**Improving the Quality and Inclusiveness of Public Policy Formulation**

**at the National Level  
ESP Portfolio Review (30th November, 2015)**

**Defining the Portfolio Parameters**

In ESP’s 2014-2017 strategy, Field 3 encompasses two categories of work: *Good Governance and Democratic Practice: Engaging regional and global institutions in support of open society values*, which focuses on policy formation at regional and global levels; and *Good Governance and Democratic Practice: Improving the quality of public policy formulation*, which focuses on support for efforts to affect policy formulation at national levels. ESP’s strategic purpose in identifying this as a field was twofold. First, we wanted to support efforts to deepen democratic participation around national education policy formation. Second, we wanted to strengthen policy formation that supports the right to education. For ESP this involves ideas that promote quality education in inclusive settings to ensure young people have the skills and experiences for active citizenship.

This review focuses on the latter category and assesses our support for organisations that seek to influence policy formation at national levels. Grants to organisations and processes seeking to influence policy agendas at regional and global levels can be found in the list of related grants because they have been reviewed recently and extensively. The GEAB reviewed our work on Education Marketization & Privatisation in August 2014; we reviewed Engaging Multilateral Organisations, ESP’s Global-level Advocacy at a presidential portfolio review in September 2014, and; the GEAB reviewed ESP’s Post 2015 Engagement in October 2015. ESP’s Technical Assistance to the National Governments of Liberia, Moldova and Burma, which are part of the CoW under review, was reviewed at a meeting of the GEAB in March 2015 and certain other grants in this portfolio were part of an earlier review by the GEAB in April 2014 on The Right to Education. These grants are touched on or updated in this review. We should also note that components of the work of some of the grantees in this portfolio were incorporated in our March 2014 Presidential review on Grassroots Organising and Social Mobilization Orientation in ESP’s Work.

**Placing the Portfolio Review in Its Wider Context**

A sense of crises and contestation around public services and policy is not unusual, nor is it unique to education. There are perhaps three challenges around which national education policy struggles coalesce. The first arises from constrained resources and shifting demographics; this typically leaves little money for adequate maintenance within education systems, for investing and preparing for the long term, or responding to the demands of changing contexts. Donors, even if they are relatively small, obtain significant leverage with ‘free money’ that can be used more flexibly. The second arises where there are growing disparities in education provision; this can be a consequence of limited finances, is typically compounded by poor political leadership, inept planning and bad management, or may be the result of deliberate discrimination. Systemic weaknesses also lead to increasing segregation as wealthier families opt out of public education in favour of private provision. The third site of policy struggle is precipitated by preferred solutions to the first two challenges: these involve invoking a policy template that emulates market forces in education through schools rankings, high-stakes testing for students and teachers, and establishing competition and choice as the main drivers of education reform. This template is part of a suite of measures that is vigorously promoted by major international institutions, which is described by Pasi Sahlberg as the Global Education Reform Movement, or GERM.

These three challenges illustrate the interconnectedness of national and global policy struggles, in which common themes play out in very different contexts. The often ideological, party-political nature of the education policy debate at national levels gives rise to fears that instead of evidence driving policy, preferred policy drives evidence. However, international comparative assessment studies are increasingly important for national policy and have proliferated since the Jomtien Conference on Education For All in 1990. They include the IEA[[1]](#footnote-1) studies, TIMMS and PIRLS, the African-based PASEC and SACMEC, and the OECD’s PISA. The World Bank, which has a portfolio of loans worth almost $9 billion, launched its SABER tool in early 2014 to produce comparative data on education policies and institutions in over 70 countries. Critics consider that these comparative studies consume scarce resources, do not contribute to improving outcomes, generally overlook equity and rights, and reinforce notions that “education is unproblematic and overwhelmingly positive as long as its quality is measurable and assessed systematically”.[[2]](#endnote-1)

The Global Partnership for Education (GPE) is an important actor at national level: it funds public education in 61 countries. GPE also funds the Global Campaign for Education (GCE) and its affiliates through the Civil Society Education Fund (CSEF); the new 2016-2018 proposal of $27m is likely to be approved soon by the GPE board. GPE establishes Local Education Groups (LEGs) in each recipient country; the LEGs are meant to involve local stakeholders and build accountability through evidence-based policy dialogue as a means to ensure the delivery of results. However, the CSEF has generally not led to greater participation by GCE-affiliated national coalitions and most LEGs remain dysfunctional, confusing a handful of NGOs for civil society. Our concern is that the CSEF and the global forces behind them has stripped national coalitions of their political force, rendering them technical partners rather than an independent guiding voice that can articulate and advocate for the most pressing needs on the ground.

**Grants under Review in this Portfolio**

Our support for the 19 organisations in this portfolio presents a series of 35 grants over a 6-year period. The portfolio includes grants to three organisations in Latin America (Brazil and Chile) that will not be renewed in 2016; three grants to organisations in Pakistan that we co-fund with FOSI-Pakistan, a grant to the Ministry of Education in Burma to support the development of their sector plan; two organisations in Europe; one organisation in Tajikistan and eleven organisations in Africa. The organisations are grouped across countries by six approaches that best describe their strategies for change. Related grants supporting national work at regional and global levels are also mentioned briefly in this section as organising the review in this way allows a more comparative reflection on the tactics and tools that are employed to influence national policy.

1. ***National coalition building***

The idea behind the national coalitions for education, most of which were set up in the build-up and subsequently to World Education For All meeting in Dakar in 2000, is that the coalition represents the combined interests of a range of civil society actors and will exert greater pressure to further the right to education. In our view, there are few national coalitions under the Global Campaign for Education (GCE) umbrella for which this is true. Our analysis is that the primary orientation of the GCE to the global education agenda creates an upward orientation through its ranks: an aspiration to be a delegate on ever-higher structures. This is opposite of the grassroots orientation we want to support. This realisation has led us to be selective in choosing partners among the nation coalitions (and, for that matter, the regional coalition structures). This section reviews our support for the Brazilian Campaign on the Right to Education (BCRE) – *Campanha Nacional pelo Direito à Educação*, the South South Cooperation Project (SSCP), the Cape Verde National Coalition on Education for All (RNCEPT) – *Rede Nacional de Campanha de Educação para Todos*, and the Pakistan Coalition for Education (PCE).

South South Cooperation Project (SSCP): We were attracted to the Brazilian coalition, BCRE, because of its reputation for effective campaigning at national level and because we were seeking a partner to help strengthen the weak national coalitions in African Lusophone countries to build their voice within the African Network Campaign on Education for All (ANCEFA), the regional GCE regional coalition. We began the SSCP as a joint initiative with BRCE in November 2010. The Brazilian coalition was an inspiration for the nascent African Lusophone coalitions and it had the organising experience and language skills we were looking for. The objective was to support the development strategies for the coalitions’ engagement with their governments to influence education policy and provision to further the right to quality education.

The SSCP has not succeeded fully in this original objective. The project was able to finalise advocacy strategies in Angola, Cape Verde and Mozambique with support from partners in two Brazilian universities and co-funding from the Early Childhood Program – as early childhood care and education emerged as the priority theme for them. It became apparent that it was premature to develop advocacy strategies in Sao Tome & Principe and in Guinea Bissau, where schools were suspended for almost a year and teachers were not paid. The Mozambique coalition, MEPT *– Movimento Educação para Todos*, which was the strongest Lusophone coalition when SSCP started, struggled after financial irregularities were discovered in 2014 and is only regaining credibility and trust now. The Angolan coalition, EPT – *Rede Educação para Todos*, is reluctant to be vocal in its criticism of the government. We decided to phase out SSCP at the end of 2014 and designed a two-year process to enable the Cape Verde coalition to take on a convening role for the Lusophone coalitions. BCRE will host a final SSCP meeting in Porto Allegri, in January 2016, to strengthen strategies and fundraising.

The only real success so far is the Cape Verde coalition, which has a broad social base as well as institutional capacity and advocacy experience. The coalition developed a strong relationship with the University of Cape Verde through the SSCP, and it has gone on to develop further research and advocacy. ANCEFA, which is emerging from a period of uncertain leadership itself, has appointed a new Lusophone Programme Officer, who was formerly one of the university researchers from Brazil who had contributed to the SSCP.

*Campanha Nacional pelo Direito à Educação* (BCRE) was established in 2000 in the run up to the World Education Forum in Dakar. It is the largest and most active civil society network in defense of public education in Brazil. It has twenty-five regional committees and has nearly 200 member organizations, including grassroots civil society organizations, education worker unions, NGOs, INGOs, social movements such as the Brazilian Landless Workers Movement as well as thousands of individual members.

BCRE has an impressive track record of successful advocacy campaigns and is a respected and influential organization in Brazil. It spearheaded a number of advocacy campaigns that led to significant gains in public funding for education, teacher remuneration and early childhood education. ESP made a separate institutional support grant to the BCRE in 2015, which supports their new advocacy cycle around the implementation of the new National Education Plan and activities to support an informed national debate on education privatization in Brazil.

Pakistan: Pakistan Campaign for Education (PCE): ESP has funded PCE since 2013 but has collaborated with FOSI-Pakistan to support the Pakistan national coalition for education, PCE, since 2009. PCE was started in 2005, it is an experienced campaigning coalition with over 200 members. PCE launched a significant campaign 6 months before the national election in 2013: Vote for Education. This campaign aimed to strengthen political commitment to Article 25-A of the national constitution, which is on the right to education, by placing it firmly on the agenda during the election campaigns. The Vote for Education campaign achieved vast media coverage/

PCE has organized several other campaigns, including one on girls’ education, another on budget monitoring and a consultative process around the Post 2015 goals. Their tools and tactics include talk shows on electronic media, updates on Facebook and Twitter, big walks, rallies, press conferences (in more than 45 districts), consultative workshops for journalists, street theatre, puppet shows, peoples’ education assemblies and policy papers. They have three writ petitions in the High Courts of Lahore, Peshawar and Islamabad seeking promulgation and implementation of 25-A at a provincial level; and they have hosted a weekly radio show on AM 1152 that receives more than 70 calls per program, though it is only able to feature 10-15 calls per show. PCE has developed an impressive set of advocacy tools in its campaigns and unlike many other national coalition structures, its activities increasingly focus on social mobilization.

1. ***Social mobilisation***

The two organisations in this section focus their efforts on organising constituencies of students and parents rather than building broader advocacy coalitions. Both support collaboration with other organisations, but their own campaigns have clear priority. Equal Education was part of a portfolio review of our support on The Right to Education with the GEAB in April, 2014. The Integrated Education Fund was part of our portfolio review on Grassroots Organising and Social Mobilization in March, 2014. Both organisations are part of the field under review and are very purposeful in the way they engage government to affect the formulation of public policy.

South Africa: Equal Education (EE): ESP has funded EE since 2010, two years after the movement started. EE began as an afternoon reading project in the Khayelitsha township of Cape Town that involved pupils from local schools and students from the University of Cape Town. Its first campaign was to fix broken windows in one of the local schools; it moved on to mend a leaking roof and then on to larger campaign to end late-coming in schools across the township. This built a lot of support among parents as well as, perhaps surprisingly, school pupils. It did lead to clashes with the local branch of the teachers union SADTU, which is a relationship that EE still has to manage carefully.

EE has grown into a strong movement of learners, parents, teachers and community members; it has attracted wide and growing support nationally. The two campaigns that first caught the national imagination were the national campaign for a school library and qualified librarian in each school and their successful campaign to get the Ministry of Basic Education to publish a set of norms and standards for South African schools. It has followed on with campaigns on school sanitation, textbooks, transport to school and school infrastructure. These campaigns involve rallies, marches, petitions, sophisticated media strategies and court action. EE is currently focusing on getting the norms and standards implemented now that they have been published.

EE established the Equal Education Law Centre (EELC) in 2012, in order to respond to the constant stream of requests they started to receive as their national profile increased. EELC is a legal clinic and public interest litigation organisation that is focused on realising the constitutional provision on the right to education. We do not fund EELC, but they work closely with EE, both organisations have successful transitioned to new leadership in the past year and continue to gain strength, recognition and momentum.

Among its strengths we note that EE has maintained its focus and cohesion despite becoming a national movement. They have branches in every province now that identify new campaigns and take forward national ones. The organisation has strong internal accountability and its leadership has to stand for re-election at a congress EE holds every three years. It is a clear sign of strength that the organisation has been able to develop a stream of competent leaders; the two founders of the movement, Doron Isaacs and Yoliswa Dwane, are still significantly engaged, but they no longer occupy frontline positions. EE has managed to build a broad social base, but its key strength remains its school pupil members: the “equalisers”.

Among our concerns is that the organisation is hugely reliant on donors funds. They have secure funding and have started building up a network of supporters who pay monthly subscriptions. Our emphasis will be to continue to help them to build alternative income streams. There are also risks associated with a process that completely re-elects a leadership every three years. Their legitimacy depends on this. ESP and OSF-SA will continue maintain a close relationship with EE so that we understand its internal dynamics as the organisation grows.

Northern Ireland: Integrated Education Fund (IEF): IEF is a community-based, largely parent organisation, that is over 20 years old and structured as a community foundation. It reflects the wishes of parents who want a non-sectarian education for their children, involving them actively in setting up new integrated schools and campaigning for the Northern Ireland Assembly to adopt a more enabling policy on integrated schools. Currently, salaries, refurbishing and building costs have to be found by the community, as the government provides no support for the first two operational years of a new school.

Since our last portfolio of IEF early in 2014, the organisation and its partners have won a High Court judgment, in May 2014, which has far-reaching implications for education in Northern Ireland. A standing section of the 1989 Education Order imposed a statutory duty on the Department of Education in Northern Ireland to “encourage and facilitate the development of integrated education”, which underlined in the Good Friday Agreement. A judicial review was brought by a school in Drumragh, supported by the IEF and Public Interest Litigation Support (PILS), ordered the government to comply by increasing capacity in the school to meet local demand. This is a significant step forward for integrated education in Norther Ireland.

IEF schools are always willing to accept “newcomers”; they did so after the attacks on the Roma community in Belfast in 2012, and we supported their efforts to take in Polish immigrants after a spate of violence against them in 2014. We have also established a working partnership between IEF and Nansen Dialogue Centre in Vukovar, Croatia, where our partners are trying to build local support to establish an integrated Catholic-Orthodox school.

1. ***Issue-led advocacy***

The grants in this portion of the portfolio relate primarily to the issue of marketization in education. Our broad approach was to develop a body of evidence to document the impact of growing marketization in the education sector and support the efforts of our partners who gathered this evidence advocate for change through engagement with UN Treaty Bodies. Our approach to this work has been modified based on discussions during our most recent strategy development process and we explore some of these shifts in the later sections of this document.

In 2014 and 2015, ESP has worked with three African organisations to develop their advocacy strategies around privatisation and the right to education, these are: the Initiative for Social and Economic Rights (ISER) in Uganda; the Economic & Social Rights Centre/Hakijamii, in Kenya; and the Ghana National Education Campaign Coalition (GNECC), an ANCEFA affiliate.

ISER is a Ugandan human rights organisation that is a partner in the research ESP supported through the Privatisation in Education Research Initiative, PERI. The Ugandan government actively supported the establishment of private schools since the country liberalised its education sector in 1993 as part of its Structural Adjustment Programme. The Ugandan private educational sector is very diverse and ISER was particularly concerned about the effects of low-fee private schools. ISER presented a report to the CESCR[[3]](#footnote-2), which asked the Ugandan Government to explain the impact of privatization in education “on the right to education of girls and children living in poverty” and recommended that Uganda “strengthen regulations and expand monitoring and oversight mechanisms for private education institutions”. This has strengthened the position of ISER and its partners in Uganda enabling them to engage the media effectively, and establish a more-informed public debate on this issue in Uganda.

Hakijamii was also a partner in ESP’s PERI research on privatisation and the right to education. They led the research on privatisation in education to inform two separate parallel reports submitted to the CRC and the CESCR. The organization was also successful in soliciting questions from the CESCR round informal schools and regulation, which has helped to catalyse national debate around the impacts of the rapid growth of private provision, in particular of low-fee private schools in the Mathare slum in Nairobi. It has also fostered discussion around state accountability, and enabled Hakijamii and other organisations to pursue advocacy with national policy makers around standard setting on privatization and the right to education.

The national coalition in Ghana (GNECC) was formed in 1999 and has grown steadily into a network of 77 civil society organizations and professionals committed to promoting education for all. GNECC’s research revealed that this growth of private schools leads to segregation based on wealth, reflecting the persistent income inequalities across Ghana, which it used to produce reports to human rights bodies, including the CRC and CEDAW who then raised questions with the government. This generated media interest and a public debate forcing the government to respond to the issues. The government now accepts that private participants require greater oversight and regulation and consistently consults GNECC on policy related to privatisation in education.

We consider that this strategy has been very effective for increasing public debate at the national level on the issue of low-fee private schools and the need for better regulation and for getting the government to take this issue seriously. Work we supported through the Global Initiative for Economic Social and Cultural Rights (GI-ESCR) had similar results in Morocco. Our concern is that adequate support and relationships are put in place to ensure adequate follow through after these actions. It would have made a huge difference to have had a stronger buy-in from the national foundations, with which we shall work closely as we develop a framework for the better regulation of private sector participants in education over our next strategy phase.

1. ***Citizens’ assessments***

The approach develops the idea of social accounting and social audits that have been around since the 1950s and were thought through mostly in relation to socially responsible business practices. These methods were given renewed vigour by the environmental movement and civil society reactions to state corruption. The citizens’ assessments of education outcomes are a relatively new application of this tool for influencing public policy on education and education outcomes, which were developed initially by Pratham in India and funded by Hewlett.

The Pakistan: Annual Status of Education Report (ASER) is an enormous logistical operation. This year it covered 144 rural, and 21 urban, districts across Pakistan. The sample includes data on 279,427 children of age 3-16 from 4698 villages/ blocks and 93,093 households that was collected with the help of 10,000 volunteers.

ASER’s stated intentions are to mobilize government and citizens to take action to improve the quality of education. ESP and OSF-Pakistan are particularly interested in the potential of *village baithaks* (community discussions) to deepen democratic participation and inform parents better and to hold local politicians to account. ASER is frequently quoted in government documents and sector analyses both within and outside of Pakistan; they are widely regarded to be one of the most prominent examples of citizens’ engagement in education.

A recent evaluation ESP funded through R4D in Washington, however, points out that despite the numerous citations of ASER Pakistan data, these is no causal evidence linking the use of ASER data to changes in education policies and planning processes. The evaluation also points out that most of the effort by *Idara-e-Taleem-o-Aagahi* (ITA), the organisation that conducts the survey, is focused at the policy level, there is little focus on the community level. The evaluation also finds that initial efforts to engage communities through *bhaitaks* have not been shown to generate awareness or action at the community level, it recommends that ITA and supporters of ASER Pakistan should consider pursuing a concerted focus on deeper community engagement. While we remain impressed with ASER’s clear abilities to organize and mobilize citizens, we feel instinctively that the evaluation findings are correct and there clearly is a discussion that needs to be had during ESP’s visit to Pakistan in December 2015. The evaluation also suggested that the survey should be hosted every other year, which would provide some respite from the Herculean effort of completing the survey annually and allow more time for reflection and building grassroots involvement.

ESP was among the early funders of this work in East Africa after the spread of the ASER methodology from India. We provided funding for Uwezo, the first citizens’-led assessment in of education in Africa by the Kenyan organisation Twaweza also with funding from Hewlett. We have watched the citizen’s assessments movement take hold in seven African countries. A new organisation, the People’s Action for Learning (PAL) Network, has been set up to promote and support the nine citizens’ led assessments. We are interested in making a contribution to support them but the difference between the hype and the reality on the ground that we have uncovered in Pakistan, gives us pause.

1. ***Policy analysis and monitoring***

Three organisations under this theme primarily use policy analysis and monitoring as an approach to influencing the quality and inclusiveness of public policy formulation, *Ação Educativa* *(AE)* in Brazil, *Proyecto Propio (RED)* in Chile and the Campaign for Quality Education, Pakistan.

Ação *Educativa (AE)* is a Brazilian NGO that grew out of the social movements in 1994. It has great experience in advocacy on social justice issues and a successful record of promoting social participation in public policy formation. Since 2014, ESP has supported the organization to develop an Education Observatory which seeks to promote transparency and advocacy to hold the government accountable for education policy on issues such as privatisation, inclusion and the right to education. ESP provided three small grants to an intermediary organisation, *Proyecto Propio*, to support the development of a strategy to establish the basis for future growth and influence of an organisation founded by the former leaders of the Chilean student movement: *Red de Estudios para la Profundización Democrátic (RED). RED* hoped to consolidate a network of actors from different social and political spheres around a common vision during the significant political, social and economic transformations that Chile is currently undergoing.

The strength of *AE* and *RED* is that they are deeply rooted in social movements. In both cases these organisations represent efforts to move from active street-based protest to more systematic policy research and analysis. Both are struggling to secure adequate funding in the Latin American space. While we regret we shall not continue supporting these organisations, we agree that achieving anything worthwhile in Latin America would require adequate resources, a longer term plan and deep knowledge of the region. ESP has none of these. The lesson for us is that we need to have these assurances in place before we start work in a region. There was no indication that the regional foundation was going to pursue any work in education.

Campaign for Quality Education (CQE): ESP and OSF-Pakistan worked to establish CQE a decade ago when OSF started work in Pakistan. CQE is less of a campaign, however, and more of a policy research unit that incorporates about 30 of the more critical thinkers in education policy in Pakistan and produces thoughtful and useful work. Their successful policy work includes an analysis of language and learning in Punjab which argued that using English as the medium of instruction in early grades hampers learning. This led the provincial government to implement policy to delay the introduction of English to Grade-3. CQE is trying to bring about the same result in Sindh Province.

Citizenship education is another major concern for CQE. It established *Humshehri* (We citizens) a website that provides a citizenship resource for teachers and students. It highlights the strains of diversity and tolerance in Pakistan’s historical and cultural context. CQE put out a book in collaboration with the South Asian Free Media Association (SAFMA), which was published by Oxford University Press: Educational crisis and Reform. This year CQE published the first of its biannual Education Monitor Reports, which focuses on the key elements of quality at the school level, including teachers, textbooks and assessment systems.

Much of ESP’s support for policy analysis and monitoring is carried out at the regional and global levels and are in the list of related grants to this portfolio review. These include our grant to the Tom Alexander Fellowships at the OECD, our support for the Global Education Monitoring Report, which is housed at UNESCO and our support for the Network of Policy Centre, that does regional comparative work, but whose members are very active at national level in their own countries. We have seen that the regional and global comparative work can make powerful contributions to national advocacy to influence policy. All governments want to compare well with others. At the same time, the advantage of national-level policy work is the potential for connections with social movements and the better understanding it provides of how to pitch advocacy messaging. Currently in this portfolio, it is the social movements and national coalitions that know how to shift public opinion and are able to combine activism with effective advocacy. RED and AE come from social movements. RED, particularly, wants to reposition itself as a credible and still critical voice now that many of its close associates are in government.

1. ***Direct Technical Assistance to Governments***

Most of our key grants and consultancies that provide direct technical assistance to governments were reviewed at a meeting of the GEAB in March 2015, entitled “ESP’s Technical Assistance to Governments: Liberia, Moldova and Burma”. We do not intend to review them again here, however, given the five approaches to influencing government policy we have just addressed, it would be remiss not to include brief reflections and updates.

Our support for Liberia, Burma and Moldova, was in response to a request from George Soros to support the political transitions in those countries. Certainly in the case of Moldova, but especially Liberia, our subsequent engagement required considerable staff time and resources. Burma, so far, was approached differently, in spite of the request for direct engagement, and our support consists of a single grant to the education ministry to support the Comprehensive Education Sector Review (CESR), which sought to expand enable increased engagement from national education specialists in the development of education sector plan and associated policies, which was previously a donor-dominated process. Our funding enabled the CESR to formally engage a core group of 26 senior national education advisers in the review process. We were very determined to address the undue influence and incorporation of donor interests in the landmark sector plan and ensure that national priorities and knowledge were adequately reflected. This feature of the work is also strongly reflected in the work in Liberia and Moldova, where ESP had to provide in-house expertise and rely on people in the wider OSF network that we know we can trust.

Other opportunities for direct technical assistance to government arise from time to time in our work, these include: advancing education inclusion in Mongolia, the National Testing Centre in Tajikistan, and strengthening teaching practice in Malawi and Zambia. In each of these cases, we feel our work with a receptive government positions us well to influence not only the quality and inclusiveness of public policy formulations, but potentially their implementation. This is particularly the case in Mongolia where, with ECP, we supported the Government to build a national center for support to children with the ultimate goal of redeployment of resources and expertise from special schools to support the integration of children with special needs in mainstream schools. Our funds were also used to generate public support for inclusion in rural areas. In Tajikistan, we provided support for the national foundation’s efforts to establish the National Testing Centre. The purpose of the centre was to provide a way both to support education quality through putting in place reliable testing systems and to stop corruption around admissions. Our main contribution was to provide technical advice through a former board member but this proved costly to maintain. We have been directly involved with OSISA, since 2012, to support efforts of the Ministries of Education, Science and Technology (MoEST) in Zambia and Malawi to strengthen teaching and learning and improve student learning outcomes. We actively engaged the Malawi government in their efforts to make the systemic changes that will inculcate a critical thinking emphasis in their curricula and shift teaching practice toward more learner-centred approaches.

Related ESP work that we undertake through other organisations, rather than directly ourselves, includes the OECD Integrity in Education Systems (INTES) project in Ukraine, our ongoing support for the Network of Education Policy Centres, NEPC, which provides technical support on education quality and inclusion in most of the countries in which OSF formerly had foundations. In the case of our long collaboration with the OECD, the INTES methodology used in Ukraine was developed in Serbia in close partnership among the OECD team, ESP and the national foundation. INTES was subsequently refined in Tunisia and has been picked up by the national foundation in Armenia, which is launching its research findings during the last week of November. We shall need to build on these long-term relationships in order to influence policy in these countries to refugees and migrants.

**Lessons the program is learning**

1 – It seems, on the surface, that clear and direct, relatively isolated actions can lead to the desired policy result. The evidence-based argument of the CQE Learning and Language report did seem to persuade the Punjab Provincial government to delay the introduction of instruction in English till Grade 3. Formal questions to governments from human rights bodies in Geneva to governments in Ghana, Uganda and Kenya did seem not only to make them sit up and take notice, but to take national organisations seriously. A well-chosen case in put before judicial review by a school in Drumragh, Northern Ireland, did remind the government of its obligations and get it to act on prior agreements. But even if we are sure about the causal relationship in these instances: *it does seem that both the context and the moment have to be right for single actions to work; strategy must always involve a ‘clear ask’ as well as a ‘smart action’.*

2 – The success of EE’s norms and standards campaign, however, seemed to come from a combination of huge social pressure and well-chosen ‘smart’ actions, when to go to court, whether or not to accept a settlement; the Brazilian education coalition and the Pakistan education coalition also seem to rely on huge social pressure to force chance, this was the logic and the success of the student movement in Chile: they are now the policy-makers. Given the sheer size of the ASER study in Pakistan, it may seem strange that they have not had an easy policy victory, but their ask is for improvements in a whole system, not a ‘clear ask’ for a two-year delay in the language of instruction. The outcome of the judicial review in Belfast might have been different without the ‘right moment’ that it took IEF 20 years to make. Each of these strategies do seem to recognise that *public opinion and social mobilisation are indispensable for creating the policy climate in which the right idea can be put forward a the right time.*

3 – The most important lesson in this field is probably *to be sensitive to context and to be guided by in-country partners, ideally both national foundations and grantees.* The strategies and grants in this review were guided by our close collaborations with FOSI-Pakistan, OSISA, Soros, Foundation Moldova, Open Society Forum in Mongolia, OSIAF-Tajikistan, and we’re sure the work in East Africa would have been enriched by a closer working relationship with OSIEA. The wrong thing to do, would be to assume that a strategy that worked in one place would work as well in another.

**The way forward**

1 – Field 2 in our 2016-2019 strategy is about activism and advocacy, not just to influence policy generally on a range of good things, our focus is on shifting public opinion, practice and policy very specifically around inclusion, in closer partnership with national and regional foundations, and in a more targeted range of geographies.

2 – ESP will continue refining our approach to that problematizing education policy formation and implementation because our ultimate goal is ensuring space for civil society in education. Those most deeply affected by education policy can be pushed out of discussions by closing spaces for civic participation when the influence and dynamics between public and private actors shifts out of balance, either through circumstance or through a deliberate desire to limit organized activism. Moving forward we will shift our focus away from Latin America to engage more deeply on organizations in Africa, where foundations are more actively engaged in similar issues.

3 – Our work related to privatisation and marketization in education will focus on developing a regulatory framework for private participants in the public education sphere, the related activities in this portfolio have already prepared some of the ground for this work.

**Annex A: List of Grants in this Portfolio Review, Related Grants and Non Grantees**

**Annex B: Media Coverage by Grants in the Portfolio Review and Related ESP Grants**

1. International Association for the Evaluation of Educational Achievement (IEA), Trends in International Mathematics and Science Study (TIMMS), Progress in International Reading Literacy Study (PIRLS), *Programme d’Analyse des Systèmes Educatifs de la CONFEMEN* (PASEC), Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ), Programme for International Student Assessment (PISA), Systems Approach for Better Education Results (SABER). [*CONFEMEN - Conférence des Ministres de l’Éducation des États et Gouvernements de la Francophonie.*] [↑](#footnote-ref-1)
2. Klees, Steven J., Samoff, Joel, Stromquist, Nelly P. (Eds.) (2012) The World Bank and Education: Critiques and Alternatives, Springer: New York. [↑](#endnote-ref-1)
3. United Nations Committee on Economic, Social and Cultural Rights (CESCR); Committee on the Rights of the Child (CRC); the Committee on the Elimination of Discrimination against Women (CEDAW). [↑](#footnote-ref-2)