, such as personal and family networks, rapidly lost their significance in the lives of young people – especially women – from poor backgrounds (Hoppers, 2002).

A general consequence of the new socio-economic conditions in the South has been the emergence of more minimalist approaches to NFE. While the general relevance of embedding youth development work within the wider frames of the informal sector, entrepreneurship promotion or rural development programmes has been recognized, there has also been a clear shift in focus from development to livelihood, and from equal opportunities to survival. This is exemplified in some more recent initiatives to combine functional literacy with life or vocational skills for out-of-school and unemployed youth. Here, literacy is seen as the main gateway to poverty alleviation and as a means to promote gender equality and empower the poor and their communities. While in some cases this learning is directly articulated with appropriate levels of formal basic education, in other instances this is intentionally avoided for fear of the restrictive influences of formalization (Lauglo, 2001). It has, however, been argued that this can be self-defeating, as the non-recognition of a growing relationship between social background and (rapidly-disappearing) opportunities for productive work will hamper the success of such vocationally-oriented literacy programmes (Druine and Wildemeersch, 2000: 396).

5. New discourses in basic education development

A characteristic of present debates on basic education reform is that different parties are often influenced by rather divergent viewpoints as regards principles that should direct such reform. Thus, pragmatic arguments for low-cost skills development programmes for young people aimed at improving the quality of life are expressed alongside arguments for affirmative action programmes for disadvantaged youngsters aiming at full equivalence in achieving educational outcomes. Two concepts that support a more maximalist agenda will be reviewed here: social inclusion in education (which reaches beyond education for the handicapped to full and equitable participation in education by all social groups) and human rights in education.

A term that has increasingly been used to explain the purpose of NFE interventions is 'social inclusion'. Originating from social policy discourses in the North, it is often applied rather loosely, referring to processes whereby the poor, the marginalized, rural girls, unemployed youth or other categories of disadvantaged people gain access to learning or are enabled to participate in the labour market. The emphasis tends to be on social integration, which is thought to be achieved by the very act of participation, regardless of the massive inequalities of gender and socio-economic background (or ethnicity) in terms of conditions and rewards (Levitas, 1998). Thus, as regards basic education, social inclusion is often assumed when young people are enrolled in some form or other of basic learning, whether this is in a formal school, a distance education course or a literacy class.

The exclusion-inclusion discourse, however, has other strands that feed into social development agendas that consider equity and social justice. They go beyond accepting the realities as they are to looking towards forms of social organization that maximize the involvement of all citizens. In this discourse, social exclusion has been defined as "the dynamic process of

being shut out, fully or partially, from any of the social, economic, political and cultural systems which determine the social integration of a person in society" (Walker, in Barton, 2000: 59). Kabeer makes a helpful distinction between two categories of disadvantages: economic disadvantages, associated with unequal distributional systems of society; and cultural disadvantages, associated with valuation and identity. Often economic disadvantages are related to cultural disadvantages, particularly with regard to specific social groups such as those defined by gender, ethnicity or caste. Action and policy responses, therefore, would need to be of two types: economic, by working towards redistribution; and cultural, by working towards recognition of diversity (Kabeer, 2000: 84).

Of particular relevance here is the link made between social exclusion and institutional rules (see discussion earlier in the chapter). According to Kabeer, if a person is at a disadvantage this results in social exclusion, where the various institutional mechanisms through which resources are allocated and value is assigned operate in such way as to systematically deny particular groups of people the resources or recognition that would allow them to participate fully in society. Such mechanisms may include institutional or systemic biases of beliefs or values, and unnecessary restriction of access to opportunities (Kabeer, 2000: 88-89).

Education systems in general, and NFE institutions in particular, feature many mechanisms by which exclusion occurs, even though this is not officially intended. Among other reasons, it may be the result of what are referred to as 'unruly practices' (Kabeer, 2000), such as teacher behaviour, or of traditions of institutional differentiation, such as the formal/non-formal divide, that have not sufficiently been interrogated in terms of their unequal access and impact on young people's lives. The result is that while some *inclusion* occurs because of additional NFE opportunities, *exclusion* often follows as a result of the unequal terms under which participation

takes place and which, in turn, may perpetuate the disadvantage (Kabeer, 2000: 88; Sayed, 2002: 4)

The extended provision of basic education in the South, including its non-formal types, is also increasingly driven by human rights concerns. The education rights issue is seen as part of a much wider frame in which democracy, human rights and sustainable human development are recognized as being interdependent and mutually reinforcing, as a basis not only for an integrated approach to development but also for bringing back human beings, individually and collectively, as the centre points of development goals (Odora Hoppers, 2004: 2).

Not only does this perspective provide a moral (and in many countries also a constitutional) imperative to governments, along with non-government partners and funding agencies, for giving high priority to education, it also leads to robust debates over what such a right actually entails and how it is to be implemented. Even while governments may be genuinely constrained in exercising their obligation towards ensuring that each person has a right to education, a rights-based approach founded on various rights instruments, such as the Universal Declaration of Human Rights and the Convention on the Rights of the Child, can inform the articulation of norms and standards for basic education provision, and in particular help define actual entitlements. In this regard, the rights perspective has also become one of the discourses contributing to an expanded understanding of inclusive education (Dyson, 1999).

Tomasevski's criteria for the institutional provision of school education are particularly helpful in understanding the relevant dimensions of what a right to education implies. These criteria are:

- *availability*; implying that schools should be established with competent educators and funded by the state;

- *accessibility*; implying that schooling should be compulsory and that there should be parental freedom to choose schools;
- *acceptability*; implying that education should be of a minimum standard. Institutions and programmes have to be available in sufficient numbers and should have sanitation facilities, trained teachers and teaching materials, amongst other such factors. Schools should also foster diversity;
- *adaptability*; implying that education should be sufficiently flexible to adapt to social changes and respond to the needs of learners from diverse social and cultural settings, including the children of refugees and children with disabilities (Tomasevski, 2001).

These criteria are especially important in the South, as they set minimum requirements for how education should be provided. Moreover, they invite further analysis of the interrelationships among the criteria, such as those between acceptability and adaptability on the one hand and availability and accessibility on the other. Together, they constitute a baseline that, if applied, would probably condemn large numbers of existing schools around the continent as inappropriate and unresponsive to children's needs or as a threat to their safety, security and identity. It would be of interest to also apply such criteria to non-formal types of education – at least to para-formal forms – as they tend to perform roles similar to those of formal school education.

However, apart from the establishment of a baseline for provisions, there is also an agenda for *how much* and *what substance* of initial education for children is comprised in this human right. Moreover, the extent to which such rights can be legitimately pursued through other types of basic education (such as para-formal education) that do not follow the conventional organizational format or that do not even have an adjusted curriculum can be questioned. Thus far, there are no core parameters regarding minimum requirements to qualify as initial *basic* education and

thus no general reference points by which to define a basic entitlement within national systems of education.

This is where the interface between the right to education and wider economic, social and cultural rights takes on greater significance. From a rights perspective, one may posit that equality of opportunity to compete for positions of value in the wider society requires a meaningful set of equivalent learning outcomes that every child or young person is entitled to. With the current socio-historical conditions in the South, the right of *access* to basic education *per se* is unlikely to significantly facilitate clearing the way towards changing life conditions and emancipation. Thus, without a right to a basic level of learning *attainment* (and thus to the further opportunities that this would open up), granting the right to education would not be sufficient to allow full participation in economic, social and political life. While the definition of 'basic level' may vary from country to country, it could be acknowledged that with increasing globalization the socio-political and economic structures of countries are converging to such an extent that common parameters for basic attainment are becoming justifiable, if not essential, to protect human rights.

From a human rights perspective, a case can also be made that such a right to equivalent learning attainments requires giving attention to the organization and processes of learning and their differential impacts on different social groups (i.e. the inner workings of institutional rules – see above). It may also mean that in selected situations *compensatory effort* is made to assist social groups to overcome disadvantages – e.g. to help girls overcome social subjugation and patriarchy –, and that, in general, poor and marginalized children are given *extra help and resources* to overcome structural social and economic deprivation. Kabeer makes a distinction here between '*affirmative* remedies', that is to say those that aim at correcting the inequitable outcomes of social arrangements without disturbing the underlying institutional framework that gave rise to them, and

'*transformative* remedies', aiming to correct inequity by restructuring the underlying framework (Kabeer, 2000: 95).

Thus, the pursuance of basic levels of attainment across all provisions of basic education would constitute the centre-piece of a holistic and differentiated response of the system to, and inform the setting of minimum standards for, provision and achievement. By implication, it would also serve as a key vehicle through which selected and appropriate non-conventional provisions could be integrated into a basic education system.

6. Struggling with basic education in the wake of Jomtien, Hamburg and Dakar

Against the backdrop of macro-economic and social policy shifts and contested visions of the role of education in development, it is not surprising that the basic education conferences at Jomtien (1990) and more recently in Dakar (2000), as well as the Adult Education Conference in Hamburg (1997) produced mixed messages regarding preferred policy directions for basic education. Reviewing the pronouncements, one is confronted with much ambivalence and lofty statements of principle, which allow for widely divergent policy goals and strategies for implementation. A key problem appears to have arisen in the discrepancies between the complex needs of education systems for change and agencies' selection of single-focused policy prescriptions.

The Jomtien conference was unequivocal in its acknowledgement of the centrality of formal primary education. In the World Declaration, primary education was considered to be synonymous with primary schooling and given the responsibility of meeting the basic learning needs of all children. Supplementary alternative programmes could help meet the learning needs of children with limited or no access to formal schooling, "provided they share the same standards of learning applied to schools and

are adequately supported" (Inter-Agency Commission, WCEFA, 1990: 46). The nature of the linkages between alternatives and the school system was not dwelt upon. Thus, alternatives for primary schooling were acceptable, but did not have the same value, even if they met the required conditions. At the same time, Article 2 of the Declaration was adamant in proclaiming that "what is needed is an *expanded vision* that surpasses present resource levels, *institutional structures*, curricula, and conventional delivery systems while building on the best in current practices" (*emphasis mine*) (Inter-Agency Commission, WCEFA, 1990: 46).

Significantly, the Jomtien documents made a distinction between supplementary programmes for children at the primary education level and those for youth and adults. While the former were implicitly presented as emergency provisions that filled a gap that primary schooling did not cover, the latter were recognized as a separate education category offering various "delivery systems for meeting 'diverse' learning needs" (Inter-Agency Commission, WCEFA, 1990: 46). This seemed to indicate that NFE only had a legitimate status in the area of *post-primary* education and in *adult* education, i.e. the supplementary category. Thus, it appears that in defining the expanded vision, any critical understanding of malfunctions in the primary system was overshadowed by negotiated compromises over its representation. In the same vein, there was no reference to significant NFE experiences or innovations that had something to say about meeting specific types of learning needs more effectively (Hoppers, 2000). In this regard, by endorsing the established and inherited educational hierarchy, Jomtien did not break new ground.

The notion of links between formal and non-formal education received attention in the discussions at the Adult Education Conference in Hamburg. It was recognized that different sub-systems of learning need stronger links with one another. This is to be achieved through ladders and bridges from initial formal education to continuing education and between formal and

non-formal education (UNESCO, 1997). The attention given to lifelong learning was seen as an integrative principle that could help eliminate existing barriers and give concrete meaning to issues of complementarity and continuity in education from the perspective of the individual and society (UNESCO, 1997). Conceptually, Hamburg therefore marked progress towards the integration of systems, placing different dimensions of learning together within a new frame, such as diversification of delivery, flexibility of provision, diversity of languages and cultures, learner-centred strategies, and use of traditional media and of modern technologies (Hoppers, 2000).

The Dakar Framework of Action was more forthcoming in emphasizing access to a complete cycle of basic education as a human right. While it allowed this type of education to be provided in schools or alternative programmes, it left the details of the substance of this basic education, and how much of it would constitute the fulfilment of that right, to be decided by individual countries. To be sure, the Framework also recommended the removal of barriers – such as eliminating all direct and indirect costs to children and their families – and a commitment to developing flexible responses to the needs of marginalized and excluded groups – both in terms of provision and of content (World Education Forum, 2000*b*: 5-6). However, by not committing itself to core parameters regarding what minimally constitutes *basic* education, the Dakar Conference missed an opportunity to set general reference points for the definition of a basic entitlement within and across national systems of education. This also left intact the assumed institutional divide between formal and para-formal forms of initial basic education.

As they stood, the frameworks of the conferences were mocked for the very slow progress in their application. The translation by donors and governments of Education for All into Universal Primary Education meant that all targets were ultimately related to the expansion of access to primary schooling. Throughout the 1990s, progress in critical regions was

lagging behind. Sub-Saharan Africa (SSA), along with the Arab states and North Africa, were major areas where gross enrolment rates showed little change. "The ratio of ... 75 per cent in SSA reflects continuing difficulties in responding to potential demand for education which is driven by rapid population growth" (World Education Forum, 2000*a*: 28-30). While in all regions the number of out-of-school children has been declining, in SSA it has continued to rise, reaching 42 million in 1998 (World Education Forum, 2000*a*: 20).

By 2001, the greatest concentration of educational deprivation remained in SSA and South Asia. In the former, only a handful of small countries both reached gross enrolment ratios of 100 per cent and had net ratios above 90 per cent. While general improvements have been noted across the world, net enrolments in one fifth of all countries providing data declined during the 1990s – especially in Eastern Europe, Central Asia and SSA. In total, by 2001 there were still 103 million children out of school, as against 106 million in 1998 (UNESCO, 2004). However, the numbers of children registered but not attending, as well as those who drop out before being recorded as such, also need to be considered. Furthermore, in many countries, as efforts to increase efficiency succeed, large numbers of over-age learners are also pushed out of the system.

In the midst of the general concern with progress towards achieving school enrolment targets, the actual contribution of non-formal types of basic education towards the achievement of the goals of initial education has received very little attention. The bias towards schooling has dramatically reduced the funding available for other forms of basic education. Non-school forms of basic education suffered as a result of the EFA agenda and were increasingly left for the civil society to provide (Torres, 2003; Lind, 2002). Work-related vocational training was considered best left to the market. As this market tended to be rather biased towards commercial (ICT) and administrative training, skills development, which is essential

for industrial work has tended to suffer. Governments, faced with reduced budgets as well as a drastically restricted role in shaping socio-economic development, were confronted with large disjunctions in the provision of opportunities for participation across different sections of the population. Poverty reduction programmes and social safety nets could not resolve this situation. Increased poverty has become the single biggest constraining factor in educational development.

Presently, as regards basic education, issues of quality – in terms of inputs, processes and learning outcomes – have begun to attract attention. As a result, more understanding can be gained as to how different institutional environments impact on children's learning. This is of particular importance to NFE, as there are still major gaps in understanding and measuring the level of quality that is effectively achieved in non-formal programmes. However, while there is little doubt that NFE programmes in general score badly on the basis of conventional quality criteria related to inputs, where data are available they tend to do better based on the criteria regarding process and achievement. Unfortunately, there is still insufficient attention given to the manner in which school processes interact with the social, cultural and economic environments and the knowledge, value systems and perceptions that learners contribute. Thus, there is still little insight into the relevance of what is learned and how this impacts on young people's lives. Both such interactions and their outcomes and impact need to be well understood in the context of different forms of basic education, as this is imperative from a social inclusion perspective as well as from a rights perspective.

Chapter 3
Current manifestations of non-formal education

This chapter will present a small proportion of the current examples of NFE that respond to the learning needs of children and young people from different regions and illuminate the diversity of types and forms that exist. The main criteria used here for their selection are that the examples be substantive in their coverage and scope, that they represent different models for systemic approaches to basic education (i.e. have systemic potential) and that they reflect different ways of thinking about education, its purposes and scope, and its social construction. The examples include both older and more recent programmes, since it is considered just as important to highlight initiatives that have demonstrated their value over a longer period of time as those that represent new ventures.

The types of NFE from among which the examples are chosen include: para-formal education, popular education, vocational and professional training, literacy with skills development, and supplementary programmes integrating formal and non-formal components. All examples are located in the South.

1.   Para-formal forms of basic education

Para-formal forms of basic education were defined as those programmes of formal education that are implemented by non-formal means. It is thus assumed here that the basic substance of the curriculum largely remains the same and that it prepares learners either for the same or for an equivalent certification. The non-formal dimension of these programmes tends to relate to other, usually more flexible, forms of learning organization, approaches

to teacher recruitment and training, and resource mobilization, different from those in the formal system.

The first example is a sub-system of *community schools* in Mali (see *Box 1*).

Box 1.   The village schools of SCF/USA in Mali

- By the end of the 1980s, access to formal education in Mali was stagnant and the government's capacity to provide basic schooling was severely constrained due to persistent resource allocation favouring secondary and higher education. Thus enrolments remained very low (22 per cent in 1989/1990). Due to a slow pace of expansion, different forms of community initiative had begun to emerge. Individuals, communities and associations had started private schools, *écoles de base* and village schools of various types. In this context, an experiment was undertaken that represented a first attempt to systematically help villages that were focused on the objective of establishing primary schools.
- A model was developed for providing education through simple interventions. It aimed at combining lower costs, lower teacher qualifications and lower material requirements in an environment of higher community, teacher and student commitment. A partnership between SCF, USAID, government and the communities would allow community initiative and national policy-making to work in tandem.
- Thus, the model was characterized by the following factors: community construction of the schools; a supply of basic materials by SCF, together with initial training and continued supervision of locally-recruited teachers paid for by the community; a small monthly tuition fee; use of a modified three-year curriculum with instruction in the local language, an initial emphasis on literacy and numeracy, knowledge of village life, health and the work environment, and introduction of French in year 3; and a village-based school management committee to run schools. The programme is also unique in that the schools are part of an integrated rural development strategy in which adult education was introduced as an essential component of community empowerment.

- Major achievements have been that school costs have remained low while promotion rates were higher than in public schools. Schools have demonstrated that the demand for education was high and that they were able to enrol boys and girls in complete parity. Relationships between schools and the community are reported to have changed as committees deal with enrolments, attendance, school timetables and monitoring of teaching and learning conditions. Flexible calendars and timetables, as well as adaptation of the curriculum to the local environment, are highly appreciated by the communities, with quality being supervised by the education authorities. The success of the schools has been that they were able to provide instruction using teachers with very little formal education, which was particularly facilitated by the switch to the local language. By 1998, the overall number of village schools was 1,423, with an enrolment that amounted to approximately 10 per cent of total enrolment in Mali.
- USAID facilitated the formal recognition of alternative schools on the basis of a newly constituted legal framework. Although as a consequence equivalency has in principle been established, there are still major outstanding issues, such as the status and salaries of untrained teachers, the difficulties of ensuring access to upper grades so as to complete the primary cycle, and the existence of inequities among the different school types. There is also the important question of how greater state involvement can be harmonized with continued community control.

Sources: DeStefano, 1995; Velis, 1994; Cissé, Diarra, Marchand and Traoré, 1999.

Community schools are defined as schools established, run and largely supported by local communities, whether they are geographic communities (villages or urban townships), religious groups or non-profit educational trusts (Hoppers, 2005*a*). In many countries, there are long traditions of community schools (Bray and Lillis, 1988). In Africa, community support for education was particularly spurred on in the first decades post-independence through social mobilization instigated by ruling parties as a means to speed up the delivery of social services or to integrate the schools and their communities socially and economically (for example see Buchert,

1994). More recent social policy reform, implemented in many countries as a corollary of externally imposed structural adjustment programmes, often necessitated communities to become extensively involved in running and financing schools (Morales-Gomez, 1999). This produced a new generation of community schools, generally located in marginal rural or urban areas of poorer countries, ranging from Senegal through Mali, Burkina Faso, Togo and Chad, to Ethiopia, Kenya, Tanzania, Malawi, Zambia and Mozambique (Marchand, 2000).

In Latin America, as in other parts of the world, there are many compensatory education programmes. Here, unlike in the North, these are generally not started by the education authorities, but rather are born in the margins of the education system, instigated by civil society organizations or through local activism. It has been noted that this is partly because the public system tends to assume that 'one size fits all', with ethnic minorities being required to assimilate a standard Spanish-medium education. This is partly because the system has not adequately reached marginal rural areas. This gap is being filled by compensatory programmes, of which CONAFE in Mexico has been one of the more successful (Martin, 2004).

CONAFE is an NGO established in 1973 that has since worked to create alternative structures for primary education serving dispersed populations in rural areas. Significantly, it offers a national coverage and operates under a legal agreement with the national education authorities. Moreover, recognizing a constitutional right to education for everyone, the schools prepare for the same national certificates as other schools (CONAFE documentation, 2001). Specific information is provided in *Box 2*.

Box 2.   The CONAFE community courses in Mexico

- Founded in 1973, *Cursos Communitarios* (community courses, or CCs) is a national, governmental programme offering primary education to small, isolated, rural communities with less than 500 inhabitants. The programme was initiated on an experimental basis with 300 young people in two states   of the country. After three decades, CC constituted a sub-system within the Public Education Ministry, operating in 44,778 rural communities and serving nearly 250,000 pre-school and school children. A post-primary programme is also offered, serving people of all ages from rural and indigenous communities who have finished elementary education and wish to continue studying. These high school or technical education programmes are certified by the *Instituto Nacional para la Educación de los Adultos* (INEA) or the Ministry of Public Education.

- CC schools offer the national curriculum and official certification upon completion of primary education. The six years of primary education are organized in three levels. Young boys and girls between 14 and 24 years of age, selected by their own communities, assume the teaching role and make the running of this programme possible. These *Instructores Communitarios* (community instructors) must have completed at least the lower secondary level and receive special training prior to and throughout the two years that they stay and teach in the community. In exchange for their social service, they receive a small monthly subsidy, food and lodgings from the families concerned, and the promise of a five-year study scholarship with which they can complete their secondary studies or pursue a university career.

- In collaboration with the National Polytechnic Institute, the primary school curriculum was adjusted in a manner that reflected the local relevance of the content and recognized local cultural knowledge. The pedagogical model is focused on dialogue and discovery and based on the principle that all children, rural and urban, apply the same processes of knowledge construction, even while their material and cultural worlds may differ. It recognizes that current inequalities engender a need to provide differentiated attention to learners who do not enjoy similar benefits of development, starting from the recognition of their cultural, economic and social situation.

Source: Torres, 2001: 15-16; CONAFE documentation, 2001.

Finally, in the set of examples of para-formal education, we offer a major initiative that was recently started by the Government of Tanzania to pilot an NFE strategy for out-of-school children.

Box 3.   The COBET Programme of the Ministry of Education and Culture in Tanzania

- In 2002, as a component of the Primary Education Development Plan (PEDP), the Tanzanian Ministry of Education and Culture initiated a nation-wide NFE programme aimed at the nearly 3 million children estimated to be out of school, called Complementary Basic Education and Training (COBET). The programme was set up initially as a pilot to develop an effective fast-track strategy for offering formal basic education to the 11-13 age group. In order to speed up the achievement of seven years of universal and compulsory schooling, the Ministry established a policy to enrol all seven to ten year olds in Standard 1, provide a non-formal version of the seven-year primary curriculum to all seven to ten year olds, and continue to provide NFE to those who had missed out on secondary education.

- The pilot started with 50 COBET centres in five learning districts involving 1,600 children, almost half of whom were children in vulnerable circumstances, with a special focus on girls. The principle characteristics of the centres were to be their proximity to children's homes; reduced direct costs (no fees, uniforms or materials); a shorter time-frame (three years instead of seven); a responsive curriculum with emphasis on life skills and HIV/AIDS education; a child-friendly and -centred pedagogy; a safe and secure school environment (including no physical punishment); a high level of community involvement; and maximum time on task.

- The Ministry had arranged for support to be provided by mainstream professional institutions, such as the Tanzania Institute of Education (TIE curriculum development), District Management Teams and COBET Centre Committees (production of teaching/learning materials). Monitoring was not only to be carried out by the Centre Committees and the local communities, but also by the Adult and Primary Education Departments, the TIE and UNICEF. Much effort was also put into the training of centre facilitators and management committees.

- The Ministry is highly conscious of the fact that the gradual upscaling of the programme will constitute its biggest challenge in the near future. The strategy is that the centres are to gradually become satellites of existing primary schools. Learners will register in the main schools and become part of the wider school communities while continuing to learn at the centres. At the same time, the facilitators will be replaced by formal primary school teachers, generating a higher teacher-to-learner ratio as well as a less favourable textbook-to-learner ratio. The Ministry of Education and Culture (MOEC) argues that in order to rapidly expand the programme, concessions have to be made. But it hopes that with the continuation of close supervision, teacher development, child-friendly pedagogy and community involvement, the quality and retention levels can all be maintained.

Source: Bhalalusesa, 2003.

2.   'Popular education' forms of basic education

As discussed above, these forms of NFE combine an attention to literacy, basic skills and socially-relevant knowledge with the stimulation of critical awareness of the inequities and harmful practices in the social, cultural, economic and physical environment. The latter is linked to forms of social action in collaboration with other organizations. Popular education can be distinguished from para-formal forms in that its aim is not merely to deliver the same formal curriculum in a more relevant manner, but also to reconstruct the very foundations of this curriculum and its associated pedagogy, with an emphasis on guided experiential learning within the context of shared responsibility for learning and development (Dovey, n.d.: 2). Moreover, it tends to actively defy the very distinction of formal and non-formal education. It should be acknowledged that it cannot always be clear as to where the boundaries should be drawn, as the nature and extent of the shared responsibility is not always clear. Some examples of efforts to construct alternative models to provide quality education are given here.

Box 4.   ***Fe y Alegría*** **(Faith and Joy), movement for popular**
education in Latin America

- *Fe y Alegría* is an NGO that provides formal and non-formal education
  at different levels in 12 countries in Latin America. Founded in 1955 as a
  project to educate 100 poor children in the room of a construction worker,
  it began to expand to other countries in 1964. By 1992 it had expanded
  to 12 countries, reaching 512,796 students in 509 centres. *Fe y Alegría*
  defines itself as a movement of integral popular education. Its prime
  mission is to provide quality education to the poor in marginal areas of
  the countries and it aims explicitly to operate as a separate system within
  the confines of the formal education system. Its basic operating principle
  is to create partnerships between the organization, the state and the local
  community. While the Ministry of Education typically pays for the
  salaries of the teachers, the communities participate in the construction
  and maintenance of the schools, while *Fe y Alegría* trains and supervizes
  the teachers, manages the schools and co-ordinates activities so that the
  schools operate as centres for community development. In this way, the
  organization covers a small percentage of all children enrolled in schools
  in each country.
- The NGO has national as well as regional directorates. The latter assist
  schools in designing specific plans and linking these to the broad vision and
  guidelines established by the national directorate. Schools have autonomy
  to interpret the guidelines and administer staff and budgets. While the
  movement was founded by the Jesuits, other religious organizations
  participate and most teachers are not ordained personnel. The national
  'chapters' are registered as private non-profit organizations that operate
  under agreements with the Ministry of Education.
- In their curricula, the schools place content within the local context,
  acknowledging elements of oppression as well as resistance by popular
  groups. In such situations, parents can participate in the delivery of
  education. The curricula combine several key elements: the rooting of the
  learning processes and contents in reality and in life; an active, critical and
  creative pedagogy; education in productive work; education in Christian
  values; confrontation with life problems; education in participation; a basis

for lifelong learning; and a commitment to developing a 'new model of man and society'. Schools are centres in the locality and joint activities and celebrations are common. They also become centres of community development through participating in community activities and supporting grassroots organizations. In the process, democratic leadership and joint participation in social change is promoted.

- Although by 1992 no systematic evaluation was available, there were indications that results tend to surpass those in the public part of the formal system, that demand for places is high, and that per-pupil costs are lower than in the public system.

Source: Reimers, 1997 (data from 1992).

In India, one of the greatest challenges for basic education is seen to be the development and nurturing of cultural diversity on the one hand, and the development of values of scientific temperament, national integration, equality, human dignity, universal brotherhood and an urge for excellence on the other. Indian education must help to overcome the barriers of caste, creed, gender, religion, language and region (Passi, 1997). This is even more of a challenge as the current system is what has remained of the grand colonial designs and is thus often regarded as counterproductive, leaving a curriculum that is non-negotiable and 'given' and thus represents 'received knowledge' (Passi, 1997; Rampal, 1997). In this context, NFE has become an important source for innovations, sometimes explicitly focused on the re-thinking of education as a people's development process, and building further on the features of (Gandhian) basic education. One innovative strategy responsible for improving quality through system innovation has become a model designed and introduced by the Indian Institute of Education (IIE) in Pune, in the Indian state of Maharashtra.

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Box 5. **The model of the Indian Institute of Education, India**

• The IIE in Pune is a reputed organization committed to the cause of basic education through the non-formal mode. The IIE model aims at promoting elementary education through a novel action-research based strategy. It incorporates a concern for the needs of learners in their environmental contexts – identified through community surveys and situational analyses – as well as a concern for equivalence with the requirements of a full-time primary education curriculum. At the operational level, the programme has three phases: planning and preparation of the curriculum and teacher training; establishing and strengthening the village education committees; and networking of the educational programmes with other community programmes. This programme was organized in five diverse agro-climatic areas.

• The curriculum is designed through the joint efforts of professionals, teachers and the community. The latter also shares the decentralized model of management of the programme. This approach enhances the level of relevance, empowers the teachers and the community, and induces flexibility in the centres. An interesting feature of the programme is the cumulative external evaluation system. This system is managed by organizing six-monthly children's fairs. The environment of the fairs is informal and friendly. They are organized in such a way that five or six villages are covered from the logistical point of view. Children go to the fairs singing educational and social songs. Half of the day is spent organizing competitions of a recreational nature, demonstrating skills such as story-telling, problem-solving, puzzles, etc. The second half is devoted to the assessment of achievement in language, mathematics and general knowledge through innovation, co-operation and working in small groups. Despite this group-work approach, each child is also assessed individually. External teachers participate as evaluators. Other than the usual evaluation of NFE outcomes, this approach emphasizes the assessment of social awareness, creativity and aesthetic sensitivity.

• Professionals have assisted in the development of multimedia, multidimensional, multilevel and multipurpose materials for students of various backgrounds. Decentralized management involving officials and

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non-officials has contributed to the success of this strategy. This type of educational initiative by the community, of the community and for the community can meet the challenge of improving basic education. One may favour the ideas of centralizing the curriculum and its management for the purpose of upgrading the level of the syllabus and the quality of education. In addition, co-ordinating inputs are desirable if central authorities are to learn to differentiate between enabling stimulants and disabling interferences.

Source: Passi, 1997.

3. Vocational and professional forms of NFE

In this category, we look at current examples of training initiatives outside the formal system of vocational training and also outside the large category of programmes serving as para-formal shadow systems to the formal training institutions. They represent new initiatives of a non-formal kind, taken by or in collaboration with government ministries, aimed at developing new institutional frames for skills development among young people. Objectives tend to be partly associated with national economic development, notably combatting unemployment and building national human resource capacity to help improve a country's competitiveness in the global market. They are partly associated with social development goals, such as improving the quality of life and removing structural bottlenecks so as to reduce inherited inequities affecting the life chances of women, marginalized youth and children in remote rural communities. Significantly, such initiatives become directly related to wider government initiatives to promulgate national training policies and put in place a national institutional infrastructure for financing and for evaluation and accreditation of qualifications.

Box 6.   The National Foundation for Community Skills Development Centres in Namibia

• The National Foundation for Community Skills Development was initiated by the Ministry of Higher Education, Training and Employment Creation after its establishment in 1995. Its goal is to enable communities to obtain financial, material and technical resources from government, the donor community and national sources for the establishment of Community Skills Development Centres (COSDECs) as community trusts. The COSDECs are community owned and managed, and they are tasked to identify community training needs in accordance with their economic potential and access resources through the Foundation. This Foundation is made up of members representing NGOs and government officials acting in their individual capacity. Through its Support Unit, the Foundation undertakes the identification and establishment of COSDECs and also assists with feasibility studies and other advisory services.

* The skills training is planned and implemented in collaboration with NGOs and employers, as well as professional training centres. It aims to be demand-driven and competency-based, combining technical skills with entrepreneurship, and skills for personal growth with those for community development and exploitation of economic opportunities. Training is also meant to be hands-on and to link to the establishment of micro-enterprises. For training and sustainability reasons, efforts are made to establish incubation units at each centre.

* Thus far, seven centres have been established in rural towns across the country. Enrolments started in 1998 with 45 trainees, increasing to 232 one year later. Namibia has been in the process of establishing a Namibia Qualifications Authority that will define standards in all sectors and establish policy and procedures for evaluation and accreditation of qualifications at all levels.

Source: Angula, 2001; Namibia Ministry of Higher Education, Training and Employment Creation website (www.op.gov.na), 2004.

Box 7.   Upgrading training in the *Artisanat* (informal sector) in Burkina Faso

*   In many of the poorer countries of the South, a major source of skills development has been the various forms of apprenticeship in the informal sector of the economy. In this country, as in many others, there are longstanding traditions of young people in both urban and rural areas being attached by their families to a craftsman/woman to learn a trade. This learning can begin at a young age and last for many years, until the trainee becomes a master in his/her own right. In the meantime, the master to whom he/she is attached serves not only as a trainer, but also as a personal mentor looking after the welfare of the apprentice and aiding his/her introduction into the social and economic world.

*   In Burkina Faso, with its continued poverty and low enrolment in formal education, the *artisanat* has increasingly come to be recognized as a major source of economic growth and of training and employment for young people. Its high level of organization through trade associations has enabled initiatives to be taken for improvement of the skills base of the craftsman/woman, product development, the level of technology, and input/output marketing. At the forefront of such work is the *Bureaux des artisans*, located in the different towns, and their umbrella organization, *Fondation des bureaux des artisans*, established with the help of GTZ (*Deutsche Gesellschaft für Technische Zusammenarbeit*), Germany. This foundation assists its members in initiating training programmes for craftsmen and craftswomen and in enterprise development projects. It also negotiates with government (through the Ministry of Commerce, Industry and *Artisanat*) for technical and financial support, but also for national recognition of artisanal apprenticeship training.

*   Significant new initiatives have been collaboration with externally supported non-formal centres for artisanal development in developing dual training and *alternance* programmes for youngsters, in which training in a workshop is complemented by advanced practical and theoretical training in a centre for artisanal development. Other initiatives include the establishment by government of a tripartite Support Fund for Professional Training and Apprenticeship (*Fonds d'appui à la formation*

professionnelle et à l'apprentissage) and a government intention to move towards establishing a national framework for certification and validation of training across different levels of the formal/non-formal divide of provisions.

Source: Ouattara and Mivelaz, 2001; documentation of the Government of Burkina Faso 2004.

4.   Literacy with skills development training

In adult education, it has been very common over the years for literacy programmes to combine literacy training with some form of occupational training and income-generation activities. In recent years, in the context of new work on adult education undertaken by the Africa Region of the World Bank, efforts have been made to investigate the relationships between literacy training and livelihood skills development (livelihood in its traditional sense of making a living – Oxenham *et al*., 2002: 13) and the best ways to combine the two (sequentially or simultaneously). The study concluded that different kinds of staff are needed to teach literacy and vocational skills, and that livelihood skills training is a better vehicle for teaching literacy than the other way around (Oxenham *et al*., 2002: 13).

Although it is likely that many (older) youth will have been among the participants surveyed, the study does not analyze age-differentials. As a result, we do not know to what extent age, or more precisely the present life situation of participants, has had a bearing on the findings. Very little work has been done on strategies for combining adult basic or continuing education with vocational skills training, both of which have an explicit focus on youth. Here there are two examples of an integrated model that has proven its relevance over the years.

**Box 8.   SERVOL's Adolescent Development Programme
                in Trinidad and Tobago**

- SERVOL was created in 1970 as a private initiative to provide social support, skills development opportunities and work creation in the informal settlements of Port-of-Spain. In the midst of rapid social and economic changes, SERVOL built up a substantive community support programme targeting children under five years and teenagers between 16 and 19 who have performed poorly at school. The programme became focused around life centres as hubs for integrated education, combining pre-schools, offering vocational courses, and providing clinics and family farms as well as other education and training activities. The centres helped youths to combine training with forming relationships. All programmes are community-based, stress parental involvement and encourage personal growth as a way of overcoming low self-esteem. In the difficult conditions of scarce resources and the shortcomings of the formal system, SERVOL has secured recognition for community-based education and helped generate new alliances between NGOs, government and the private sector. In 1986, the government requested that SERVOL extend its programmes nationwide.

- The programmes for young people have been designed as an integrated youth development programme, focusing on personal development with social and cognitive skills, vocational skills training and employment creation. The first part is an Adolescent Development Programme, consisting of a fourteen-week course aimed at self-awareness, understanding personal emotions (often including group therapy and peer counselling) and developing positive attitudes. The course also includes literacy training and parenting. SERVOL helps indigent trainees to find weekend jobs to cover their fees. The next part is the Adolescent Skills Training Programme, in which trainees learn a trade in one of the centres for six to eight months. Here, literacy training is closely associated with the knowledge and competency required for the chosen trade. The key of the training programme is productive work, which supports skills development and generates income for SERVOL. Work in one's own production unit is followed by an apprenticeship with a firm for on-the-

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job training. Trainees sit national examinations leading to national trade certificates. It is estimated that of the 3,000 trainees who join the training programme each year, 5 per cent drop out, some 75 per cent find work and 10 per cent return to complete secondary school (the remaining 10 per cent is not explained, possibly due to unavailability of information). SERVOL has a credit arm to support enterprise development.

Source: Guttman, 1994.

Box 9.   Literacy and livelihood training: SEIGYM, Somaliland

- The Somaliland Education Initiative for Girls and Young Men (SEIGYM), supported by the Africa Educational Trust (AET) and launched in 1998, has adopted an unusual approach to literacy and livelihood development for its urban participants. It gives them vouchers that they can use to obtain the training they want. As all the vocational and technical training on offer requires some school qualification, non-literate participants can locate and pay for instruction in literacy and numeracy before moving on specifically to livelihood training. Over three years, 5,000 disadvantaged girls, young women and young ex-militia men have received literacy/numeracy and/or vocational skills training.
- The scheme made efforts to win the support of the local authorities and leadership and indeed works partially though them. Two main committees were formed with representatives from the Ministry of Education, women's groups, youth groups, local and international NGOs and United Nations agencies. Later, four more district committees were also established. The committees, working with tribal elders and community groups, select the disadvantaged girls and young men who will benefit from the vouchers.
- There were two systems. In the first system, students could receive a voucher that they could use to purchase the education or training of their choice. The voucher was redeemable only through the AET and only if the latter inspected the training provider and certified its standards. The AET also provided training courses for alternative trainers, craftsmen and women who wanted to run small training courses. The system was most

effective in the larger towns, where there were craftsmen and women who wanted to provide the training and where there were enough students with vouchers to make it worth their while to run a course – usually 10-15 students for one subject. The second system, run outside the larger urban areas, also offered vouchers. However, in addition it involved meetings and discussions with the students to find out how they wished to use them. Based on this information, the AET then recruited local trainers to provide the course, paying them against the value of the vouchers. This worked best in the smaller towns and was also important when the majority of students wanted literacy and numeracy training.

- To identify those who would qualify for the vouchers, the AET worked with each local committee to agree on the criteria by which to select the beneficiaries. Given the fractured nature of society, the AET worked with different committees representing distinct clan areas. Based on agreed procedures, the committees took responsibility for working with local groups, Imans and clan elders to select the candidates.

  The vouchers are redeemed through a system of supervision and accountability. Classes are monitored regularly and voucher payments are made against satisfactory performance. The latter is measured by attendance records, the teachers' lesson plans, comparison of students' work with the objectives and the lesson plans, and the actual ability of students to complete the exercises. Where classes are organized by women's, youth or community groups, payment is made to the management of the groups. For vocational courses, individual trainers train small groups and payment is made against delivery.

Source: Oxenham *et al*., 2002: 24-26.

5. Supplementary NFE programmes for vulnerable groups

As discussed above, the very fluid and shifting boundaries between what is formal and what is non-formal education can lead to many mixtures

of elements that belong to different domains. Particularly in a context where there is growing recognition of the needs and specific circumstances of children and young people, combined with a realization of the limitations of the institutions that are meant to serve them, concerned educationists are attracted to the possibilities of combining meaningful elements from both sides of the spectre. Such forms of 'co-operative' or 'dual' learning, whereby a NFE part supplements what is deficient or not feasible in the school environment, give new meaning to an 'integrated' approach to children's or youth development.

Box 10.   *Projeto Axé*, **Salvador-Bahia, Brazil**

- *Projeto Axé*, initiated in 1990, proposes an innovative, integral and quality education project that aims to enable vulnerable children and youth to take a critical stand *vis-à-vis* their society and to build their own personal and social projects. By 1999, 7,700 children and youths had benefited from the project, 30 per cent of whom were girls.
- All youth entering *Axé* must be committed to staying in or going back to school. Aware that many children and youth have had unsuccessful school experiences, *Axé* organized its own school, *Ilé Ori* School. As it did not want to establish a 'school for the disadvantaged', it convinced the municipal education authorities to organize public schools, mixing 50 per cent of *Axé* students and 50 per cent of adolescents and youth living in the area. *Axé* teams make sure that all learners stay in school, help them to study, meet with the families and monitor the schools that are trying to induce changes, so that they are better prepared to deal with all learners and not just *Axé* participants.
- *Axé*'s approach is not to prescribe solutions but rather to go in search of them, mediating between the excluded and the world of power and rights. Although working with the most vulnerable groups, it tries to break the cycle of giving and receiving, both in educational and in material terms. *Axé* aspires to form citizens that are committed to personal and social transformation. Learners are viewed as subjects of knowledge, deserving equal rights, each one unique and different in their own way.

- The youth can select from among a wide range of activities, which include health and recreation, arts and culture, and professional training. Arts and culture are not only seen as instruments of education, but are educative by themselves. The project offers music and fashion workshops and has three Afro-Brazilian music groups. In the field of income-generation, the project combines social needs with entrepreneurial management. Its production park is modern and well-equipped. Three educational enterprises are in operation: clothing design and fashion, recycled paper art and interior decoration. The students are trained in these professional skills and learn to view their work not only as production, but also as a means of citizenship building. They also learn about work organization and rights. Concern for the quality of products is considered a reflection of the level of self-esteem of those producing them.

Source: Torres, 2001: 12.

**Box 11.   Schools as centres for community care and support
                      for orphans and vulnerable children (MiET)
                      in South Africa, 2004**

- In South Africa, as part of the transformation of basic education following the demise of apartheid, partnerships between NGOs and provincial departments of education led to new conceptions of inter-school collaboration for educational and community development, especially in rural areas. Through a programme called the MultiMedia Rural Initiative (MMRI), co-ordinated by the Durban-based Media in Education Trust (MiET) with the Multichoice Africa Foundation (a private sector initiative), school clustering was promoted around mini teachers' centres as focal points for information exchange, using ICTs and satellite communication as well as conventional print-based and video technologies, and for teachers' collaborative action for educational improvement.
- Using a methodology of participatory rural appraisal, cluster co-ordinating committees in KwaZulu Natal and Eastern Cape provinces, with NGO support, also began to explore other rural education needs, leading to the

planning of additional initiatives related to adult education and dealing with the consequences of HIV/AIDS for rural children.

- Following this process and growing awareness in the school communities, not only of the consequences of HIV/AIDS for children and their families but also of the importance of the schools becoming directly involved in providing community support, a new initiative emerged linking school clusters and communities in a common project. Through school teachers and a formalized health promotion structure, orphans and other vulnerable children are identified and a care and support programme is planned and implemented. Each cluster school's efforts in the community are co-ordinated and monitored by a cluster childcare co-ordinator, who works with the cluster management team and liaises with state departments, community structures and other organizations. Oversight is provided by a district-level inter-sectoral steering committee. The childcare co-ordinator receives a small monthly stipend. This model of community care and support was piloted through MiET in seven school clusters during 2003/2004.

- The purpose of the strategy is to establish self-reliant school clusters and community structures which, with the help of NGO-led capacity building and support programmes, can look after orphans and other vulnerable children. At the same time, it aims to empower schools and educators to implement HIV/AIDS-related school policies and integrate HIV/AIDS education into the curriculum.

- The out-of-school component for orphans and vulnerable children includes conducting audits and awareness-raising, home-based care visits and initiating various recreational and peer support programmes as well as initiatives to enable children to better look after themselves and others. The latter focuses on care of one's self, one's siblings and sick relatives, as well as safety in the home, budgeting and paying accounts, nutrition and cooking, the handling of key documents, sexuality, life skills, sources and procedures for specialized support, and helping children to cope with grief. The cluster support team also attempts to facilitate the integration of orphans into their extended families or to find alternative caregivers.

- The in-school part focuses on helping educators to integrate HIV/AIDS into the curriculum, acquire skills related to counselling, identification and referral, and establish peer support groups. The team works with school boards on suitable HIV/AIDS-related policies for the schools and helps establish food gardens to support school lunches in order to improve effective school participation and food security.

Source: MiET documentation, 2004.

Chapter 4
Non-formal education
and the wider education system

The last two chapters (*4* and *5*) will reflect on the visions and roles discussed earlier and on how these are expressed in the various examples provided. While *Chapter 4* dwells on the current locations of forms of NFE *vis-à-vis* the wider education system, their institutional dynamics, relationships with the system and the roles of various actors in this field, the last chapter will focus on key challenges and policy and planning implications, as well as possible agendas for research and development work.

1.   A magnetic and dynamic relationship

The examples in *Chapter 3* demonstrate that the various types of NFE can have rather different relationships with the formal system. Some are happy to maintain a cordial but distant link, while others work very closely with their formal counterparts (see Mexico and Tanzania). In some programmes, notably para-formal substitutes for primary education, the organizers go to great lengths to achieve some form of alignment with the formal system within the context of a formal agreement with the state (Mali). Whatever distance from or type of link with the formal system is preferred, the latter will always remain in its own distinct field, as it were, and act as the main reference point by which to gauge the ups and downs of the NFE programme. Clearly there are also many reasons why formal systems require non-formal satellites within their orbit. It may well be that such 'magnetic' relationships are more significant in the domains of NFE for children and young people than in that of adult education. While the latter

tends to have its own legitimacy, in the former its *raison d'être* has to be continuously defined and defended in relation to the formal system.

It appears that communities or organizations running NFE for children and youth, even regardless of their approval or critique of the formal system, consider a link with the system crucial. This is for purposes of recognition of the programmes and for securing a legitimate basis for recruiting their preferred clientele. While the problem is often considered to be the sheer non-availability of the school, in other cases there is a strong sense that the school is missing vital elements in children's or young people's personal development, or does not acknowledge the specific educational, social or cultural needs of young people that have to be addressed so as to enable them to claim their place in the world (Latin America and India). Sometimes, however, the link is such that the school itself is absorbed as a sub-component into the NFE programme (Brazil).

Some examples demonstrate that the relationship of an NFE programme with the state *by itself* does not seem to determine the nature of the relationship with the formal system, or the degree of harmony with its prescribed curriculum. States themselves can and do take their own initiatives, or align themselves with other parties, to establish non-formal initiatives when it suits the needs of the system as a whole, and go to great lengths to protect those initiatives from being overwhelmed by procedures and restrictions that apply to the formal system (Namibia and Tanzania). Therefore, there can be powerful imperatives for states to either expand or contract the boundaries of the formal system, and thus to put their mark on the institutional rules under which the various types of education function in society. This is evident with regard to non-formal skills training, but it is also common with regard to other non-formal programmes, such as those associated with open and distance learning.

It appears that over time states have come to develop the strongest interests in those types of NFE that offer the best possibilities of addressing

the learning needs of large numbers of children and youth, i.e. those that have the best systemic potential, such as the para-formal programmes and vocational skills development programmes. Very often, the state has taken direct responsibility in such programmes, even if it has been through intermediary public or private organizations (Burkina Faso, Namibia). In recent years, these have also tended to become more aligned with governments' social and economic development policies. For reasons of social welfare, interest also appears to have been growing in the literacy with skills development programmes and the supplementary programmes. While sometimes the state takes direct initiatives in these areas (through NFE departments), it may also be left to communities, local authorities or NGOs. The influence of new conceptions of public-private collaboration at the local level, stimulating demand for services, is also visible (Namibia, Somaliland).

The examples in *Chapter 3* also confirm that there are major differences in NFE programmes as regards their ambitions and thus their own criteria of success. Two broad clusters of criteria can be distinguished. One cluster contains those associated with the achievement of *immediate personal* outcomes in terms of people educated or trained, basic skills and knowledge gained, productivity and quality of life improved, and poverty and suffering reduced (Trinidad, Somaliland). These are the outcomes that reflect a concern with immediate needs in the context of pressing social and economic emergencies. In educational terms, the other, often implicit, institutional goal is that NFE cease to exist or be absorbed into the formal system.

The other cluster contains those criteria associated with *medium-* to *longer-term structural* outcomes and the personal dispositions that are required to work on these. The intended outcomes here include: social-cultural awareness increased and its identity recognized; empowerment (i.e. awareness of capacities and having control over one's life); social and political participation practised; and socio-economic exclusion and

(gender, ethnic) inequality reduced, if not eliminated (Brazil, India). Thus, whereas the former constitutes an *adaptive* response to current educational and social conditions, the latter constitutes a more *transformative* response (Hoppers, 2005*a*). The above difference in goals also reflects a divergence in starting points for the establishment of the programmes: One cluster tends to originate from a deficit perspective, i.e. an interest in making up for what is missing in the condition of individuals, that is a place in the system; the other tends to start from a more pro-active perspective of wanting to make a difference, i.e. changing individuals and society. It is also evident that such a variation in ambition runs across the different NFE types, demonstrating that the nature of aspirations is not determined by the model of NFE that is chosen.

The above helps us to come to terms with the institutional dynamics of NFE – that is, its changes and adjustments over time. It is clear that NFE programmes do not remain static, but rather have a tendency to be in constant evolution. Many initiatives are short-lived; others have more staying power and expand over time and/or change their character. The trend in NFE programmes of 'formalization', i.e. the progressive adoption of features from their formal counterparts, is well known. Often, new educational initiatives may originate in the depths of the NFE domain, but subsequently move slowly towards the centre of the educational field (see *Figure 1.1*), *de facto* becoming para-formal programmes. Sometimes they 'mature' to become integral parts of the formal system – for example Kenya's youth polytechnics, Botswana's Brigades, and systems of vocational training in Latin America (see Carron and Carr-Hill, 1991). In some cases, this 'maturation' is planned (Tanzania).

Yet the latter is not an automatic process, nor does it occur in all initiatives, even in those that can be labelled as para-formal education or training or have been in existence for a long time (for example the BRAC sub-system in Bangladesh, or SERVOL). Indeed, maturation comes at a price, which usually means the loss of many non-formal features – such as

flexibility, open entry, interaction with the community – and fundamental shifts in their goals – moving backwards from the transformative goals to adaptive goals. As discussed previously, this reverse change has consequences for the programmes' effectiveness and consequently for their ultimate acceptability.

From a more holistic perspective, within the wider ambit of the educational field NFE can be regarded as an arena in which a variety of pressures for educational reform play themselves out. This has become all the more possible since, due to historical circumstances, forms of NFE in the South have remained the only vehicle by which large numbers of people are able obtain a basic education. The NFE domain has been the arena that could serve as a laboratory (Wilson, 1997: 85) for many initiatives that, in the South, focused primarily on the inclusion of the disadvantaged, the poor and the marginalized, with special emphasis on young women, the unemployed and rural communities. In this arena, traditional forms of cultural transmission or occupational preparation could be modernized through the establishment of NFE alternatives to inadequate formal systems (Wilson, 1997: 85). However, in the same arena, the interests and pressures from different actors in education and development have also become visible, such that as a result it is also a terrain for contesting divergent directions for socio-economic development.

Pressures come particularly from the state, from established and privileged groups in society, from the disadvantaged and their associated organizations, and from external partners. The state represents a national interest in key areas of public policy such as political stability, economic growth, the reduction of poverty and unemployment, and the promotion of social cohesion. It may also defend the interests of privileged groups in the maintenance of the prevailing social and economic order. Within this context, specific socio-cultural communities may push for their interests to be recognized. Disadvantaged and marginalized people tend to try and

maximize their access to opportunities, going to great lengths to utilize available material resources and social capital. In the process, they may remind states of their obligation to protect and promote people's rights, including the right to basic education. People tend to be strongly interested in achieving equal chances for themselves, and even more for their children, to partake fully and on equal terms in social, economic and political life, while non-dominant groups struggle for social and economic space and recognition of their own identity. As Kabeer reminded us, the contestation is often both economic and cultural (Kabeer, 2000). Thus, the direction of educational development and the institutional definition of new initiatives and forms of education tend to be decisive for the terms under which people in the periphery can participate in national life (Bock, 1976). In this vein, the contestation over NFE becomes a proxy for a contestation over the nature and conditions of education and learning in its totality.

The positions taken by the various interest groups become crucial for the nature of educational development. The state may act from a systemic perspective and aim for new programmes to be slotted into the lower levels of the education hierarchy, in accordance with how they appear to serve the needs of the economy or the private sector. In this effort, it may create a sense of national consensus, claiming solidarity between social groups and the state. As a result, NFE typically ends up being a process under the control of an agent of the state, with the objective of affiliating the masses to the purpose and will of the state (Bhola, 1983: 50). However, with such an affiliation in mind, the state may also align itself with other forces in society and promote a more equitable expansion of education and training opportunities; one that finds a balance between economic and social needs. It may be able to come to terms with social movements pushing for very different forms of education that reflect other cultural or social identities.

A significant factor here is the degree of collaboration among disadvantaged groups – and organizations representing them – as regards

alternative social goals and strategies. Where inspirational individuals or social movements can give expression to educational interests and the social, cultural and economic imperatives on which these are based, negotiations with the state over the identity and institutional definition of new educational initiatives take a different turn and do occasionally result in recognition for 'equal but different' education sub-systems. However, as Paulston has noted, seldom has NFE been used to promote ethnic and class identities and to strengthen solidarity within ethnic and social class movements, or to train leaders who will promote ethnic or class aspirations (Paulston, 1980). More fundamentally, in Africa, stakeholders of NFE sub-systems experience great difficulties in fulfilling their transformative potential, even where such intentions have been expressed by the sponsoring parties (Hoppers, 2005*a*).

The importance of NGOs, community-based organizations (CBOs) and faith-based organizations in promoting, financing and protecting NFE initiatives, and thus in giving expression to communities' interests, has often been emphasized. With this in mind, it is difficult to ascertain what the consequences may be of the increasingly prominent role that governments are playing in the NFE field, even where they play a relatively minor role in terms of financial support. Some observers have noted that, in many countries, education NGOs are under great pressure because of diminished resources, insufficient capability and suspicious attitudes or lack of recognition by the state, and because they are losing out to the private sector. It is also observed that NGOs seem to be moving out of the NFE field, leaving this terrain to increasingly assertive ministries of education that, as a result of widespread EFA lobbying, have come to recognize their constitutional and moral obligation to provide for all citizens (ADEA/WGNFE, 2005*a*).

Given the concurrent drive towards decentralization, it is likely that the actual shape of basic education will, to an increased degree, depend

on negotiations between local authorities and communities. There is much scope here for the emergence of more holistic perspectives on basic education provision and of new initiatives to bring local stakeholders together and mobilize available resources. Indeed, small initiatives of this type are in evidence in rural and peri-urban communities across many countries. A significant recent example of this on a large scale in an urban environment is the municipality-community-government partnership that emerged in the mid-1990s in Mumbai, India, as a broad coalition using all available human and material resources to get children into school: the Pratham-Mumbai Education Initiative (Chavan, 2000). Their biggest challenge is to create a vision that can help people break through the conventional ways of thinking and patterns of education provision.

Finally, it can be pointed out here that the stand and role adopted by possible external partners, such as international NGOs, church organizations or funding agencies, is of importance for the direction taken by NFE initiatives and their ultimate fate. External partners can make a difference, not only as regards the financial and material resources necessary to enable an innovation to fully mature according to its original intentions, but also as regards the political clout and policy legitimacy that can protect more transformative initiatives. The downside of this is the risk of increased dependency on external forces beyond the control of local organizations. In addition, the lack of resources combined with poor educational leadership in the African context has caused NFE development in this region to remain very donor-dependent, as a result of which the initiation of transformative forms of NFE in particular may have been much constrained.

2.   The influence of NFE on formal education

Do these contestations in the NFE arena have any repercussions in the form of changes in the formal system? What is the impact towards the formal side of the boundary? It is true that the eagerness with which NFE

programmes wish to interact with the formal system does not seem to be matched by equal enthusiasm on the other side. Moreover, it is generally acknowledged that the formal system is not only well-protected by social interests and a wide array of legal and administrative instruments, it also tends to be inherently very conservative, acting like a juggernaut when deeper structural reforms are attempted. Yet, closer to the surface, there have been changes that are attributed to the influences of NFE and have become systemic features.

Box 12.   Successful non-formal features

- the use of non-professional instructional personnel;
- the use of distance media;
- community involvement in the management of schools;
- an acceptance of community service and productive work as part of school programmes;
- greater efforts to relate curricula and instructional content to local environments and conditions; and
- a recognition of the need for partnerships between schools and community organizations, families, religious groups, and economic enterprises (Ahmed, 1983: 35).

   Others can be added, such as:

- the use of local languages of instruction;
- the practice of ongoing teacher development and support; and
- the use of schools as centres for community support services.

In the early 1980s, Ahmed (1983) found that across different geographical regions there was widespread recognition that education is not limited to what falls under the jurisdiction of ministries of education, that networks of learning opportunities consist of numerous and diverse components that do not constitute one system to be managed and controlled by a central authority, and that learning resources are seen as financial, material and human, originating in many sources (Ahmed, 1983: 35). He

noted that there was a greater receptivity to non-formal features related to organizational structures and pedagogical methods, such as mentioned in *Box 12*.

Similar comments on greater toleration of organizational flexibility have been made by other observers (e.g. Carron and Carr-Hill, 1991).

However, at the same time, Ahmed noted that the implementation and application of such features showed great variations, and that there appeared to have been no fundamental change in the structure, methodology, administration or objectives from those of the formal education system. He posited that the advocates of NFE had presented an optimistic view regarding the possibility for NFE to help in the efficient use of scarce resources, expansion of educational services, promotion of equity in educational opportunities and enhancement of the relevance of education to the demands of socio-economic development. This optimistic view was, however, linked to various enabling conditions, including a national commitment to mass welfare, the decentralization of planning and management in both educational and developmental spheres, and a dynamic context for socio-economic change arising from national development policies and programmes.

His conclusion was that, after two decades, protagonists may have underestimated the problems related to the fulfilling of these conditions and the inertia present in education systems. In particular, they may have underscored the interactive relationship between education and development, as NFE as part of organized learning is both a causal factor and part of the consequences of the development process. As a result, NFE could also end up accentuating the prevailing divisions and inequities of society by "permitting educational policy-makers an escape from facing the contradictions of the social structure reflected in the dominant education system" (Ahmed, 1983: 35-36).

The last two decades have not fundamentally altered the above equation. Since 1990, educational services have started expanding greatly and begun to regain ground lost during the 1980s. Expansion resulted not so much from greater reliance and building on NFE alternatives, but more from encouraging private sector participation. Relevance was also much enhanced, but mainly with regard to the value of education in the marketplace rather than its responsiveness to social and cultural needs. As was discussed in *Chapter 2*, with the arrival of neo-liberal policy discourses and a much-increased differentiation in education provisions, educational and social inequities have only been further consolidated. Indeed, as previously noted, some of the non-formal features that had gained some prevalence as an adjunct to formal schooling were systematically reduced or eliminated during the 1980s (such as work-orientation components). At the same time, the non-formal features that have received greater attention are those related to greater community involvement, including contributions to school development and coverage of recurrent costs. In this sense, NFE has helped make decentralized provision of basic education, whether of the formal or non-formal type, a much more normal and, thus, acceptable situation.

It therefore appears that the internal difficulties that NFE initiatives face are still compounded not only by overwhelming pressures from within the formal system but also by those emanating from the dynamics of wider socio-economic forces. Contestation in this arena remains conditioned, as it were, by what happens on the grandstand.

3. The system's NFE dimensions within basic education

The fluid, dynamic and often problematic relationships between NFE and the formal system, if not among types of NFE themselves, means that at the system level the articulation and institutional links between forms of formal and non-formal education are never neatly laid out. As noted above,

categorization into distinct types is always ad hoc and subject to change. It is confusing that the general discourse about types of NFE tends not to give due consideration to the realities and potential of such education forms, thus obfuscating adequate policy analysis and further moves towards diversification of basic education provisions.

In an earlier part of this paper, it has already been noted that world education conferences have not helped much in clarifying the significance of NFE in general within the wider educational field. Particularly on the African continent, education continues to be collapsed into schooling, while NFE offers temporary compensation for those who do not make it to school. Other forms of people's and citizens' education are not recognized. Thus, the mental distortions as to what constitutes 'proper' education continue to be endorsed, including in the minds of policy-makers and planners. NFE, in all its forms, continues to be associated with dropouts, failures and marginal population groups, for whom it becomes an inferior but low-cost welfare provision. Thus, NFE in public discourse has come to address the effects and consequences of schooling by its "ameliorative responses to the attritive, repellent or abusive characteristics of schools – rather than to help contemplate debates that could lead to the transformation of the monolithic system itself" (Odora Hoppers, 1996: 1). This legacy has in particular had a negative impact on women's education (Odaga and Heneveld, 1995).

The different functions that over time have been attributed to NFE have not highlighted an autonomous contribution that NFE could make to meeting the basic learning needs of children and young people. While originally Coombs had maintained that NFE, as "*complementary* to formal education", stood completely separate from education altogether, as it was seen as a direct component of development programmes, other educationists began to define NFE directly in relation to its function in the context of formal education. Thus, NFE programmes could be a *substitute* for their formal equivalents, offering the same programme, but in adverse conditions, to children in disadvantaged communities, or they could be *supplementary*,

i.e. add-ons to the formal school system, for example, in order to facilitate the transition from school to work. Forms of NFE have also been described as *enriching* programmes, as add-ons to formal school programmes to compensate for certain competency deficits or to deal with difficult and traumatic life situations. Work-experience programmes would also fall into this category.

Finally there are the *alternative* NFE programmes, which is actually a label for those education initiatives that are considered to amount to full alternatives to the mainstream provision of formal education, offering something that is regarded as significantly different from what is available in the latter. What this entails, however, is often not clear and seems to vary from provision of the same programme, but in the local language, to construction of a new curriculum from the perspective of an indigenous culture. The alternative is construed as different to conventional public education, whether it is only marginally or fundamentally different. Thus, the label does not denote the identity of the education provision as such. In all the above labels, one may recognize the specific types of NFE that have been outlined in *Chapter 2* and are referred to in *Chapter 3*.

It is possible to construe dedicated terms that indicate the characteristics of education programmes, irrespective of maintaining an NFE prefix, so as to denote its origin in relation to formal education. In fact, in the context of the South there are many reasons to move away from discriminatory NFE discourse. If anything is to be retained, it is rather the controversial transfer of a western model of formal schooling into southern socio-cultural environments.

In contrast to discredited *NFE discourse*, more could be gained from moving towards an *educational diversification* discourse. This would shift the emphasis on reflection and on policy and action towards recognition and promotion of a wider diversity of educational forms, each of which can have its own place in the educational universe. With regard to initial basic

education, diversification refers to divergent learning systems constituting distinct forms of foundational education for a range of clienteles. The notion of diversity refers to both the supply side – i.e. institutional forms for organizing and managing learning systems – and the demand side – i.e. differences in learning needs, interests and circumstances related to people's social, economic and cultural situation and background.

Diverse education provisions can take on different identities: For example, in terms of *institutional format*, in accordance with learners having other responsibilities; in terms of *technologies*, in accordance with the need to bridge distances; in terms of *content and pedagogies*, in accordance with extra learning needs or different philosophies of education; and in terms of *location*, in accordance with effective organization of learning. There is, however, no implication that diverse social groups must have their own schools. Diversity in education starts with diversity in existing schools, responding to the needs of all learners. No system should permit a proliferation of forms beyond what is necessary in relation to children's needs and interests.

The above thus requires far-reaching democratization of the institutional rules of education formations (Bock, 1976; Kabeer, 2000), whereby access and participation is guaranteed on the basis of rights and entitlements, and quality is protected by the state. Distinctions between different types of education, however, become only one of form, thus losing their political usefulness (Bock, 1976: 366). The underlying vision requires recognition of identity and that different social groups be valorized – especially those that have previously been disparaged due to gender or ethnicity, or those in vulnerable situations – with complementary resources made available to help close economic gaps.

Diversification can only find wide political acceptability if it is based on respect for visions and strong ideas outside the mainstream on equity in the treatment of clienteles and in the distribution of resources, and on

extending the right to education to become at least a basic entitlement related to core curricular outcomes that are nationally agreed upon. This provides many challenges, as the underlying principle of equity may be at variance with the other important principles of egalitarianism. Moreover, by promoting social inclusion through redefining the institutional rules of access and membership, there is a risk of creating new exclusions (Kabeer, 2000: 87).

A common core curriculum would also leave the way wide open for pursuing alternative conceptions of an integrated approach, as has been demonstrated by many NFE initiatives, such as linking basic education outcomes to an exploration of local knowledge, combining basic education with productive work, or putting strong emphasis on personal development and/or social care services (e.g. the supplementary NFE programmes). Equally, core basic education could be linked to forms of community education, and children's learning could be mixed with family learning (Torres, 2003). Furthermore, school education could become part of a broader community livelihood strategy, whereby schooling is combined with life skills development, affirmative social action for women and other groups, and a judicious deployment of community resources and forms of social capital for new social and economic development initiatives (akin to the Australian concept of full service schooling – Henry, 2001). Such initiatives could explicitly recognize the limitations of formal education or, for that matter, expand the notion of what school is all about and add on non-formal components so as to ensure holistic learning experiences.

The above clearly puts a premium on the establishment of effective partnerships between the state (involving different sector ministries), civil society organizations, the private sector and communities. Our earlier examples (*Chapter 3*) underscored the significance of strong civil society organizations as mediators between community needs and the state. Yet, increasingly, the same role is now also being played by local authorities and private sector initiatives. Furthermore, it has been argued that, while

recognizing the difficulties faced by NGOs and CBOs, the formation of broad-based social movements and their engagement with the state are critical in the case of transformative initiatives. Since in-school initiatives by themselves have only a limited impact, they need to be embedded in broader educational reconstruction or social development programmes (Stromquist, 1990).

4. Anchorage points for articulation

What departure points currently exist for such a systemic approach? In recent decades, various systemic initiatives have been undertaken in countries across the South aimed at finding anchorage points for NFE initiatives in the formal system of education. Their strengths have been that they boosted confidence in selected NFE provisions and offered perspectives for educational opportunities beyond their limits. Important weaknesses were that such anchorages confirmed the core characteristics and operations of the formal systems, while extending only very restrictive and unequal participation rights to disadvantaged groups.

Important anchorage points have been: registration and thus formal recognition of NFE provisions; the establishment of ladders and bridges for gaining access to formal sector education and training; admission to examinations and equivalency certificates; the establishment of qualifications frameworks; the allocation of subsidies; and the extension of various professional and administrative support services.

From the point of view of NFE programmes and their young clienteles, the most important of these anchorage points have been the ladders and bridges to regular public schools or to continued training, admission to official examinations, and allocation of state subsidies. These were the areas that mattered for ensuring success in those programmes that mainly addressed the immediate personal outcomes (the adaptive responses

mentioned earlier in the present chapter). By contrast, for those programmes more interested in the medium- to longer-term structural outcomes (the transformative responses), formal recognition of their curricula and access to examination seem to be the more important areas. The granting of these concessions by the state appears to have been very uneven, as this was more likely to happen in the case of larger programmes and those that had powerful advocates and supporters.

The actual experiences regarding the effectiveness of such anchorages also appear to have been uneven. Greater success has been achieved in the area of vocational and professional training, where state co-operation tends to have been more forthcoming in the context of social pressures to relieve unemployment and speed up the creation of employment. This is also the area where articulation is less problematic, as technical skills outcomes are easier to define and measure. Thus, it has been less problematic for the state to officially absorb what appear to be successful vocational sub-systems. It is, however, less clear to what extent the opening up of such learning routes produced a significant flow to higher levels of training of those trainees who had not been successful the first time around. In practice, the estimation of actual prospects in the labour market may have been a dominant factor influencing trainees' decisions.

As regards programmes of para-formal education, actual transfers have been very problematic. Here there is more evidence about discrepancies between the official establishment of articulation links and the actual success rates of transfers. The latter have tended to remain low or non-existent, not so much because of lack of interest among parents or learners as because of the significant differences in the scope and quality of curricula and in school and learning cultures. Para-formal schools tend to have fast-track curricula that, in spite of comparable levels of achievement, leave major rifts in the method of preparation for primary leaving certificates. More importantly, a very positive non-formal feature is that instruction tends to be in the mother

tongue. While this helps greatly in the learning process, it also creates a barrier when trying to cross over into a system dominated by a metropolitan language. A further barrier is that the schools often terminate at a level well short of the end of the primary cycle, making a bridging programme necessary (Hoppers, 2005*a*).

There are also other factors at work. It appears that agencies and governments, in spite of specific policy provisions to the contrary, often assume that *de facto* most learners in para-formal education will terminate their schooling at the end of the cycle and are thus little inclined to make special provisions for transfer. On the contrary, presumed terminality provides justification for restricting basic education to those components that are considered appropriate for improved village life. Furthermore, there is evidence that the more relaxed, informal and participatory learning culture in such schools makes it very problematic for children to adjust to a competitive, highly structured and formal set of learning relations in public schools. Ironically, therefore, the para-schools' non-formal features are the very ones that contribute to effective terminality, as learners are said to be insufficiently equipped to make a successful transition (Muskin, 1996; Hoppers, 2005*a*).

Other anchorage points have been modestly successful in assisting para-formal initiatives to strengthen themselves and to create frames of reference for what they are trying to do. The efforts to achieve equivalency and secure professional and administrative support services help to improve the general quality of curricula and pedagogy and to make comparisons with the formal sector counterparts. The various initiatives taken by government, often in conjunction with civil society organizations and funding agencies, to create NFE development funds from which initiatives can be supported or capacities built on a selective basis, are also helpful. Although the subsidies do not amount to anywhere near an equitable allocation of resources or do not help to resolve some of the most pressing problems in NFE, they constitute a major token of the state's interest in its development.

Of particular significance, though slow in yielding its benefits, is the ongoing work in establishing and expanding national frameworks for assessment, certification, validation and associated support services, bringing programmes under one and the same overarching umbrella. These frameworks focus first and foremost on learning outcomes and their interrelation, and only do so by extending the scope and quality of curricula and pedagogy. In many countries they have specifically been set up or are being contemplated for the entire technical education and vocational training system. Some, like the South African National Qualification Framework, have extended it to all activities of education and training, including all forms of formal and non-formal education. They all have the technical advantage of creating ladders and bridges across the system, so that learners can move sideways and upwards in accordance with their interests and aptitudes.

It must be observed, however, that neither recognition nor official channels for articulation, examinations or subsidies are sufficient to fundamentally change the trajectories of NFE. They only constitute some of the (albeit the important) elements that define the institutional rules and location of para-formal education programmes. There are other elements that appear to be equally, if not more, important for defining the institutional charter of the programmes. These relate to the image and perceptions within the larger system as a whole, and within the formal sector institutions in particular, of educational processes and of the nature of programmes' products. For as long as these are not forcefully counteracted by changes within formal education itself and by new rules and regulations affecting the images and behaviours of those who run the system, not much is likely to change as regards the inferior status of NFE.

Chapter 5
Challenges for policy, planning and research

This final chapter will review future directions for policy and planning and the role that research can play in supporting further developmental work. Attention is given first to the overarching thrust for development in the area of NFE and its relation to basic education as a whole. Thereafter, an agenda for action will be outlined, with an emphasis on the macro and meso levels for policy and planning interventions, followed by an overview of research priorities.

A priority question is whether the present environment is conducive to taking further action. It would seem that the answer has to be positive, given that education in the context of development still receives an inordinate amount of attention, not only from governments in the context of the EFA movement, but also from ordinary people. Never has the awareness of the importance of basic education and its many problems, bottlenecks and shortcomings been so great. Nor have there ever been so many organizations and mechanisms – from the local level to the international level – for exchanging visions, experiences, propositions and critiques about what is wrong and what is to be done in education. Because of the latter there is a greater propensity for action and for mobilizing coalitions and partnerships to undertake it. At the same time, while there continue to be fundamental differences in the perspectives on education and development, and contradictions abound, there is also increased commitment around the world to the principles, if not the practice, of equal opportunity, democracy, human dignity and rights, and diversity.

Yet other observers would argue that an environment cannot be conducive to development if it does not include a national vision of society and the direction in which it wants to go. There are too many stack piles of unresolved questions in education that can only be addressed if there is an active debate on the overarching national vision to give shape to the content and form(s) of education. Historical examples come to mind of Gandhi and Nyerere, both of whom were able to translate a social vision into fundamental premises upon which a new education system could be built. Contemporary possibilities include organizing principles such as people-centredness as distinct from productivity-centredness, which has the generative potential to trigger rethinking in a whole range of sectors, including education (Odora Hoppers, personal communication).

1.   NFE development or educational development?

As regards educational reform, a fundamental question is whether the principle task is to develop the NFE sub-system or basic education as whole. This paper has argued that while there are reasons to continue being aware of significant contrasts between what is labelled formal and what is labelled non-formal, from a policy and planning perspective there are many features that, rather than defining the characteristics of NFE, are derivatives of a central condition that such learning remain outside the boundaries of direct state control, and that therefore can vary in accordance with the distance from this control. As a basis for action, this suggests that it would be helpful to lay out the range of organized education forms (formal and non-formal) and consider which ones need to be of prime concern from a perspective of public policy and whose development, therefore, requires attention in an integrated fashion. The task, then, would not concern NFE *per se*, but rather an overall set of education (and training) provisions – whether formal or non-formal – that play a role in offering initial learning opportunities for children and young people in all their different social, economic and cultural conditions. Further policy development and planning efforts can address

the terms of these provisions so as to ensure a coherent and consistent development of all on the basis of equitable diversity. In such a context, the consideration and possible dissemination of NFE features across divergent education forms would have a central place.

The above agenda is facilitated considerably by the recognition that over the last decades both formal and non-formal education have been changing. While formal education is still the centre of the educational universe, in many countries it has lost to a greater or lesser extent its rigidity, central prescription of content and pedagogy and central administrative control. Whether by design or default, communities and local authorities have become more prominent in influencing the actual delivery of education, including interpretation of the curriculum. School staff have gained some freedom of manoeuvre, if only because more of their resources come directly from the community. In some countries, the recruitment of staff itself has been decentralized. As a result, even while administrative and financial boundaries continue to exist, *de facto* formal and non-formal education have come to resemble each other much more.

The impact of the EFA agenda at country level has also been very beneficial. Its most significant accomplishment has been to expand awareness among the parties involved in education that all children and young people have a right to benefit from basic education. This, in turn, has strongly affected recognition of the plight of many groups that are disadvantaged or at risk in some way or other. Even while the notion of equality of opportunity to progress through the system appears not to be universally accepted, there is at least a growing recognition that the formal school cannot reach all children and that there is thus a need for non-formal alternatives adjusted to local and family circumstances. Thus complementarity and, to some extent, equivalence are increasingly regarded as essential in the EFA context.

The above approach will ultimately have implications for the formal/non-formal divide. An important concern for the state is to re-define the

notion of 'formal-ness' in education. What does this notion primarily refer to? Is it principally associated with certain *institutional forms* of education provision and a certain *way of ordering and managing* learning situations? Or is it first and foremost associated with a common *framework of learning outcomes, assessment and certification*, and a range of basic quality criteria on the basis of which different institutional forms can be recognized and possibly supported? Does formal have to continue being associated mainly with form, or can it be associated with substance, purpose and outcome? As Bock noted, the aim of getting (selected) NFE types to serve the desired allocation needs of subordinated groups of educational consumers can only be achieved if that NFE "becomes socially chartered to confer the same legitimate, accredited access as schooling" (Bock, 1976: 367). In this process, both sides of the boundary would have to change to conform to new national criteria for legitimacy and quality.

It follows from this that the goal of mainstreaming NFE is not applicable. Most non-formal initiatives that wish to remain outside the ambit of government rules and regulations would have no desire to be mainstreamed into any common formulae. For those that wish to retain their vision and identity, while at the same time offering access to national certificates and channels for further education or training – as is the case for many para-formal programmes for children and young persons – mainstreaming would appear to be a one-directional process of assimilation. Formalization under the umbrella of a more democratic and equitable education regime constitutes a form of integration, but one that recognizes diversity and pluralism of forms within a common overarching frame.

In recent decades, the notion of an overarching frame for integration has, however, been elaborated at two different levels. One is that of the *education system* as such; that is, the totality of inter-related and hierarchically ordered institutions, how education institutions relate to other systems or spheres in society (such as the economy), administrative systems,

bureaucratic rules, legal instruments and regulations, support services and quality assurance, and systems for resource allocation and accountability. The other level is that of the *learning society*; that is, the totality of learning opportunities as conceived within a wider societal context, with all their relationships of interdependence and complementarities, both life-wide and life-long (Torres, 2003). While the system's idea is more restrictive and deals with institutional issues, administrative and legal formalities, the idea of a 'learning society' is more extensive and focuses first and foremost on learning. The latter, in principle, encompasses all learning, be it formal, non-formal or informal, and its relative contributions to the lives of individuals and their societies. The notion of the learning society is associated with the tradition of lifelong learning and, in contrast with the concern for institutional mechanisms and rules, is more interested in the relationship and interaction of learning with its social environment. Thus its concern is primarily developmental.

It is relevant to consider issues of integration using both perspectives, as neither are mutually exclusive, but they may well reinforce and legitimize the other. Systemic reform is meaningless without inspiration and philosophical motivation coming from a sense of the overall relationships and complementarity of different forms of learning, as they have developed meaning within their specific social and cultural context. Equally, systemic reforms based on this sensitivity can help in providing greater legitimacy and back-up to different forms of learning through the manner in which they are institutionalized and their outcomes used to claim rights and resources in society. Nevertheless, it should be kept in mind that both notions of integration are not value-neutral; they can be effectively deployed to both narrow down and expand learning opportunities throughout the totality of provisions (Edwards, 1997: 12).

Thus, a greater extent of integration of formal and non-formal forms of education under an overarching systemic framework can still produce different outcomes. If principles of social inclusion, human rights and

social justice prevail, then selected forms of NFE can grow into high-value educational opportunities attracting their own clienteles depending on needs, interests and circumstances, but with *de facto* equal opportunity of access to further education and training, as well as to the labour market. Where such principles are not driving policy implementation, and pragmatism and unequal resources produce a hierarchy of educational opportunities that mainly consolidate advantage, the integrated forms of NFE are likely to remain private schools for the poor and marginalized, and essentially nothing will have changed.

In any case, other forms of NFE, such as those aimed at personal development, will remain in existence outside the expanded system, and depending on national or local circumstances other forms of NFE may gain prominence, whether to assist new clientele as a supplementary provision enriching formal schooling, or to serve as new forms of para-formal education in crisis situations.

2. An agenda for policy and planning action[1]

The challenges for actions in the realms of educational policy and planning will especially concern: decision-makers at the national and sub-national levels; the major national infrastructure of institutions, professional and interest organizations; and civil society and community organizations. Beyond these, there is the wide array of technical and funding agencies and regional or sub-regional organizations.

When it comes to actions that are fundamentally aimed at widening participation in educational opportunities, recognizing and increasing the scope and diversity of education provisions, and building a system that meets the criteria of equity, diversity, inclusiveness and relevance, such actions

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[1]   The text of this and the following section is a re-worked version of what appeared in an earlier symposium paper (Hoppers, 2005*b*).

can only be effective if they are based on a widespread culture of democratic participation in educational development. Constructing a diversified system that responds to the principle of equitable diversity requires considerable dialogue with a wide variety of stakeholder groups, community structures and civil society organizations, in a spirit of reciprocal valorization of identity and difference. It requires participation in defining what a common system looks like: its parameters; its universal core versus its particularistic facets; its common pedagogical principles; its governance; its resourcing; and its supportive services. Democratic participation at the macro-level as well as at the local and institutional levels is the basis for recognition of inclusive practices in or around schools and for meaningful collaboration and complementarity between forms of learning at the local level (Ballard, 2003). Moreover, it is an essential basis upon which people's own resources and capabilities can be mobilized for educational development.

At the system level, the following elements are important parts of a reform agenda.

(i)   *To develop the parameters for minimum conditions and criteria for good basic education in relation to the wider development needs and to the personal development of children and young people.*

This would lay the basis for identifying basic learning outcomes applicable at the level of initial education for children and at the level of initial and/or continuing education and training for youth, and thus for constructing core curricula. Moreover, it would set criteria for acceptable indicators of quality and equity in provision, both in terms of inputs and processes, regardless of institutional form, type of governance and administrative control, and manner of mobilizing resources. Such criteria would allow the elaboration of an 'expanded vision' of basic education, against which present efforts could be assessed. They would also facilitate the recognition, and thus absorption into the system, of forms of para-formal education and of popular education. They would also set the terms under

which institutions would be encouraged to engage with communities or civil society organizations in establishing complementary forms of learning (formal *and* non-formal) through collaborative initiatives.

(ii) *To assess the nature and range of special circumstances and needs of all children and youth in vulnerable situations across the relevant age groups and to explore implications for institutional adjustments to selected learning institutions.*

This would constitute a major systemic effort to move towards fully inclusive education, i.e. incorporating those children into learning systems that recognize and understand their needs, and facilitate the adjustments of learning in terms of both content and pedagogy in a manner that is respectful and equitable (Dyson, 1999; Ballard, 2003). Among other things, this would require a breakdown of the characteristics of both the in-school and out-of-school populations. Available information indicates that the following conditions need to be mapped out and their ramifications properly understood (see also DFID, 2001).

Box 13.   Circumstances to be assessed for inclusive education policies

- *Poverty*: An overwhelming number of children who do not attend school or who drop out at an early stage are from poor households. There is now greater insight into the different dimensions of poverty, covering distinct aspects of human capabilities that vary from lack of income to a range of deprivations in social, cultural, political and protective terms (Sen, 1999; DAC, 2001).

- *Deprivation*: While income poverty is especially a rural phenomenon, this and other forms of poverty are also part of wider deprivation in urban areas. The issue of distance from schools and social constraints predominant in rural areas can be set against the more urban phenomenon of children not being part of conventional households or communities, and thus the absence of network support that these can provide.

- *Disabilities*: Most children with disabilities are out of school where there is no inclusion of those with physical, emotional or learning impairments within the education system (DfiD, 2001: 5). WHO estimates that one in ten children in developing countries has special needs in education, and indeed large numbers of those not yet in school are children with disabilities.

- *Living with conflict*: In Africa in 2001, of the 17 countries with declining or low enrolment rates ten were affected by or recovering from conflict (DfID, 2001: 2). Thus, in these countries many children are suffering from displacement and/or severe traumatic consequences of their experiences.

- *Living with HIV/AIDS*: The number of children infected with HIV/AIDS or directly affected by this illness continues to rise rapidly across different regions of the South. Children tend to drop out of school to care for parents or relatives. Many find themselves becoming AIDS orphans left with the responsibility of looking after their siblings. Figures show that such children are less likely to attend school, or only do so erratically.

- *Work or family responsibilities*: While in many countries children are expected to carry out household duties or work in the fields or family workshops, poverty and deprivation force many to go out and earn an income in order to sustain themselves and possibly their families. Increasing numbers of children live on the streets.

The removal of social exclusion coupled with the right to basic education, including the right to equivalent basic learning outcomes, are the starting points for addressing the needs of children in such circumstances, thus challenging governments and educationists to design provisions that respond effectively, both in terms of opportunity to participate and in terms of the special pedagogical and social attention that such children require. It is essential to recognize the principle that no school or learning centre is likely to provide such an effective response by itself; in most cases collaborative action with communities and/or specialized organizations and institutions will be required to inform and complement the school's efforts. Experiences

have shown that governments, civil society organizations and international agencies often have great difficulty in defining specific developmental goals for children and youth in difficult circumstances (beyond educational participation *per se*) and in effectively accommodating personal and social needs in curricula, pedagogical practices and learning organization (see *Chapter 4*).

The above variations of conditions that affect large numbers of children across many countries are the main motives for promoting diversity in basic education provision, content and pedagogical practice. Governments need to acknowledge that such conditions are unlikely to disappear soon and thus have to be accepted as central reference points in policy development and planning.

(iii) *To engage in extensive and systematic stocktaking of the multiple forms of basic learning that exist in a country, whether labelled as NFE, community or village school systems, religious schools, skills development or livelihood programmes, forms of open and distance learning and the like.*

It is increasingly being recognized that the knowledge base for educational planning with regard to the efforts made towards diversification is highly inadequate. Very few NFE initiatives have been well documented and conditions regarding quality remain poorly understood. National and international perspectives on NFE tend to be strongly influenced by perceptions about a limited set of models of good or bad practice, which have been elevated to international reputation but whose representativeness is usually unknown. Nevertheless, their information tends to be regurgitated time and again, even after its validity has expired.

While initiatives have been taken to obtain a more systematic collection of basic data in NFE settings and to bring these within the ambit of the education system as a whole, problems still abound (ADEA/WGNFE,

2002). Some of these are related to agreement on a proper classification of types of NFE, which itself is compounded by the difficulties in harmonizing conformation to ISCED (International Standard Classification of Education) categories, with the need to have a shared understanding of categories that make sense in a policy and planning perspective (Carron and Carr-Hill, 1991). Others have to do with the extent of data required that can help planning, the difficulties in capturing meaningful and unequivocal information in databases, and the problems of having a constant evolution of non-formal initiatives, thus affecting the reliability of data collected. A significant new initiative to develop a management of information system for NFE has come from UNESCO Paris (ED/BAS/LIT).

Nevertheless, in the context of developing adequate and effective responses to what is outlined under points 1 and 2 above, it is imperative to systematically secure meaningful analytical data on a wider range of NFE experiences (at least those that are important from the perspective of public policy): in terms of their basic characteristics, their learning programmes; factors affecting quality; learning outcomes in relation to the characteristics of their clientele (gender, ethnic background, social and economic circumstances, etc.); their cost structures; administrative, management, governance and support arrangements; and their articulation with the formal education system as well as with the social, economic and cultural environment. It is necessary to understand what it is that has been shaping the initiation and development of such forms of education, exactly what goals they have been serving and for whom, and to what extent and why they have been able to achieve these. Furthermore, it is important to understand the factors that made some initiatives only partially successful or even led to their failure, and to analyze such experiences within the socio-cultural and economic contexts in which they were developed (Wright, 2001).

(iv) *To reconstruct formal basic education for children and youth in such a way that, as a system, it can incorporate a diversity of education and training forms, following principles of equitable diversity and recognizing the need for equitable support services across the full range of options.*

With a vision of basic quality and equivalent outcomes, room can be created within the system to include other forms of basic education, ranging from community schools through religious schools and literacy with skills development programmes, to part-time, itinerant, distance or other open learning variants of education delivery. Such a system would cater for recognition, support services and subsidization in relation to needs within a broader framework of criteria and regulatory provisions. In this effort, the state would have five essential responsibilities other than administering parts of the system itself:

- to provide overall policy co-ordination and planning and development services;
- to develop and implement an overall framework for quality assurance (through standard-setting, registration, monitoring and evaluation);
- to provide equitable supportive and supervisory services across the system – administrative, teacher education and development, professional and financial;
- to administer a policy of affirmative action whereby supplementary resources can be made available to disadvantaged children and youth, as well as to those in vulnerable situations; and
- to maintain a national framework for assessment, validation and qualification.

The above implies that the kind of systemic anchorage points, as outlined in *Chapter 4*, may be in need of extension and adjustment. The provision of policy co-ordination and planning and development services would require a significant extension of the work currently undertaken by

most policy and planning staff in ministries of education. It would also require closer collaboration with other sector ministries – especially health, community development, labour, social welfare, and industry – for the sharing of responsibilities and in developing and supervising mechanisms for inter-sectoral collaboration. A re-organization within ministries of education whereby staff sitting in separate directorates for NFE would be integrated into basic or primary education directorates, but collectively with a new mandate and operating under a new education framework, may also be necessary. This may possibly give rise to new administrative or professional divisions in the ministries at national and local levels.

A significant element in this work would be the degree to which planning and co-ordination of implementation would be decentralized to the local level. Integrated planning, co-ordination and development of basic education in a wider holistic manner – responding to local needs, conditions and opportunities, involving all forms of organized basic education – is a function that is eminently suitable for being conducted at the district level or local equivalent. Capacity development for staff, as well as the strengthening of a corresponding infrastructure for supervision, guidance, data collection and monitoring, may also be required. Moreover, new mechanisms for broad community consultation on holistic education development would need to be established.

The resource issue will be particularly challenging in many countries, partly from a scarcity point of view, and partly because of the political contestation to which such matters may need to be subjected. Clearly, there is a generic case to be made for equitable allocations from the public purse to all children and youth in the designated school-going age-brackets. From a human rights perspective, there is no justification to measure the needs of children – who, for reasons of poverty or other family circumstances, cannot make it to school or drop out and enrol in an acceptable para-formal programme – by a different yardstick from those who find themselves in more fortunate circumstances. Too often, children and their families and

communities are penalized for the structural failures of the formal system as it functions at present. Thus, from this perspective, the establishment of an NFE fund (as is the case in some countries) or of a small budget item for non-formal (and adult) education in the national budget, is a major, but not a sufficient, step towards equitable treatment of all children of school-going age, starting with all those who are learning in some accredited institution.

(v) *To make a special effort to upgrade and expand segments of the system that are insufficiently responsive to the special circumstances and needs of defined categories of learners, and to make the entire system more responsive to development needs.*

From the situational analysis in this paper, it follows that a good amount of planning and developmental work needs to be done. Once it is acceptable that the formal provision of school education can to a certain degree be deregulated (while adhering to the stipulations of the national formal framework for initial education), more attention can be given to how schools can improve quality and relevance in relation not only to the national core curricular requirements but also in terms of improving responsiveness to the socio-cultural identities and needs of different social groups. Moreover, other existing or potential (old-style para-formal) forms of education can be fully challenged to develop their quality and potential in collaboration with support services that can be mobilized – from within the system or from outside.

The latter applies not only to the traditional forms of NFE that are close to the formal system, but also to the many forms of open and distance learning that have emerged over the years. While they have also suffered from insufficient recognition and attention from education authorities, they tend not to have faced similar stigmatization to the non-formal types of education. The development of a national systemic framework enables both categories to be uplifted, to address the learning needs and to explore forms of collaboration without institutional discrimination.

New and more conducive systemic conditions for NFE may give strong impetus to the many efforts that are currently undertaken in so many countries to raise and improve the quality of non-formal provisions for children and young people. The recruitment and training of staff would gain from their incorporation into the national teaching service at a level and on pay conditions that correspond to their background and competences, with clearer avenues for advancement in their educational careers. Their training and continued staff development would be recognized with a national framework for initial teacher education, in-service training and professional development of all educators across the system. The networks that have been developed for NFE across countries and between countries at (sub-) regional levels will continue to expand, but with closer linkages to other education initiatives and their staff who serve similar purposes and have similar approaches. Finally, there would be new frameworks within which policy decisions could be taken and implemented as regards the expansion of selected parts of the basic education system.

3. An agenda for research and development work in basic education

In this final section, the implications will be drawn from this paper for the investigation of policy and practice and subsequent development work that may be required. Without being exhaustive, attention will be drawn first to several key issues related to the development of a holistic and inclusive approach to basic education in general and then to a variety of pertinent aspects of NFE in particular. The section will conclude with pointers relevant for the process of implementing such investigative and developmental activities.

The following are areas in which further investigative work would contribute a great deal to the reconstruction work that is to be carried out in basic education as a whole.

Research and development work related to basic education as a system

The themes below essentially concern a range of issues that seem to result directly from the discussions in this paper. They require significant research and development work, involving situation analysis, comparative research, design work, testing and evaluation before they can be submitted to policy formulation processes. While much of this work should be done at the national level by ministries of education in collaboration with national centres of expertise, a lot can be gained from inter-country collaboration and technical support from the appropriate international institutions.

Box 14.   Themes to explore prior to policy formulation

- *The political economy of alternatives forms of learning and education*
There is a great need to understand the wider dynamics of the rise and fall of NFE for children and young people, whether in terms of older forms that have persisted or newer, more recent ones. Some of the questions that arise are: What shapes the initiation and development of such initiatives? What are the external and internal factors that enable them to survive? How are decisions made concerning curriculum and pedagogy? How is their articulation with the wider education system negotiated? What determines the nature of resourcing and support services? And what are the threats to their existence?

- *The nature of an integrated yet diversified basic education system*
What are the ramifications of widening the existing formal education system by incorporating other forms of education? This requires examination of the basic parameters of an inclusive system, such as defining the core elements of a regulatory framework as against optional parts where diversity would manifest itself. In this context, deeper analysis is needed of the range of bifurcations that cut across current school provisions leading to differentiation of participation, pedagogical responses and educational outcomes, for example in terms of gender, socio-economic background, ethnicity, language, age, ill-health and disability. Such an analysis would

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have policy implications across the system, since teenage mothers, AIDS orphans and working children also attend normal schools. It would inform the revisiting of principles for distribution of support services and resource allocations to the different parts of the system.

- *The establishment of a common core curriculum and minimum criteria for quality and resourcing*
  In the context of an integrated system of initial education catering for a wide variety of clienteles, it seems essential to identify a common core curriculum with corresponding essential learning outcomes that apply across the diversity of provisions and learner characteristics and that have national relevance. Would this have to be set nationally or is there a need for guidelines across countries? What has been the experience of similar efforts in the past? By what consultative processes and with what parameters can such a core be developed? How can a space be created for supplementing the core with other education or support elements that make for a relevant overall learning experience? Could this core be accompanied by a minimum set of inputs and quality criteria required for effective learning, and thus for a set of costed norms for basic education (as has been discussed in South Africa)?

- *Different models of integration at the institutional and system levels*
  Given the different and sometimes contradictory implications of agendas for the redistribution of resources and opportunities, for recognition and respect for cultural identity, and for addressing the specific needs of disadvantaged or marginalized social groups, much reflection and negotiation is called for when defining the nature, degrees and modalities of integration. What types of integration are possible and what implications do they have? How does one balance the contrasting implications of equity and identity? How can the importance of responding to differences at institutional level be matched with interests in maintaining separate provisions?

- *The role of the state and the possibilities for partnerships*
  More work is needed to explore the role of the state in basic education in relation to the role of the civil society, the private sector and communities. The contradictions between the interests of the state as the dominant actor on the one hand and those of other actors who claim a stake in the decision-making process on the other need to be better understood. How much space can be given to communities to effectively participate in educational development without detracting from the core public responsibility for equitable provision and support that the state must maintain? Which are the models that are useful for meaningful and effective sharing of responsibilities among the different parties? And how can such partnerships best be established and capacitated?

- *The balance between quality and equity*
  This issue remains a vexing one and is highly pertinent in the present wave of actions to ensure Education for All. In the rush towards the 2015 targets, not only may full access itself be beyond reach, but quality may also become seriously compromised. In order to free up recurrent funds, teacher salaries are under pressure and communities face heavy costs – often too heavy to bear. Extra state resources to beef up para-formal provisions may be hard to get, as even efficiency drives have their limits. Yet there are strong arguments for minimum norms and standards to ensure educational quality and effectiveness across the board lest the system collapse under its own dead weight. Reducing the costs of basic education for poor households may lead to higher private costs in further and higher education.

- *The development of national frameworks for quality assurance, assessment and qualifications*
  Much has been written about such frameworks as the umbrella under which a diversified yet integrated and equitable system of education can function. Considerable experience has already been gained in quite a number of countries, also in the South (such as South Africa, Namibia and Mauritius). National systems for assessment and qualification are key to

any effort to set core learning attainments and ensure that efforts relating to curriculum reforms are effectively implemented at the level of the classroom. Among other requirements, this may imply serious investigation of the shortcomings and cultural biases of tests and the design of evaluations that promote educational progress in universal aptitudes while respecting local cultural differences (Martin, 2004: 1). Also, many frameworks themselves turn out to be highly complex and costly to maintain, so there is a need for lighter versions that may also enable poorer countries to promote policy coherence and human resources development planning through a degree of integration of systems.

Research and development work related to NFE initiatives

Specifically in the domain of NFE itself, much work still needs to be done in mapping out the full range of education and learning opportunities that it provides for children and young people. This stocktaking needs to go beyond impressionistic descriptions of NFE experiences that currently abound. Basic data need to be systematically collected for a wide variety of characteristics that enable initiatives to be placed within an overall national framework of basic education provisions.

In the different regions, some work on basic data collection is in progress, for example under the aegis of ADEA (WGNFE), UNESCO-IIEP (the basic education research programme) and the Commonwealth Youth Programme. Work has also been undertaken by UNICEF and the Forum for African Women Educationists (FAWE). Its purpose has generally been to make NFE participation visible to policy-makers and planners, and to map the overall resource base of NFE in relation to the rest of the system. Follow-up work may need to be more specific and focus on pertinent categories of NFE provisions, for example in relation to different clienteles or persons in special circumstances, and to their stated purposes – the types of which are identified in this paper. This may help distinguish between those

programmes that wish to remain very non-formal and those that may wish to negotiate their incorporation within the wider national system. In addition, work is essential as regards indicators of quality and relevance in relation to the clienteles that the programmes aim to serve. The latter, in turn, can feed into more qualitative research about actual processes of decision-making; community participation; pedagogical practices; articulation with the wider formal system; the link with cultural or indigenous knowledge; language use; and school-community interaction, etc.

Box 15.   **Specific issues requiring in-depth analysis**

- *The actual processes and dynamics related to the design and establishment of non-formal initiatives.* These include an understanding of the nature, methodologies and extent of community mobilization and the perceptions concerning how such education is positioned within the local social, economic and cultural context.

- *The construction of the curriculum, learning organization and broader pedagogical regime.* This relates to the nature and scope of dialogue among different stakeholders regarding the substance of programmes, their relationship with the local environment and the learning needs and interests of specific categories of children and young people, the purposes the programmes should serve, and how such learning should be facilitated.

- *Actual learning outcomes and achievement in a comparative perspective.* While there is some evidence on achievement, there is a need to assess NFE learners first and foremost in relation to what the provision itself set out to do, and in relation to other relevant, though perhaps unintended, outcomes such as personal development, self-esteem and social competences. This will give clearer insight into the relative advantages of different pedagogical settings, methodologies and styles in relation to those in regular schools.

- *The actual experience of how learning relates to the reduction of poverty and social inequalities (including gender).* This requires exploration of the learning process, the significance of how content and special needs are addressed (if at all), and assessment of how such learning is impacting on children's and young people's lives. What are the interrelationships between basic education and material poverty and deprivation? To what extent is there a relationship between pedagogical practice and girls' empowerment in their family and community settings? What critical factors can promote emancipatory action in the social environment of disadvantaged children?

- *The status and roles of teachers and supervisory staff.* This refers to the factors (status, pay, support) that frame teachers' self-perceptions and those that define their actual role in the pedagogic process. How can teachers' roles be redefined in a context where children tend to be older and more mature and experienced, classes are multi-age and multi-grade, and communities are willing to get involved? What would this imply for teacher education in the mainstream? What assessment is there of different approaches to teacher supervision, support and professional development? Is there scope for a broader recognition of the value of having para-professional teachers in the system?

- *The experiences regarding articulation with the wider education system.* These include the contrasts between the rhetoric about progression and transfer, and the actual realities of the ladders and bridges between NFE and the formal system and how they actually function. Furthermore, there is a need to explore the different curricular options, corresponding exit profiles and actual prospects for further learning (with or without bridging arrangements), and to what extent and on what grounds choices are made.

- *The resourcing and costing of NFE initiatives.* It is relevant to examine in greater depth the investment and recurrent cost patterns of NFE initiatives and the actual burden they impose on communities and individual households. The cost patterns need to be set against estimates of improved and upgraded versions of such NFE provisions. On this basis, more equitable approaches to resource needs and their coverage can be explored. Such investigations would give insight into the total bill for expanding basic education by way of incorporating and building upon non-conventional alternatives.

As regards the research work related to NFE experiences, much can be gained by undertaking this work not only at national level involving local experts, but also at a joint inter-country level. In some sub-regions, teams of researchers have been formed involving university researchers, staff of other centres of expertise and of ministerial policy and planning units working on common agendas under the specific instruction of senior management in ministries of education. Comparative situational review and analysis can feed into selected in-depth assessment of specific experiences, which itself leads to action research related to programme development or policy analysis work. Depending on a country's interests and resource availability, sub-regional organizations could launch their own joint research projects on selected themes or invite an international institute, such as IIEP, to facilitate and support a limited comparative research and development initiative. For this reason, the themes and suggested issues would require further elaboration within country or sub-regional contexts as a basis for research implementation.

All the above clearly produces a huge agenda for a reform of the basic education system. This will take much effort and time. Above all, it requires extensive reflection and dialogue among the immediate stakeholders at country level so as to establish what kind of system is desired and how diversity can be included and extended.

Box 16.   Addressing process issues for effective research and development work

- How to undertake research and development work in a participatory manner, involving researchers as well as government professionals and practitioners.
- How to use research and development work on relevant issues in basic education as an input to policy dialogue at national and local levels.

- How to create spaces at school and community levels for extensive debates on basic education, its nature, purpose and delivery.
- How to create frameworks, procedures and partnerships for joint and integrated planning of diversified basic education provisions responding to the needs and circumstances of a wider diversity of learners across population groups, localities and regions.
- How to approach the task of improving or upgrading NFE initiatives to meet the criteria of quality and outcomes within a human rights and inclusive development framework.
- How to take successful innovations or programmes to scale without damaging the essential factors that contributed to their success or imposing rigid prescriptions on other communities and partners.
- How to mobilize national experiences and expertise across (sub-) regions so as to strengthen research and development work through extensive cross-national collaboration.
- How to bring in external support agencies (international NGOs, technical and funding agencies) in a manner that respects national and local ownership and enhances the quality and success of the process.

This paper has shown that there is a strong case to be made for reviewing the premises on the basis of which type of NFE is being planned, in order to set targets and design strategies. The expanded vision of Jomtien is more relevant than ever in the context of deteriorating social and economic conditions across the South and the many questions about the nature, purpose and provision of basic education that are increasingly being posed. There is a wealth of forms of learning being used by large numbers of children and young people that provide basic education of some sort and require further scrutiny in light of the needs for expansion and quality improvement of education provision. But there is also a great need to do so on the basis of principles of equity, respect for diversity and democratic participation. This sets out an agenda for much work to be done, in a collaborative effort involving the minds and the hearts of all stakeholders.

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