

On the International Dimension of Education and Social Justice

*Stephen P. Heyneman**

Background

Throughout history, people have found only five ways to choose leaders: by inheritance, force, chance, political loyalty, or achievement. Only with the last, by achievement, has there been an attempt to question how opportunity for participation might be equitably distributed. Broad access to schooling has been society's way to ensure that future leaders might be drawn from the population at large, with a universal opportunity to participate. Plato might have been the first to propose that occupational preparation be renewed with each generation and based upon what each individual was able to achieve for himself. Thus, the social justice rationales (the equitable distribution of opportunity) for education are both radical and ancient.

Implementation of this 'footrace' remained relatively dormant until the Industrial Revolution. Before then, families were the primary economic unit and the appropriate function of education was to maintain the productivity of the family. Skills were passed from parent to child. Until the time when children were not expected to remain within the family economic unit, educational opportunity, much less equality of opportunity, was hardly relevant. Today, in spite of the concerns of many social liberals, occupational choice is less determined by family of birth than at any time in human history.¹ Only in the most isolated geographical areas (among desert nomads and forest tribes, for instance) is parent-to-child occupational transfer automatically conducted without intervening influence from the economy or the state. This worldwide change in the nature of occupational selection makes the quality of educational opportunity a universal issue.

Definitional Requirements of Equal Opportunity

An equal opportunity strategy is justified by the premise that human beings differ, and therefore some will utilize resources more efficiently and more quickly than others. The purpose of all equal opportunity strategies is to assure that, as nearly as feasible, all will have equal chances to utilize resources. Key to the concept is the notion of equal exposure to the resources necessary to participate. Whether those resources are equally utilized does not determine whether equal opportunity has been achieved. Equal opportunity acknowledges that inequalities in utilization will not disappear.

Whether some inequality is morally acceptable in a just society is the subject of a dialogue between some fields of sociology and moral philosophy (Rawls, 1958, 1971; Coleman, 1973, 1974; Nozick 1975; Bane, 1975). The pro and con arguments hinge on the following: if one accepts an equal opportunity strategy it implies that one must accept the existence of appropriate or proper differences among people. Society must agree that these differences are just and have been achieved fairly, as in, for example, differences in achievement in sports, chess, and physics.

When faced with a demand for equalizing geographical opportunity within a country, several definitional criteria might be utilized. As a practical matter, the four checks proposed by Bell and Robinson (1978), Berne and Stiefel (1984), and Rice (2004) seem pertinent: (i) that the criteria be based on some-

* Vanderbilt University.

¹ The key here is to make a distinction between being 'determined' by the family as opposed to being 'influenced' by the family. The former is no longer common; the latter is universal.

thing which can in fact be distributed; (ii) that a unit of analysis such as neighbourhood, region, or individual be specified; (iii) that the degree of distribution be measurable; and (iv) that the consumers agree that the item is a good measure of what should be fairly distributed.

Equal Opportunity of Education Among Nations

A new international definition of basic human rights emerged from the United Nations agreements signed at the end of WWII.² There were guarantees of freedom of many kinds – from hunger, persecution, and prejudice based on race, gender, religion, and national origin – as well as a guarantee of education. In the Anglo-American context, the rights of individuals were thought of as being constituted prior to the state itself. In Europe, the rights of individuals were thought of as being guaranteed by the states (Bendix, 1964). Because there is no single authority which can operate above the nation-state, individual rights have been thought of as being part of a natural law applicable to all human beings. This is the natural law cited as the source of authority by the United Nations in its declaration of human rights (Lauren, 2003).

Now, a half century later, it might be worthwhile to ask what has been accomplished. One could hardly argue that the world is free of prejudice or persecution. Hunger, malnutrition, and disease continue to be serious problems. One arena in which the world can demonstrate advancement is the field of education. This advancement has been made in spite of the obvious handicaps frequently cited in the development economics literature: population growth, civil war, disease, political and economic inexperience of local leaders, poverty, and competing economic and social priorities.

The explanation for this advancement is not difficult to discern. The world's first experience with public education was in the late 18th century in Prussia. It arose from a need to achieve social cohesion across a community suddenly divided by Catholic and Protestant citizens (Heyneman, 2000). Thus precedent was established for some citizens to help finance the education of other citizens to whom they were not directly related. In the United States, equal opportunity has recently been defined as equality of opportunity across school districts within the same state. Recent state supreme court rulings have now made inter-school district financial redistribution the norm in most places (Baicker & Gordon, 2004; Berne & Stiefel, 1999; Corcoran et al., 2003).

This equality of opportunity strategy has generated both support and protest. In the United States and other places, since educational finance is often dependent on local property taxes and since local property taxes require a public vote, it has been argued that a reallocation toward lower income school districts will lower the incentive for the public to tax itself for education. In fact, some high income school districts have established educational foundations as a partial response to reallocation of educational resources. Some see this as a means by which wealthy parents provide educational quality for their children while avoiding providing resources for others' children (Carr & Furman, 1999). However resisted, in some respects reallocation of educational resources across school districts is parallel to financing a public good by taxing citizens in a graduated fashion according to differences in property or income.

It is assumed that the poor would benefit from a source of revenue which they did not directly generate. But why would wealthy citizens agree to tax themselves for the benefit of the less wealthy? What helps determine the willingness to be taxed for the benefit of someone else's children?³

As a human right, education is unique in that it is as much in the interest of the geographic periphery as the geographic center. Education investments made in rural Mississippi may have important and positive externalities in New York. Although New York has many priorities and demands on public expenditure, New Yorkers regularly tax themselves in order to support Head Start education in Mississippi. Why do they do this?

² Article 26 of the Universal Declaration of Human Rights, adopted on December 26, 1944, states that: 'everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages... and higher education shall be equally accessible on the basis of merit.'

³ One unique characteristic of education finance is the manner by which many American school districts rely on the assessment of property values for education revenue and by which the local taxpayers vote on those taxes. The outcome of these elections may depend, in part, on the perceived utility of the school system. With this localized source of revenue, voters may find it difficult to justify an increase in approving the taxation of themselves if part of their revenues are distributed to other districts.

Education investments are of value to both geographic donors and geographic consumers because the economic benefits accrue to both producers and consumers of a public good. Parents may think of schools as instruments to affect individual occupational life chances. In many low income countries the evidence of upward mobility through education has been dramatic (Heyneman, 1982, 2004).

Parental demand for educational opportunity, coupled with the economic and political obligation of state authorities to provide it, accounts for the recent expansion of formal schooling at levels unprecedented in human history. Since the end of WWII, universal primary enrolment has been achieved in 85 countries including most of Latin America, Europe, and Central Asia; much of Eastern Asia; and Iraq, Tunisia, Jordan, Algeria, Botswana, Gabon, Lesotho, South Africa, Swaziland, Togo, and Uganda (UNESCO, 2002, p. 46). About ten nations remain with gross enrolment rates at or below 70%,⁴ although there are many additional countries where recent data are not sufficient to determine enrolment rates.

An international standard has been established of having equal access to a basic education opportunity consisting of about nine grades. Approximately 20% of the age cohort between 18 and 22 today have an opportunity to attend some form of postsecondary education (World Bank, 2004). The unprecedented growth in access to schooling would suggest that we are living in a period of the largest educational opportunity in recorded history.

In spite of this universal growth in access, most countries fall short of the standard of universal completion of grade nine. But the reason these countries fall short has changed. In West and Central Africa and in South Asia about a third of the deficit from universal completion of grade nine can be attributed to 'dropouts'. In Central America and in Eastern and Southern Africa, about 70% of the deficit can be attributed to dropouts. In Europe and Central Asia dropouts constitute about 80% of the deficit, and in South America dropouts account for 92% of the deficit (Pritchett, 2004, p. 181). The main problem in basic education today is not lack of access, but rather the lack of progress through primary school once entry has been attained.

While there are some school systems which have been found to operate efficiently despite low levels of resources (Heyneman, 1997, 2004), it is also the case that differences in resources constitute the largest source of low achievement (Heyneman & Loxley, 1983). Because low achievement is a principal cause of dropouts, and because inequality of resources is a principal source of the achievement problem, it is reasonable to conclude that inequality in the distribution of resources is the principal cause of the inequality in educational results across countries.

But how unequal is the distribution of educational resources? Within the United States financial disparities among districts and states range from a ratio of 1:2 to perhaps as high as 1:5. For instance, in New York in 1995, per-pupil expenditures ranged from \$5,900-\$11,950, a difference of 1:2. In the same year, interstate differences ranged from a low of \$3,632 in Utah to a high of \$10,140 in New Jersey, a difference of 1:2.8. Within Illinois, however, the difference across school districts ranged from \$3,000-\$15,000, a difference of 1:5 (Hadderman, 2002).

It is difficult to calculate the same measures across countries. Purchasing power value differs between currencies. Salaries and wages are often not well recorded. Figures on government expenditures range in quality and in coverage. And international statistical agencies are only beginning to hold low income countries to the same standards of transparency and statistical professionalism in education that they expect in other fields such as health, trade, and public accounts (Heyneman, 1999).

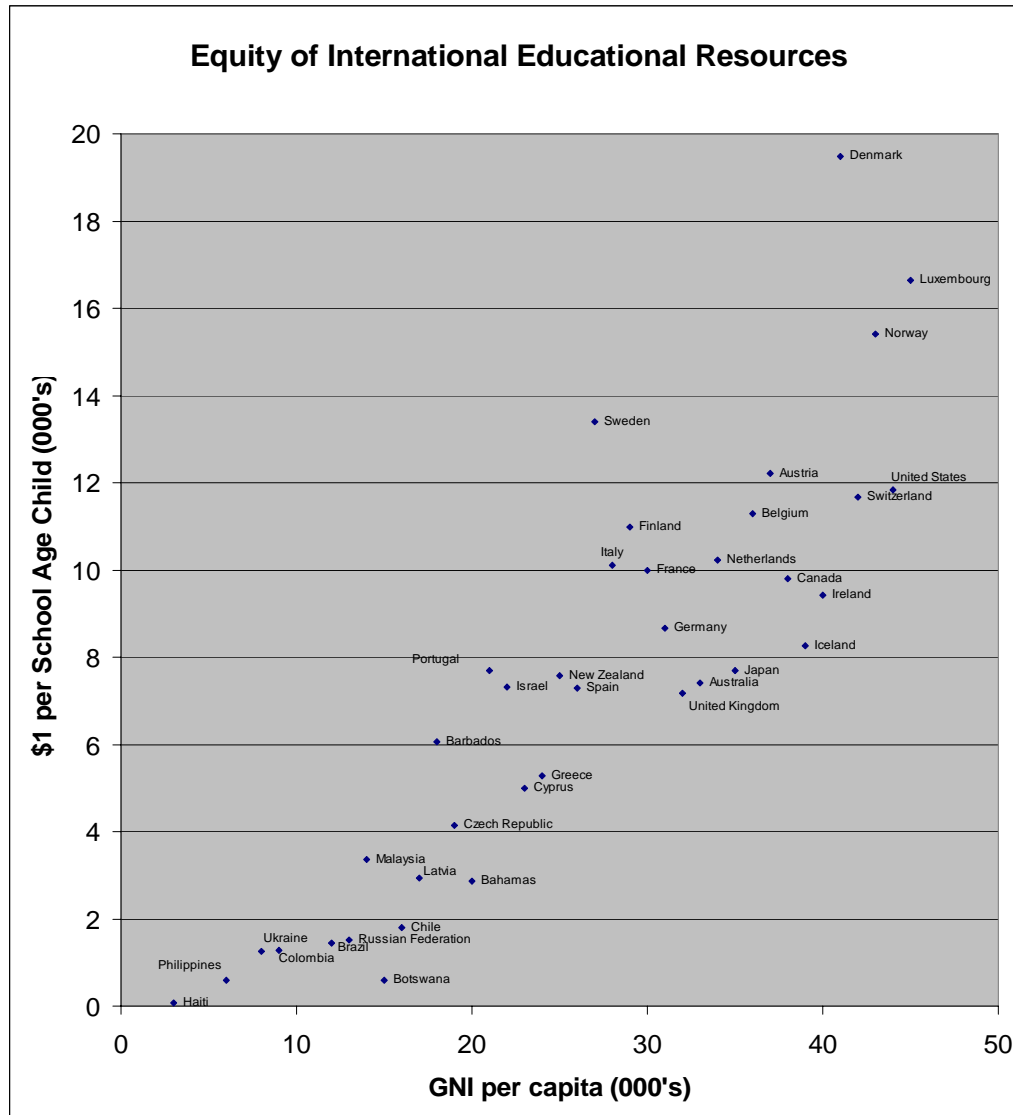
Nevertheless, recent efforts have made it possible to estimate expenditures using purchasing power parity in a sufficient variety of countries to give us a picture of the order of magnitude of the differences in educational opportunity. There is more variation between wealthy and impoverished areas of the world than there is between wealthy and impoverished regions within the U.S.

For each country for which we have reliable information, we have taken (i) the level of public expenditure on education as a percentage of GDP and (ii) the level of GDP expressed in terms of purchasing power parity (PPP). From these two figures we have calculated (iii) the money spent on education in U.S. dollars (US\$). We then took the population of school age children and divided that by educational expenditures to achieve (v) the expenditure for each school age person in each nation.

⁴ Angola, Burkina Faso, Burundi, Eritrea, Guinea, Niger, Sierra Leone, Tanzania, Djibouti, and the Sudan.

As one might expect, the very low income nations are able to allocate only a small fraction of what a high income country is able to allocate. Bangladesh spends about \$157 per school age person. This compares unfavourably with Angola which allocated \$209, Azerbaijan which allocated \$486, Brazil with \$1,450, South Africa with \$2,287, Bahrain with \$3,600, Spain with \$7,300, Germany with \$8,673, Canada with \$9,791, the Netherlands with \$10,233, Switzerland with \$11,658, Norway with \$15,409, and Denmark with \$19,468. These differences are illustrated by Figure 1.

Figure 1

**Sources:**

- 1) UNDP (2004), *Cultural Liberty in Today's Diverse World: Human Development Report*
- 2) UNESCO (2002), *Is the World on Track? Education For All Global Monitoring Report*

The International Search for Social Justice in Education

International legal structures to propose, negotiate, and ratify binding treaties are in place and are already operating in diverse fields of human rights such as ethnic cleansing, war crimes, narcotics, and involuntary servitude as well as in more technical areas such as nuclear disarmament and non-proliferation, transport safety, and telecommunications standards. The procedures of international law are implemented on a daily basis.

The United Nations Convention on the Rights of the Child, adopted in 1989, is the most widely ratified treaty in the world. Virtually all of the industrial democracies have signed this convention and their legislatures and parliaments have ratified it. All of them are required to submit reports every five years on what they are doing to make those rights effective (Melchiorre, 2002, p. 3). Article 28 of the Convention on the Rights of the Child includes the obligation of the state to:

1. Make primary education compulsory and available to all;
2. Encourage the development of different forms of secondary education, including general and vocational education, make them available and accessible to every child, and take appropriate measures, such as the introduction of free education and offering financial assistance in case of need;
3. Make higher education accessible to all on the basis of capacity by every appropriate means;⁵
4. Make educational and vocational information and guidance available and accessible to all children;
5. Take measures to encourage regular attendance at schools and the reduction of dropout rates;
6. Take all appropriate measures to ensure that school discipline is administered in a manner consistent with the child's human dignity;
7. Promote and encourage international cooperation in matters relating to education, in particular with a view to contributing to the elimination of ignorance and illiteracy throughout the world and facilitating access to scientific and technical knowledge and modern teaching methods.⁶ In this regard, particular account shall be taken of the needs of developing countries (reproduced in Melchiorre, 2002, p. 6 [emphasis added]).

What are the 'needs' of developing countries, and what does 'take into account' imply? Normally, the latter implies that the ability of a poor nation to adhere to rules and regulations is attenuated because of its poverty. It does not mean that poor countries have a right to abrogate their agreements. No country is excused from the prohibition on slavery on the grounds that it is poor. In essence, this phrase acknowledges that low income countries cannot be expected to enforce universal schooling agreements without assistance for education.

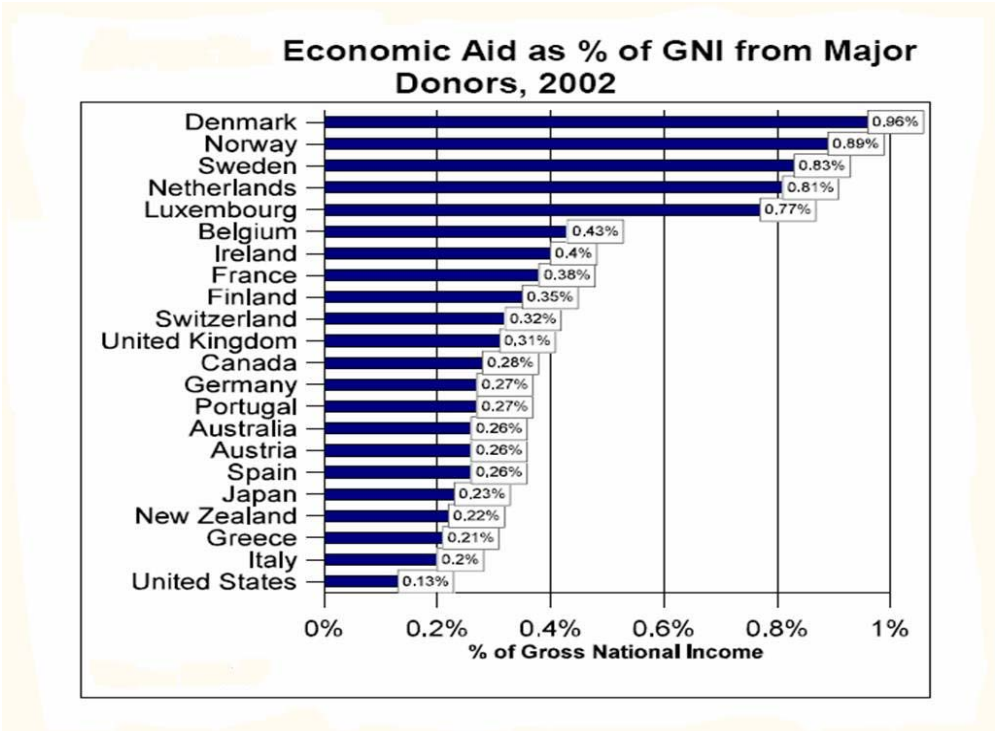
Since WWII, industrial democracies have allocated a proportion of their public finance as assistance to less wealthy nations, including their efforts to educate their citizens. This aid flows through private voluntary organizations such as CARE; through bilateral organizations such as USAID; and through multi-lateral organizations such as the World Bank and the regional development banks.

Industrial democracies have not legally obligated themselves to allocate a particular proportion of their wealth to foreign aid, but it is generally acknowledged that approximately one percent of GDP is a reasonable target. In the first years following WWII the United States was extraordinarily generous with its assistance, which in 1950 amounted to just under 3% of GDP. U.S. foreign aid dropped over the next 20 years. In 1997 it reached its lowest level ever at 0.16% of GDP, with the number of employees working for USAID dropping from 8,200 in 1962 to about 2,000 today (Tarnoff & Nowels, 2002, p. 15). In 2002 the U.S. ranked 22nd in its allocation of foreign aid (Figure 2).

⁵ Defined as intellectual ability.

⁶ Defined as being 'unschooled'.

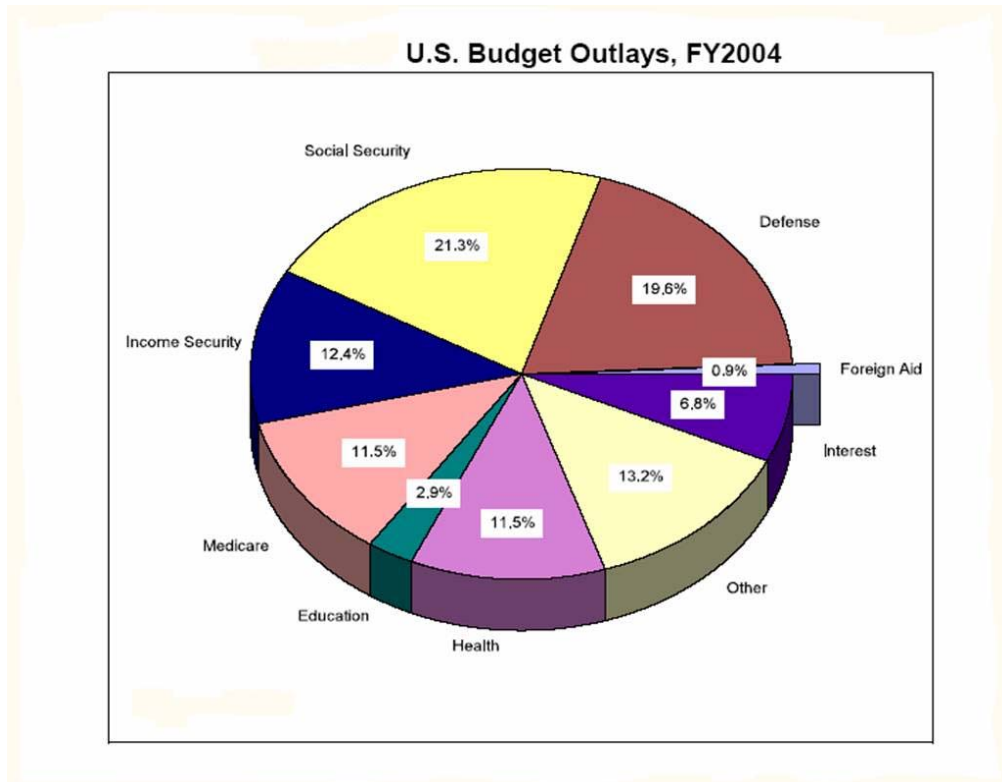
Figure 2



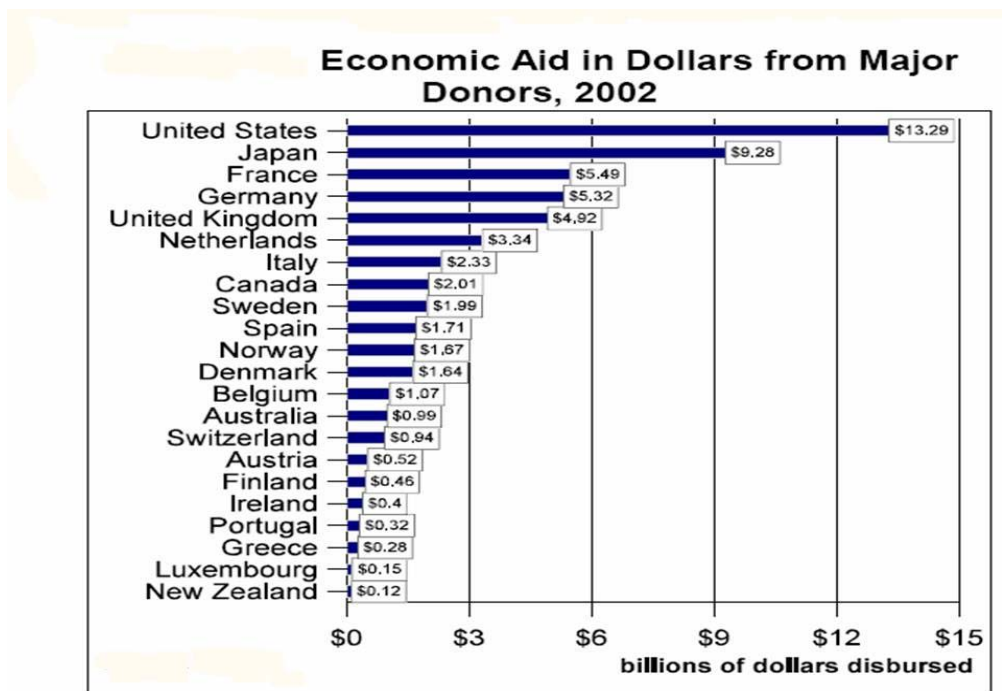
Source: Tarnoff, C. & Nowels, L. (2004), *Foreign aid: An introductory overview of U.S. programs and policy*, Congressional Research Service, Washington, D.C.

The U.S. economy is the world’s largest and though foreign aid in 2004 accounted for only 0.9% of federal government expenditures (Figure 3), the amount of aid in terms of dollars is still the world’s largest among the industrial democracies (Figure 4).

Figure 3



Source: Tarnoff, C. & Nowels, L. (2004), *Foreign aid: An introductory overview of U.S. programs and policy*, Congressional Research Service, Washington, D.C.



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The problem is not only that foreign aid is too small, but also that it is allocated to many priorities other than education. Only about one half of the U.S. foreign aid budget is allocated for purposes of economic development or humanitarian-based relief. The other half is allocated either to military purposes or to economic and political purposes. Military purposes accounted for 23% in 2004; economic and political and security purposes accounted for 26%.

Another handicap is the tendency to allocate foreign aid to a small number of strategically important countries. A significant portion of U.S. foreign aid is allocated to the Middle East, with Israel accounting for almost \$3 billion a year and Egypt about \$2 billion a year. Four recipients – Israel, Palestine, Egypt, and Jordan – accounted for about one half of all U.S. foreign assistance until recently.⁷ This has changed since 9/11 with the growth in assistance to Iraq, Afghanistan, and Central Asia, but the point is constant. Foreign aid from the U.S. to date has not been targeted primarily to humanitarian concerns or to education. Education accounts for about 6% of U.S. economic and social assistance, with assistance for basic education accounting for about 3.9% (Tarnoff & Nowels, 2002, p. 10).

Is the U.S. less concerned with education than other industrial democracies which have lower military and security concerns? Not exactly. Of all Official Development Assistance (ODA) in 2002, the total education assistance of US\$3.8 billion accounted for only a small portion of overall aid. Education assistance was only 8% of the total level of assistance to Eastern Europe, and in the region which arguably needs it most, sub-Saharan Africa, aid to education amounted to only 10% of the total aid allocation (OECD: Aid At a Glance by Region, 2002).

But foreign assistance is in fact only a small percentage of the total flow of capital to and from developing countries. In 2000, capital flows amounted to US\$463 billion (with US\$161 billion net inflow). Aid amounted to only 6.5% of this, and was dwarfed by the amount of capital flowing via foreign direct investment at 38.4% (Table 1).

Table 1. Capital Flows to Developing Countries in 2000⁸ (in US\$ Billions)

	E. Asia	ECA	LAC	MENA	S. Asia	SSA	Total	(% of Total)
Foreign Direct Investment	58	29	76	5	3	7	178	38.4%
Portfolio Equity	29	6	10	1	2	1	49	10.6%
Aid	3	8	3	3	3	10	30	6.5%
Remittances	2	6	15	12	18	2	55	11.9%
Debt Repayment	-33	-5	-47	-11	1	-6	-101	-21.8%
Profits on Foreign Investment	-17	-3	-22	-2	-1	-5	-50	-10.8%
Total (Net)							161	Positive
							463	Total Flow

* Developing countries = countries which are allowed to borrow from the Multilateral Development Banks. ECA = Europe and Central Asia region; MENA=Middle East and North Africa region; LAC= Latin America and the Caribbean region.

Source: World Bank (2001), *Global Development Finance 2001*, World Bank Bank, Washington, D.C.

There is no enforceable mandate for wealthy nations to share their resources to achieve a principle which they take as sacrosanct within their own countries. But there is a moral and an economic case for achieving a rough equality of educational access around the world. If this was accepted as an international responsibility, what would it cost?

The World Bank, UNICEF, and UNESCO have each done cost estimates. Because their assumptions differ, their estimates differ. UNESCO believes it would require additional resources of about US\$4.3

⁷ The new emphasis on Iraq will further raise the proportion of foreign aid allocated to the Middle East.

⁸ Developing countries defined as eligible to borrow from Multilateral Development Banks. The six regions in the table above are: E. Asia: East Asia; ECA: Europe and Central Asia; LAC: Latin America and the Caribbean; MENA: Middle East and North Africa; S. Asia: South Asia; SSA: Sub-Saharan Africa.

billion/year; UNICEF believes it would require about US\$4.9 billion; and the World Bank suggests that it would require about US\$8.4 billion (Table 2). The most important differences in these estimates derive from differences in unit expenditures (UNESCO assumes \$188 per student per year; UNICEF assumes \$42 per student) and whether the target outcome is enrolment or completion. The World Bank's estimate, for instance, is based on the proportion of children in the relevant age cohort able to complete primary education within the allotted time.

Table 2. Average Annual Cost to Achieve Universal Primary Education (UPE) by 2015 by Source of Estimate

Source	Cost (in billions of US \$)
UNESCO ^a	\$4.294
UNICEF ^b	\$4.939
World Bank ^c	\$8.357

The differences in unit costs are due to differences in a 'minimum' package of educational goods; differences in current costs are due to differences in assumptions over an appropriate teacher salary.

Source: UNESCO (2004), *Education for all: Is the world on track?*, UNESCO, Paris, p. 136

Estimates also differ in regards to potential additional resource sources. But all estimates assume that the resources would need to be derived from a mixture of external aid and internal savings and tax receipts, with the majority of the new resources coming from internal sources even for the 47 poorest countries of the world (Table 3).

Table 3. Annual Funding Requirements to Achieve Universal Primary Education (UPE) by 2015 (US\$ Billions)

	Source		
	Domestic	External	Total
47 Poorest Countries	4.1	2.1	6.1*
All Developing Countries	2.3	.3	2.6
Total	6.4	2.4	8.8

* Includes 0.6 billion to support AIDS orphans.

Source: World Bank, *Achieving education for all by 2015. Simulation results for 47 low-income countries*, World Bank, Washington, D.C., Table 4.13.

Whatever the outcome, it must be acknowledged that the highest of the three estimates of the additional external funds needed to achieve basic international equality of educational opportunity, US\$2.4 billion, is less than 1% of the flow of capital between low and high income countries and only 8% of the current flow of aid. If the cost is so low in comparison to the resources available, what are the prospects of establishing a new dimension of social justice in the field of education? In fact the prospects are quite good.

The New International Dimension of Social Justice in Education

There has been a great deal of discussion about the effectiveness of foreign aid. Some have argued that it has been ineffective because the aid has been targeted to comparatively wealthy countries with low need. Others have argued that aid was directed at countries whose economic policies were hopelessly mired in distortions (Dollar & Pritchett, 1998). Some have suggested that foreign aid has simply supplanted normal expenditures, allowing local governments to use aid to pay for expenditures they would have made anyway while shifting other funds to expenditures with little impact on poverty or the economy (Shantayanan, 1998). As in the domestic debate over social welfare, many have suggested that the agencies themselves should be restructured (International Financial Institutions Advisory Commission, 2000), and that aid might be better channeled through non-governmental organizations, including faith-based organizations.

On the other hand, foreign aid is being rethought. Some have suggested that there is a way to increase the certainty that aid will be devoted to its intended purposes and be effective. They propose a new form of aid, called the Millennium Challenge Account (MCA), which the U.S. Congress commissioned early in 2004.

^a 100% Net Enrolment Ratio (NER); projected unit cost \$198; current cost \$188.

^b 100% NER; projected unit cost \$140; current cost \$42.

^c 100% completion; projected unit cost \$79; current cost \$79.

The MCA is a commitment of the U.S. to raise its grant aid by a factor of 50% over the next three years and will result in a five billion dollar annual increase over current foreign aid levels (Heyneman, 2003). Many other countries and multinational development assistance agencies are being asked to co-finance this new account, and their participation would augment the original proposal from the U.S. The MCA offers the opportunity for a quantum change in the prospects for peace and stability. It will be allocated entirely to health and education. It will be targeted to nations which are poor and need it the most, and who have met the standards for macro-economic policy accountability and reform on the grounds that a nation which cannot put effective economic development policies in place will not be likely to use aid effectively (Burnside & Dollar, 1998).⁹ If aid is nested within nations with supportive economic and social principles, aid is expected to have its intended effect. But the purpose of aid is equally important.

Public aid is being targeted to support public functions and public goods in health and education on the grounds that it is morally right for children of all nations to have equal opportunity. Aid will support policies addressing health issues such as infectious disease, dangerous sexual practices, smoking, and the abuse of alcohol. In education, aid will lower (but hardly eliminate) the gap in per pupil expenditures. It will increase educational opportunity for girls and the availability of simple educational goods and services such as textbooks (Heyneman, forthcoming 2005).

Thus, the world is slowly but carefully edging toward a single minimum standard of education and social justice. While there is no legal mandate to transfer resources from wealthy to poor nations as there are to transfer resources from wealthy to poor school districts within the United States, the framework is in place to provide universal educational opportunity. This first step will likely lead to the consideration of a basic level of equality of opportunity across nations.

A broader question concerns the nature of charity: is it possible to have a charitable relationship without at the same time having expectations of behaviour? I think it is not possible. I believe that the relationship among nations is parallel to the relationship among individuals within countries. While the poor deserve assistance, that assistance obligates them. No nation, nor individual, has a right to misdirect philanthropy from a legitimate to an illegitimate purpose. The rights of the donor are important. They sacrifice on specific grounds – health, education, welfare, and the like – and would have the right to withdraw new funds if that charity were to be misused.

Withdrawal of welfare does not necessarily solve the problem of poverty, however, and families, like nations, may soon request a new round of ‘debt relief’, triggering questions from donors about how previous philanthropy was managed. It is a difficult question, and one which has no single response. There are rights and obligations on both sides. The key underpinning assumption, however, is the perception that children, whether in Michigan or Malawi, deserve the same opportunity to attend school and to learn what the world offers.

⁹ Macro-economic accountability might include a ceiling on deficit financing, open trade policy, exchangeable currency, adherence to transparency standards in public accounting, etc.

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