

**Part I**

**Universal Primary Education:  
Historical and Theoretical Perspectives**

## Chapter 1

### Political Economy of Universalization in Primary Education

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#### Summary

This chapter deals with the worldwide historical evolution of modern primary education. The current international state of affairs is also discussed based upon the historical analyses. The foundation and the development of modern formal education systems were conducted as state enterprises but financed mainly by the community or families for a long time. The universalization of primary education in accordance with the idea of education as a human right was delayed. Sufficient governmental subsidies to support it were realized in the 20<sup>th</sup> century in the processes of forming the welfare states. However, recently, the images of the welfare states and the conventional forms of formal primary education as being led by the state have begun to change. In the meantime, developing countries implemented the systems that evolved in developed countries, thus, their primary education systems had, from the beginning, a tendency towards being spearheaded by the state, including the financial aspects. However, this total dependency upon the state found itself in serious straits in 1980s when the international economic recession, which shrank the governments' budgets in general, and particularly in educational items, began. Recently, the skepticism and reconsideration about having the state lead the education system, which have appeared in the developed countries, have been influencing educational policies in developing countries. This has been bringing about confusion and complicated factors with respect to the enterprise of the universalization of primary education because the universalization of primary education inherently has orientation towards universality which requires the government to take the necessary proper role in its evolution.

#### Key words

political economy approach, primary education development

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The universalization of primary education in the developing countries is at first glance an obvious policy goal, and its task is generally considered to reproduce in developing countries the “public education” model that has been completed in advanced countries. However, contemporary public education in advanced countries has been formed through various conflicts, including diversity in the processes, and modern public education itself has been recently criticized. Trying to apply a simple public education model to developing countries by ignoring historical processes has probably been producing confusion in discussions on education in the developing countries and has consequently created a stagnation of the reality. This paper first organizes the points of argument concerning discussion on the universalization of primary education in developing countries (first section). It then describes the formation of modern nations in Western Europe and the structure there of the universalization of primary education (second section) and analyzes the processes involved and problems faced in transferring the primary education system to developing countries (third section).

## **1. Highlights of the argument for primary education and its development**

The universalization of primary education is considered a universal policy objective whose value on one hand is obvious to everyone, but on the other the idea and method in fact include complicated problems. The main points of argument are organized as follows:

### **1.1. Positioning of primary education in economic development**

There are two basic ways of thinking in regard to the positioning of primary education in economic development.

#### **Education as a universal human right**

One way is that primary education is the basic condition for humans to live as humans, and it is therefore considered to be one corollary of the right to live. “The Basic Human Needs” (BHN) of the economic assistance theory in the 1970s positioned such elements as nutritious and health conditions as the objects of this kind of assistance. The

fulfillment of BHN is the primary objective of economic development and the basic criteria of assistance to developing countries. It is possible to include basic education in such needs and to discuss them. But if biological survival becomes the only issue, basic education does not necessarily have high priority from the standpoint of its vital importance.

In contrast, providing education itself becomes an achievement goal of the development because education becomes an important element of welfare from the viewpoint of “freedom” in a broad sense described by Sen (1999). “When discussing the development in a narrow sense such as growth of GNP (Gross National Product) and industrialization,” wrote Sen, “a question is often asked if certain kinds of political social freedoms such as political participation, freedom to disagree, and opportunities to receive the basic education will ‘contribute to the development.’ In the light of the basic viewpoint of the development as the freedoms, asking such a question tends to make people lose sight of an important understanding that these essential freedoms (that is, freedom of political participation, the opportunities to receive the basic education and medical care and so forth) are included in the elements of the development itself” (op. cit., p. 3). However, the discussion has a great constraint of being unable to provide sufficient basis for attaching relative priority to primary education in developing countries, where resources are limited, and under conditions where various basic needs are unfulfilled.

### **Education as an investment**

Another way of thinking emphasizes the usefulness of primary education in economic development. From this viewpoint, the diffusion of primary education is an investment for socioeconomic development, and its returns will be collected in the future by a realization of economic development. Since this positioning places primary education in the same rank of investments in other economic sectors, a distribution of resources to education is justified by comparing the efficiency of educational investments with those of other investments.

The “educational investment theory” or the “human capital theory” in economics first started in the 1950s when the macroscopic efficiency of educational investment was questioned. The discussion developed by T. W. Schultz and others emphasized the character of education as an investment by measuring human investments as material resources and by calculating contributions to economic growth by using a macro production function or growth accounting method. Moreover, micro human capitals

have been developed by G. Becker and others since the 1960s. This method clarified an analytical meaning of measuring a relationship between investments for an individual's education and the subsequent increases in productivity by using the "internal return rates" of educational investments as the media, and it forms the basis for subsequent educational economics.

Based on this, the calculations of internal return rates are carried out in many countries. The policy meaning was large, which was shown, for example, by an education sector paper of the World Bank (1995) organizing internal return rates calculated per educational class, finding out that the social profit rate of elementary education was the highest in general, and, based mainly on this finding, describing that the diffusion of elementary education is the priority task in the strategies of development implemented in developing countries.

However, there are various criticisms for the analysis based on internal return rates. The most fundamental one questions that the calculations deal only with the economic contributions of education and do not include the education of wider social or humanitarian fields in the objectives. Let's call this "the economic factor constraint." Even though the question is limited to economic viewpoints, wage differences per educational background that becomes the basis for calculating the internal return rates do not necessarily show the differences in labor productivity as they are. Between the two, there intervene various factors such as the demand conditions of labor markets and the employment practices of companies. The "screening" hypothesis also became a strong criticism, asserting that the wage differences obtained by completing superior educational stages in particular are created not because the increases of intellectual skills resulting from education have values, but because a certain quality was clearly shown through the selections in the process of educational advancement. Let's call the problem related to this "the wage index constraint." Furthermore, the internal income rates are calculated by so-called cross-sectional wage profiles per academic background and per age obtained from the present labor force statistics at one time. Wages that will be gained in reality by the population that received education at present will change naturally, influenced by the demands and supplies of the population per academic background in the future. Therefore the internal return rates in this sense do not correctly predict the investment returns in the present education. I call this "the time constraint."

Still, the above constraints of economic factors are criticized because the limits are generally giving downward bias regarding social welfare improvement brought on by education. However, to put it another way, it can be said that the internal return rates

are the most moderately estimated index from the viewpoint of social welfare improvement. Since the profits of educational investments are superior in total, they are justified, at least when the internal return rates are larger than the return rates of general investments. However, it has been pointed out that the constraint of the wage index is generally its tendency to exaggerate its evaluation of educational investments. Regarding the time constraint, it is thought that the return rates tend to decline gradually because it is predicted that education generally expands in the process of modernization. Moreover, when the international comparison among advanced countries is reviewed, it is observed that the return rates of education gradually decrease according to development. Therefore the factors related to the time constraint generally tend to create a bias toward an overestimation of returns that are actually expected in the future. Because of this factor, the estimated values of the return rates include positive or negative biases in comparison to the proper values, and policy judgment based on them could include a considerably large error.

Besides the conventional criticism, I think that analyses centering on the return rates have a serious limitation concerning the evaluation of the universalization of primary education in particular. >From the viewpoint of the estimated examples of internal return rates, those of primary education are notably higher in low-income countries, such as Africa. This is because in these countries primary education is evaluated as an educational background, and in former colonial countries an ability to use a suzerain country's language acquired in an elementary school leads to paid jobs at certain white-collar occupations. Meanwhile, almost all people without a primary education are peasants at self-sufficient stages, and their incomes evaluated by cash are extremely low. Therefore the estimated return rates are very high. However, the return rates of primary education instead decline as the developing countries move up the economic development stages. At the stage where school enrollment rates exceed 90%, in particular, children who received a primary education will mostly become peasants, and this does not lead to visible cash income, even though the education has an effect of increasing the peasants' productivity. As described later, primary education has a meaning as a social investment by saturation, but it is thought that the return rates measured by the ordinary calculation methods would decline at least at the stage nearing saturation. In this sense, the analyses based on internal return rates are actually ineffective for discussion regarding the universalization of primary education.

In this sense, the economic development in Japan, South Korea, Taiwan, and other East Asian countries attracted an interest (World Bank, 1993). It is emphasized there that

a large amount of educational investments were made in these countries and greatly influenced their rapid growth. The report attempts to demonstratively show this by basically measuring the above-mentioned macro production functions as the media. It emphasizes that Kuznets' hypothesis asserting that rapid economic growth would bring about temporary deterioration of income distribution was not applied to these countries. From this point, it emphasized that the investments in human capital would not only contribute to growth, but would also bring about equality in the development process.

However, there is serious criticism of the discussion. R. P. Dore, a socialist, by citing such examples as Japan in particular in his book *The Diploma Disease*, argued that the countries that started modernization after the West European countries introduced an educational system as part of the system of a modern society, but there were excessive demands for educational advancement because the acquisition of academic backgrounds leads to modern occupations. Consequently, excessive competition to acquire academic backgrounds is produced. Since employers hire workers with high educational backgrounds regardless of necessary knowledge, the competition for acquiring one intensifies. Dore (1973) called this "the Diploma Disease." >From that viewpoint, the East Asian societies are rather supposed to be regarded as examples created by excessive educational investments. In reality, Japan and South Korea have lower return rates of education in comparison to those of the United States and European countries.

Such criticisms have been accepted with wide sympathy in Japan, for example. The Japanese society shares the discussion, asserting that excessive emphasis on school education produces overconfidence in academic backgrounds, leading to extreme competition in entrance exams and distorting the education itself. However, society widely shares the feeling that Japan was able to catch up with the West European countries despite its poor natural resources, a result of the diffusion of education. International cooperation in terms of education is emphasized from this point of view. It can be said that the characteristic way of thinking by most Japanese regarding education is that in this form, a sort of ambivalence exists in the relationship between modernization and education. In any event, further discussion is needed in regard to Japan's experiences.

## **1.2. Organizing public education**

The second dimension concerns problems of actors that support basic education.

## **Role of the central government**

Regarding education in developing countries, the mainstream viewpoint is that roles of the central governments would be considered important. If the aim is to “develop” the countries whose autonomous socioeconomic development has lagged behind in the first place, it is to be expected that the states or central governments are emphasized. Moreover, in international environments, the states first recognize the necessity and procure resources, and this leads to actual development in the regions; that is, the so-called top-down idea becomes the basis.

In reality, “Karachi Plan” of 1964, which talked about the universalization of primary education in the developing countries as an international task for the first time World War II, had an implicit assumption that the states would basically play a central role in expanding and improving primary education and that they could achieve the realization. The backgrounds were that in this stage, the influence of socialist countries was strong, and the central governments were expected to carry out welfare state policies even in capitalist states.

There was a strong tendency asserting that the expansion of primary education should mainly be carried out by the central governments in the subsequent development of developing countries. This has two important factors. First, initiatives for the expansion of primary education did not necessarily exist sufficiently at local levels, and they required political commitment of the central governments. The rich persons in city areas, for example, in general organized their own schools or let their children go to schools established by foreign missions. In contrast, poor persons in city or rural areas lacked the political organizational ability to carry out education with their own hands. This tendency is especially strong in such regions as Africa where ethnic diversity is high and where each ethnic group lacks a long-term development perspective.

Another factor is related to finance. The formation and operation of school systems in general require enormous financial resources in societies whose economic development level is low. The construction of school buildings and the employment of a teaching staff need cash financing, and it is difficult to collect cash from residents in rural societies with low production levels. Public-sector financial sources in many developing countries generally rely on the production or export of primary goods, such as agricultural and mining products. These sources are basically controlled by central governments. Assistance from foreign countries is also basically controlled by central governments. Such matters relatively strengthen the power of the central governments in terms of finance.



## **Community and movement**

Nevertheless, there has also been a deep-rooted way of thinking asserting that roles of the local governments or regional communities should be emphasized in the expansion of basic education in developing countries. In reality, the actual expansion of basic education starts with regional activities because elementary schools are regional institutions.

One trend of such movements is basic education programs in the regional development movements. Movements of this kind that became pioneers were, for example, those in such countries as Pakistan. Since the 1980s, they have been carried out by foreign organizations such as NPOs (nonprofit organizations) or NGOs (nongovernmental organizations) and have expanded, together with increases of ideologies regarding volunteer nongovernmental organizations carrying out public activities in the advanced countries, described later, and an increasing number have similar educational programs at the primary education stage. There is an increasing tendency for international organizations and aid agencies to incorporate such activities in their aid implementation systems. The on-site NGOs have large organizations in such countries as India and Pakistan in particular, and there are many examples where they have become the cores of community development as well as the media of international assistance (Nakashiba, 2004).

Another trend is so-called “school movements,” in South American countries in particular. They have a sort of social movement ideology as their core, represented by Paulo Flora, and have developed as civil movements of constructing and operating autonomous schools. Escuela Nueva (new school), for example, can be considered as one of those movements, which exerted great influence over the discussion regarding education in the developing countries by building schools close to the regional needs by giving autonomy to teachers.

Since the 1980s, some international organizations have become inclined to emphasize the importance of expanding schools’ discretion as well as the importance of regional supports to schools. The above-mentioned educational World Bank paper, for example, asserts the importance of the participation of regional communities and of parents in school operations, in addition to the importance of financial contributions (World Bank, 1995). It can be said that orientation has become an important orientation of educational assistance after the 1990s.

### **1.3. Educational Practices**

The third dimension is related to problems concerning school organizations, teaching staff, educational conditions, and educational contents and methods.

#### **Emphasis on standard**

First is the standpoint that emphasizes the achievement of a certain standard in basic education. It is considered that primary education in general not only remains the most basic educational stage, but it also forms intellectual attitudes that people in one state should possess as the “national education.” To realize this, a certain standard level should be achieved in educational contents and methods, in the school organizations supporting these matters, and so on. In this sense, the primary education systems in the developing countries can be described as the modern social systems that are introduced nationally at first.

As the corollary, it is requested in terms of policies that the educational contents and methods as well as the school organizations should be achieved based on national standards. Moreover, the contents of the basic education are formed by organizing “school curricula,” by abstractly systematizing knowledge skills needed in societies and by arranging them according to the developmental stages of students from the lower to the higher grades. Such curricula are formed by spending long times in carrying out logical tasks and in receiving feedback from actual educational activities. The developing countries cannot sufficiently go through such processes, so they need to introduce the curricula of advanced countries. In the former colonial countries in particular, the suzerain curricula have strong influences, and rearranging them is difficult.

Furthermore, in many developing countries primary education itself has value as an academic background because not all people complete it. Under these conditions, primary education fulfills the function of social selections, and the demanding of certain strict conditions of graduation has a meaning. Moreover, teachers are given social authority as guardians of the social selections and tend to strictly apply certain standards.

Furthermore, under conditions in which education is given insufficient resources, it is impossible to avoid large class scales or low-level training of teachers. Under these conditions, it is imperative that authoritative class operations be carried out according to certain standards. The classes are to be given only to students who can adapt to them. In addition, at the time of the class advancement, reviews are carried out according to the

requirements of academic levels and attendance records, and students fail if they do not meet them. Orientation can be shown in the maintenance of educational conditions. For example, the achievement of certain levels concerning school buildings is strongly requested. In particular, a certain quality is asked of schools receiving foreign assistance. Consequently the unit cost becomes high.

### **Necessity of adaptation**

The above-mentioned standard orientation, on the one hand, leads to the maintenance of the quality of primary education, but on the other hand, the strict application functions in the direction of limiting the diffusion of primary education in the conditions of the developing countries. In comparison, there were strong demands for emphases on students, families, and regional factors.

At first, these have historically appeared as problems of teaching languages. In the developing countries in general, there are few instances where the common language called “the national language” is widespread. In the former colonies, their suzerain country’s language, such as English or French, is used as their teaching language. Or there are situations where a certain language is chosen to be a national language as a lingua franca and is used as a teaching language. However, in many cases at home students use their language, which is different. When the teaching language differs from the languages that students are using on a daily basis, it becomes a serious hindrance to the students’ learning. In particular, primary education means that children who are surrounded by human relations called a family will then move to social environments that are regulated institutionally, and the language differences will produce a strong negative incentive. To remove the obstacles, attempts to choose a life language as a teaching language or to move to a national language gradually, step by step, according to academic years, have been carried out in various forms in some countries.

Furthermore, the importance of an educational method emphasizing an individual student’s initiative has been pointed out since the 1980s. This is influenced strongly by postwar educational reforms in the advanced countries, as described later, but the method also apparently reflects that the above-mentioned standardization orientation does not fit the actual education.

Such movements appeared in the discussion regarding educational inputs. The standard orientation generally produces the tendency to request that visible educational conditions should be arranged while they adhere to the advanced countries’ standards. But educational conditions that the governments cannot directly control are not

emphasized. For example, the number of pupils per class and observation of the curricula are emphasized, though materials such as texts that the students should prepare are not. Consequently, a rote-learning type of educational method becomes dominant; that is, teachers write certain educational contents on blackboards, let students recite the contents with one voice, then let the students write the contents.

Contrary to this, attempts have been carried out, taking the concept of the Educational Production Function as the theoretical core, to achieve the largest effects by using limited resources, that is, to flexibly decide the combinations of educational inputs to maximize student attendance rates or academic results (Cohn, 1979; Psacharopoulos and Woodhall, 1985). For example, it was shown that productivity was higher when textbooks were distributed to all students without fail, rather than when resources were distributed to decrease the number of students per class (and to increase the number of teachers). Based on this and starting in the Philippines, assistance was provided for textbook publications and achieved good results. This is considered one successful example of education assistance.

Another more important problem is one related to the application of strict educational levels. Generally, in developing countries that have strict constraints of resources directed at education, the standard orientation was obliged to function in the direction of limiting educational opportunities. In the so-called least-developed countries such as those in Africa, as long as they maintain certain levels, limitations are produced in school accommodations, and conditions where applicants for admission cannot enter schools are also produced. That is, conditions of short supplies are produced.

In comparison to this, especially since the Jomtien conference in the 1990s, the universalization of basic education has become an international goal, so international organizations have started focusing on quantitative goals. It has been seen that in responding to the assistant policy change, and rather than applying the standard, some countries have moved their policy focus to the expansion of the number of accommodations. For example, in East Africa, the standard orientation is still strong in such countries as Tanzania, Mozambique, Rwanda, and Zambia, but since the end of the 1990s, Uganda's policy has been to accept the admissions of applicants without setting constraints.

#### **1.4. The two orientations**

More generally, the differences of orientations in the three axes described above can be summarized as shown in Table 1.

Table 1: The orientation patterns concerning primary education expansion

| Dimension                             | I The universalization orientation | II The selection orientation        |
|---------------------------------------|------------------------------------|-------------------------------------|
| The basis for ideas and justification | Human rights and obligations       | Investments and profits             |
| Actors of supplies                    | Central governments                | Regions and voluntary organizations |
| Organizations, contents, and methods  | Observance of standards            | Adaptation to needs                 |

The table organizes the two policy alternative orientations in the above-mentioned three axes. In the first axis, the idea of primary education is considered the guarantee of basic human rights on the one hand, so the idea of primary education has significance in universalization. On the other, there is a way of thinking that considers primary education the social or individual investment. The second axis is related to the actors implementing primary education. On one hand, that is each state's responsibility and should be formed and maintained by the state. On the other hand, the roles of the actors of supplies are rather played by regional or volunteer organizations. The third axis is related to the educational organizations, contents, and methods. At one pole, complying with certain levels decided by the governments is emphasized in primary education. At another pole is the standpoint that emphasizes corrections of those levels by adapting to the actual circumstances of students or regions.

## **2 The modern societies and school education**

The selections in the above-mentioned three dimensions, at a glance, seem to be unrelated to the education of the advanced countries. However, that is incorrect in a double sense because the options were in fact important when the modern states and school education systems were established. Furthermore, in various forms they are related to the discussion regarding educational policies in the present advanced countries, and they influence the present developing countries through trends of

researches or policies in the advanced countries.

## **2.1. The modern states and basic education**

### **Premodern education**

First, certain basic education was carried out even in the premodern West European societies. However, it was basically because certain benefits such as a fostering of religious morals were expected by families. Concerning educational opportunities, the wealthy class provided education by hiring private teachers. Most other city residents or peasants went to schools in churches, and their parents paid the tuition fees of the teaching staffs. Moreover, the educational contents usually centered on religious issues such as a bible, and by using them as the media, reading, writing, and arithmetic were learned, but the contents were rich in variety. Above all, there was a group of children at school, but learning was not something done as a group; the individual students basically learned by themselves, and teachers occasionally helped the students. The concept of grades did not exist, and very few students who reached a certain level advanced to secondary schools. In this sense it can be said that premodern education was inclined toward a selected orientation.

### **The modern public education – the establishment of national education**

The directions of education largely changed in the process when modern states were generally established in the latter half of the 18th century. In other words, one indispensable component for the establishment of modern states was that systematic modern basic education was established as “the national education.”

That appeared at the level of idea, and it was universality that constituted the foundation. Condorcet’s educational reform plan (*Condorcet*, translated by Sakagami in 2001) during the French Revolution at the end of the 18th century, which was said to become the source of the basic framework of the modern educational system, proposed a four-stage “national education” system and asserted that the people as a whole were supposed to attend school concerning the basic education sector. “In this way, education should be universal, that is, should be spread to all citizens. Education should be totally given on an equal basis as long as it is permitted by inevitable limits of costs, distribution conditions of the population, and children’s time usable for education” (*Condorcet*, op. cit., p. 15). Moreover, it emphasized that basic education was fundamentally the people’s proper right and that the universalization of school enrollment would benefit society at

the same time.

However, there was a standpoint emphasizing that education basically would benefit each national, and as long as this is so, it would be a matter of the individual's choice. In England especially, the wealthy class originally had developed the proper school systems that were spread throughout a considerable part of the population along with economic development resulting from the industrial revolution since the end of the 18th century. West (1965) pointed out that even though the obligatory educational system had not yet been established as described later, primary education would become universal by the mid-19th century. In England, the social benefits of universalizing primary education rather emerged from another source. Adam Smith, so-called the first person to analyze education from the viewpoint of economics, described concerning the necessity of primary education that education would be necessary to recover humanity because under the perfect divisions of labor, people would become engaged in simple labor (for example, creating nail heads). In reality, child labor was generalized in the working class as a result of the industrial revolution, which produced crime and humanitarian problems, and primary education was about to become the method of responding to such harmful effects. Subsequently, the tendency to position primary education as so-called security measures continued.

### **The nation-states as the actors**

It would be natural that the “nation-states” were positioned as the actors responsible for education in the modern societies. The national education would form the modern states, and the latter would manage and maintain the former. This thought was particularly strong in such countries as Prussia that aimed at forming modern societies by taking the states as their core. “Since the civil societies have the character of the universal families, the societies, concerning education in particular, as long as it is related to capacity to become a societal member, have obligations and rights to supervise and to influence the education by excluding parents' arbitrariness and contingency” (Hegel, translated by Fujino and Akazawa in 2001, II, p. 192). In France, where the civil revolution is also based on depriving the ancient regime of authority, it was apparent that the nation-state would be responsible for education from the viewpoint of depriving Catholic churches of authority, especially concerning basic education. However, as seen in the above-mentioned Condorcet reform plan, it was regarded watchfully that education might be influenced by political disturbances of the moment. The orientation led to Napoleon's educational reform, forming national education as its own national

system. Moreover, schools were also supposed to be arranged universally. “One school and one teacher would be arranged for each community of 400 people.” (Condorcet, p. 26). In any event, the relationship between regions and basic education were not positioned strongly at this point. “It would be dangerous to renounce the supervision of primary education because there would be a danger that primary education, given the fact that knowledge was not so widespread, would be harmed by biases or by exaggerated childish hate of biases.” (Condorcet, *op. cit.*, p. 66)

However, it was not apparent that central governments would undertake all the authorities and obligations concerning national education. In France and Germany, separately from the above-mentioned ideal, the state finances were weak; these nations spent most of their capacity for military and lacked the capacity to completely support public education, which was the national system. In reality, elementary schools were not constructed for everyone for a long time, and if schools were constructed, the teachers’ wages and other costs were shouldered by villages’ primitive tax systems.

Moreover, in England there was strong resistance to incorporation of the population in a uniform system because there was traditionally dominant discussion casting quite watchful eyes toward a king or a government imposing certain obligations on the public in general. The thought of liberalism continued to be asserted strongly in terms of education. In particular, the primary education for urban workers would be expanded in the 19th century, and it was carried out through Local Education Authorities installed in the regions. The finance did not rely on general governmental financial sources, but purpose taxes such as the liquor tax were applied to this. In the United States, primary education was emphasized as a result of Puritanism tradition, but that was basically maintained and managed by colonial communities, and each region eventually established such a system as the territories and population expanded. Then a prototype of the present system was established in which “school districts,” independently from the regional governments, maintained and managed the schools by receiving their own financial sources, such as the fixed property tax.

Nevertheless, modern public education belonged to the modern states in terms of idea, and the financial foundation supporting this was supported mostly by the villages or regional organizations; therefore, it took a long time to diffuse the idea of modern public education nationally and completely.

### **The modern school organizations and educational curricula**

It was natural that modern schools had a strong standardization vector concerning



educational organizations, contents, and so forth. The presence of universal knowledge as one core of the ideal of modern states became, as it is, the idea of primary education as shown clearly by words, “the basic knowledge list – the basic knowledge list that is needed to be provided to everyone and that can be acquired by everyone...” (Condorcet, op. cit., p. 21). In addition, such knowledge<sup>1</sup> “will be distributed among four grades. Each grade shall be completed by children with normal capacity in one year” (Condorcet, op. cit., p. 17). The concept of the four grades exerted great influence thereafter as well, and there were many countries that regarded basic primary education as the four grades until the stage of post-World War II. Modern primary education, that is, the academically composed standard “school course” system and its placement of the timewise curricula lasting for almost four years was envisaged in this way.

At the same time, this stage saw technological innovation, which was important to primary education. It was the spread of “en masse classes.” Teachers had originally dealt with each child at the initial stage of education in the premodern era, and the form of “lectures,” where one teacher would talk about certain subjects to students as a group, was limited to higher educational stages. It is said that it was in England during the industrial revolution that this form at the primary education stage began to be seen. It was a so-called typical modern product that realized educational efficiency by incorporating such modern systems as the educational curricula with certain contents, the controls provided by teachers, and the organization of students into the primary education system.

However, it’s true that the orientation toward standardization involves various contradictions. The problem has appeared since Rousseau offered this thought about 30 years after the French Revolution: academic logics and knowledge system composed inductively from social and moral demands would not necessarily and basically conform to children’s own developmental logics. This has repeatedly become a theme of educational reforms until today as the fundamental problem of basic education. More practically, however, the educational contents should always be limited to the minimum under circumstances where financial conditions would not be sufficiently guaranteed. These circumstances could be seen in France after the French Revolution and even in

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<sup>1</sup> “Reading and writing – these naturally require some grammatical knowledge – are taught. In addition to them, four rules of arithmetic, easy methods of measuring correctly lands and buildings, elementary explanations about local products as well as agricultural and industrial techniques, explanations of basic ethical concepts and of norms of actions drawn from the concepts, and finally, explanations of the principles of the social order within the limits of children’s understanding, will be added” (Condorcet, translated by Sakamoto, 2002, pp. 16-17).

Germany. The efficiency was advanced in the above-mentioned form in England and in the United States, but the educational contents were quite various.

The above described that modern public education was basically established by using the vector of the universalization orientation. Moreover, it also appeared most typically in primary education. However, it should also be noted that in it the selection orientation was not totally overcome.

## **2.2. The welfare states and the universalization of primary education**

The primary education that was formed in this way, however, did not subsume society as a whole as quickly as the idea requested. In France, the Condorcet reform plan was abandoned once, but it was realized as the national educational system under the Napoleon imperial regime while, to some degree, its form was being changed. In it, the school enrollment obligation was imposed regarding primary education, but the actual school enrollment rate did not necessarily increase until the latter half of the 19th century. It is said that Prussia organized the “obligatory education” legal system most quickly, but the enrollment rate also remained low until the latter half of the 19th century. As for England, it reached a considerably high level by the mid-19th century, but it was not until 1870 that the actual obligatory education was stipulated legally (West, op. cit.).

Primary education was actually universalized from the end of the 19th century to the beginning of the 20th when some countries moved to the welfare states. In reality, establishing the obligatory systems of social security and primary education were the prominent milestones on the movement toward the welfare states of West European societies (Flora, 1987). The welfare states realized the modern state agenda by intervening in children’s growth (obligatory education) and in individual lives (social security), both of which had been placed outside state interventions before. At the same time, in the welfare states, primary education was integrated with secondary education, then with higher education as one educational system for the first time, and it was positioned as part of the system. It can be said that the universalization of primary education was promoted further.

This appeared in changes especially in terms of finance. Particularly in England, the central government started financial supports before or after World War I, but until then the local education authorities had operated the primary education system by acquiring its own financial sources along with tuitions. In the United States, the state governments started providing equalization subsidies for local educational committees

by using various formulas (subsidy calculation criteria) (Benson, 1968). In these forms, the central governments at this point started intervening financially in primary education for the first time.

The standardization was advanced during this stage also in terms of the educational contents. On the one hand, this reflected the trend that national standardization became necessary as human movements intensified along with economic development. The more important factors were that secondary and higher education were expanded, that consistency of the educational system became necessary, and that demands for certain educational contents started as requirements to advance to higher schools.

Even in this stage, however, I wish to note that selection orientation was not overcome completely. In the United States and England, the management and maintenance of primary education continued to be regarded as the responsibility of regional communities. In the United States since the end of the 19th century, “progressive education” emphasizing children’s autonomous development and educational functions inherent in the regions have been proposed by people, including John Dewey as the key person, and have exerted great influence. Until now this thought has remained as the strong trend.

### **2.3. The changes of the primary education model of advanced countries**

As described above, it was after World War I that primary education in European countries and the United States was tentatively completed, and it was considered that the complete universalization of primary education was achieved during that time (Flora, op. cit.). At the same time, this was the stage when an expansion of secondary education was carried out in these countries, and, as described later, Japan also joined the trend. After World War II, further expansion of late secondary education and also of higher education was carried out as the 20th century ended. In this sense, the 20th century was the stage of educational expansion in the European countries and the United States, and also in Japan, which eventually joined the advanced countries.

On the other side of the coin, however, criticism toward educational expansion began to appear in various forms during the latter half of the 20th century. One manifestation was “diplomaism criticism.” This typically has exerted strong influence in Japan (Dore, 1972). Furthermore, the “world system” theory or “core-peripheral” theory criticized that as a result of modern systems or ideologies in West European countries

influencing the contemporary developing countries, education in the latter was expanding with little or no relation to inherent social demands. It can be said that both criticisms lead to a tone of argument asserting that the educational systems are expanding autonomously, are out of touch with inherent social or individual demands, and are in fact repressing individuals.

The discussion is not limited to education. Criticism toward the modern era itself, including social systems and cultures, has had strong influence since the 1970s. It is so-called postmodernism. It can be said, though only generally, that the criticism is aimed at newly questioning (deconstructing) the fact that modern societies demand social organizations from humans and that the states are acting by intervening in individual private lives. From this viewpoint, children's education was the very symbol, and in this sense, the spread of primary education was criticized from a critical viewpoint. A pioneer of such movements can be seen, for example, in Illich's "deschooling theory." Moreover, it can be said that this tone of argument occupied the mainstream of pedagogic researches from the 1980s to the 1990s.

Having these theoretical movements as backgrounds, the vector concerning the actual educational policies largely swung again from the above-mentioned universal orientation to the selection orientation. Moreover, concerning primary education, in general the systems imposing universal education on all people were criticized. In the United States, for example, freedom to give primary education at home, parents' direct participation in schools, and establishment of quasi private schools such as charter schools, attracted social interest. In Japan, the transfers of supervising authorities or financial sources from the central government to local governments became policy themes, and reforms were carried out to alleviate curriculum requirements and to give discretion to schools.

However, this does not mean that social demands toward the academic capacities formed by primary education were lowered. Instead, in response to economic globalization it was widely recognized that children's academic capacities became large factors for individual achievements and economic development of the society as a whole, and political influence became stronger, especially since the 1990s. As a result, a demand for a reform in the direction of standardizing the curricula nationally has become strong. In the United States and England particularly, where local government authorities have been traditionally strong, reforms have been carried out in the direction of strengthening central government authority regarding the achievement levels of academic capacities. That is, the vector of the universalization has also been gaining

power.

In this sense, the primary education policies in advanced countries at the beginning of the 21st century are in chaotic circumstances, including various vectors. That is, it can be asserted that the modern model of primary education contains turmoil and contradiction in the search for new possibilities.

### **3. The influence of advanced countries over developing countries**

The above discussion shows that the public education model of the advanced countries was established while including various conflicts and that it is also changing at present. The developing countries, in various forms, have come under the influence of primary education systems of the advanced countries.

#### **3.1. The transfer and adaptation of the public education system**

Many developing countries have colonial experiences, and, including even those without such experiences, they have often formed prototypes of primary education under the influence of the advanced countries. The localization of school education advanced in the 19th century, and it can be positioned as a so-called corollary of the process of developing modern public education in their suzerain countries. The public education was generally transferred to the developing countries when the above-mentioned ideas of universalization orientation and system designs were about to reach their peaks.

However, in the developing countries these designs also lacked a realistic basis. First, as described above, in the European countries and the United States, certain scales of basic education already existed, and a sizable number of families and regions have provided education autonomously to children. Since modern education was established in the form of rearranging such customs, the roles of the families and regions were not dissolved, but were just incorporated in modern public education led mainly by the states. Many developing countries lacked such a foundation. Moreover, even though the states themselves asserted that they would consider the construction of public education as their task, they completely lacked the financial basis. As described above, in the advanced countries it was only from the beginning of the 20th century when states became financially able to support public education that had previously been completely supported by regional societies bearing the costs. In many developing countries, the

income levels themselves are quite low in rural areas, and the regional societies lacked an organized system of gathering individual costs.

Then how did the developing countries really adapt public education as a transferred system? They did it by means of three forms.

The first is a pattern that forms and continues the public educational systems in advanced countries, separately from most of society, as part of the modern sector established in part of the society. The public education system formed and maintained by the states with their own hands is tentatively established to range from primary education to higher education, but the system is not established as a national education because primary education does not spread to society as a whole. One characteristic of the system is that high-level educational contents are maintained even at the stage of primary education, that enrollees are selected, and that certain criteria are strictly applied to their advancement of grades and graduation. At the same time, teachers occupy social statuses as the bearers of these criteria and, more broadly, in the regional societies as representatives of the modern sector linked directly with the central. The ways of the schools themselves make it more difficult to adapt to the regional societies. This pattern can be seen often, particularly in African countries.

The second form is a fusing of modern education with the systems of traditional regional societies. Thailand is a country in Southeast Asia that without a colonial experience advanced the introduction of the modern system on its own, but it was difficult to establish its own school system supporting primary education. Therefore the diffusion of primary education was carried out by positioning it in Buddhist temples throughout the country. Such a form was continued until the 1970s when obligatory primary education was completely implemented and extended to the six-year system. Moreover, Islamic countries such as those in the Middle East, Malaysia, and Indonesia in Southeast Asia promoted the diffusion of primary education by recognizing schools of Islamic temples (Madrassah) as part of the public education system. However, this form of spreading has a clear limit of educational contents and of the aspect of spreading a national knowledge system in modern education.

### **3.2. Postwar primary education**

Many former colonies became independent states after World War II, and the developing countries set up a goal of achieving economic development quickly. In the advanced countries, the welfare state policies became full-scale, and the political

ideology aiming at realizing social equality through education had power. In either context,, expanding and improving primary education in the developing countries have quite important meanings. It can be called the first international “education boom.”

The symbol was a series of “regional education plans” organized per regional block in the world in the beginning of the 1960s by UNESCO (United Nations Educational, Scientific, and Cultural Organization), which played the central role. The plan concerning Asia was called the “Karachi Plan” by taking the name of the host country of the conference. A salient tendency shared by the series of plans was a quite optimistic forecast regarding the diffusion of primary education. In the Karachi Plan, primary education in Asia was supposed to reach almost the level of universalization in the 1970s. It was supposed to be the implicit consent that governments in the countries would become the core of the diffusion of primary education and would have the capacity to achieve it. This very strong and optimistic universalization orientation covered the world.

In the background of the movements, as described above, the universalization orientation of education in the advanced countries exerted a decisive influence. However, besides this were some factors supporting the orientation.

The first factor is the diffusion of education in the socialist countries. Following the Soviet Union, Asian countries such as China and Vietnam transformed themselves into the socialist countries they were before or after World War II. In these countries, education was positioned as the axis of the construction of socialism, and primary education reached a condition of near-perfect diffusion of primary education in a very short time, even though they were agrarian and low-income countries in which the diffusion of education was historically late. This showed that the diffusion of primary education could be carried out quickly with strong state commitment. Many developing countries at that time aimed at socialistic development, so it is not doubtful that the circumstances became the factor allowing an optimistic forecast of diffusing primary education. Moreover, many experts of pedagogy in the advanced countries supported this viewpoint.

The second factor was the economic circumstances of the developing countries. From the 1960s to the 1970s was a stage of long-term economic growth for the advanced countries that pushed up international trade volumes and prices of such resources as mineral and agricultural products. Many developing countries exported these resources, which brought certain economic growth also to the developing countries. Moreover, the financial revenues of central governments increased smoothly because imposing taxes

on mineral and other resources were easy at the time of their production, and because it was also possible to impose taxes at the time of exporting agricultural and other products. The central governments, reflecting these financial circumstances, could thus divert certain resources to education.

In fact, under these circumstances education in developing countries smoothly expanded from the 1960s to the 1970s, and primary education was not an exception. When viewed closely, it was not the speed expected in the Karachi Plan, and disparities among the developing countries have already widened. Moreover, though the number of people enrolling in primary education has increased, the scale of increase was extremely limited when the completion rates were considered. However, it was true that progress had been accomplished in a certain direction.

Still, the expectation for development has rapidly decreased since the latter half of the 1970s. The direct factors were the growth slowdown of the world economy after the oil shock and the accompanied decreases of trade volumes and prices of primary products. These changes caused serious problems in the whole economies of developing countries and in government finances. The expansion of primary education, having mainly relied on the expansion of the financial capacities of central governments, was directly affected by these movements (Hamano, 2003).

When considered from a wider perspective, it is shown that the expansion model of primary education relying on the central government initiatives and financial capacities had large limits. As described above, it is generally understood that the socialist countries showed high performance in the expansion of primary education, but the large problems in reality now began to become apparent. The basic problem is that while central governments had strong discretion on one hand, the financial capacities did not reach a capability of maintaining primary education nationally at a certain level. Therefore in China, for example, people's communes, having aspects both of local governments and of companies, financed the wages of a certain number of teaching staffs. The teachers hired in this form have been called "Bian Min Jiao Yuan" and have existed since the beginning of the Great Cultural Revolution. The imbalance between control and cost was maintained in the structure where the government and the Communist Party have jointly controlled society. However, this meant that the doubly strong control was imposed on the school organizations and educational contents, and that changes would occur not because of the logics of proper education, but because of political factors. In this sense, it can be said that the temporary collapse of school education during the Cultural Revolution was a natural consequence. In Vietnam,



education was located in the double power relation of the educational government administrative organizations and of the “communes,” which become quite important fetters of the educational contents and organizational efficiency, and they remain so even at present.

On the other hand, however, in the stage of economic growth from the 1960s to the 1970s, the spread of primary education advanced smoothly, and there were many countries that achieved universalization. In the 1950s, South Korea and Taiwan had already achieved the universalization of primary education, and then of secondary education. Furthermore, Southeast Asian countries such as Thailand and Malaysia universalized primary education in this period, and slightly later than these countries, Indonesia reached a nearly universalized level. Having as two poles these Asian countries and other countries centering on Africa, which had experienced temporary setbacks, the trend until the beginning of the 1990s was that primary education in the developing countries showed a bipolar sign.

### **3.3. The Jomtien system**

After the process, movements asserting that world education should be considered an international task, especially the movement asserting that the universalization of basic education should be considered as such, became apparent in the beginning of the 1990s. The “Jomtien Conference” that opened in Jomtien, Thailand, in 1993, was a milestone of these movements.

#### **The context of the Jomtien system**

The reasons why political commitment focusing internationally on basic education in the developing countries was formed again among the advanced countries at this time have already been analyzed (Yonemura, 2003), but I would like to list the following two points:

The first thinkable factor was that the above-mentioned setback trend was recognized in the universalization trend of primary education after the first educational boom, which led to the above-mentioned universalization orientation, especially the positioning of education as a human right. The postmodern thought trend in the advanced countries was criticism of the modern period as well as a strong position on the realization of the rights and values inherent in human beings; thus in a sense the international universalism had an affinity with the postmodern thought trend. Moreover,

such organizations as NGOs or NPOs, which were the groups, other than governmental organizations, operating for public purposes, have grown as part of the postmodern movement in the advanced countries. Many organizations aim at basic human rights and welfare and can operate beyond national borders rather easily because they are not governmental organizations. It is probably true that the increased activities of group operations became one factor of drawing international attention to basic education in the developing countries.

However, it is impossible to think that these factors became the direct factors that would form the concrete commitment, including international organizations. Another important background situation was probably the progress of globalization in the sense of the liberalization of world markets. That was premised on the free circulation of humans and materials, so the poor uneducated population totally separated from the international common sense of values and life habits cannot be locked up in any particular country or region. To accept the population in globalized societies can eventually become serious threats to the societies. For the globalization to function, it requires that basic education should be universalized in all countries. It can be said that the logics are in a sense parallel to those utilized by the advanced countries in achieving the universalization of primary education.

In this sense, as the universalization of primary education was discussed in the form of the national education in the West European countries about two centuries ago, it can be seen that the universalization of primary education in international society now begins to be discussed. However, the analogy should be stopped there. In a series of researches carried out by international organizations in their preparation for the Jomtien conference, financial resources necessary to reach 100% of the international enrollment rate of primary education were estimated, and the discussion was carried out, asserting that it would be possible to fund the resources with international assistance. If this had indeed been possible, the old “national education” would have been transformed into a transcendent “education of global citizenship” by now. However, the estimated calculation clearly underestimated the costs, and thereafter the issue of the international burdens of expenses is little discussed.

### **Contemporary problems of the universalization of primary education**

In reality, it is doubtful that after the Jomtien conference any steps toward universalization were apparently taken in terms of primary education in the developing countries. It is even not so meaningful to discuss it by using international statistics.

Ironically, one point that became apparent as a result of workshops and other efforts carried out mainly by UNESCO during this time was that there were many inappropriate parts in the school enrollment statistics themselves for the discussion aiming at achieving universalization.

Because clear progress is not seen in the situations means that the tasks of the universalization of primary education include far more complex problems than they had been assumed to have, and it is difficult to develop an idea and strategy that will be common to countries. As for primary education in the contemporary developing countries, as described in the first section of the present thesis, there are various points of argument regarding positioning in the development, roles of the central governments, regions, and families, and school organizations and educational contents, but the agreement to set a single development strategy has not been formed.

It can be said that it is natural when the points discussed in this thesis until now were reviewed. The universalization of primary education in the contemporary developing countries is required to answer all of the following three tasks at once.

First, the universalization of primary education itself has a universal orientation. I would like to confirm that it is now required to establish the system called public education, which was created as an idea by the advanced countries of about two centuries ago and which took them a century to realize. The status quo is far from achieving this in reality if it does not accompany universal human rights, state roles, efficient and standardized school organizations, and educational contents.

Second, however, the developing countries lack the ways of families and communities that existed prior to and that formed the basis of public education created historically by the West European countries. Besides this, in the developing countries the existing public educational systems often deviate from, and transform, the original ideas because public education was transferred as a social system in the colonial era or even after entering the 20th century. The totally different structure is formed by ignoring the selection orientation hidden beneath the universal orientation superficially upheld, as well as by the tense relationship between them. The way of public education in contemporary developing countries is required to be deconstructed. If not, it is quite difficult to form the basis of modern public education.

Third, in the advanced countries there are discrepancies between the already established public education and socioeconomic development, and searching for new forms has begun. Pedagogic experts in the advanced countries are now carrying out research centering on this search, and it is good to say that the focus of these

international research efforts is directed at the search. It exerts influence on the educational experts and administrators in the developing countries. Moreover, setting the tasks by the advanced countries exerts a strong influence on national aid policies and also on the policies of international aid organizations. Furthermore, NGOs and NPOs in the advanced countries exert influence beyond national borders through their own routes. Thus the developing countries end up being affected strongly by the alterations of so-called modern public education itself.

The second and third factors described here have quite different backgrounds, but the factors often quickly appear with a similar vector in a discussion regarding education in the developing countries. It then also causes new disorder. In any event, the difficulty of the problems of universalization of contemporary primary education arises because the discussion needs to be done in a confusing context.

### **Conclusions – Meanings of the Japanese Experiences**

Then what is needed to escape the aporia described above? Here, related to this, I would like to mention the meanings of the Japanese experiences. In a sense, the Japanese experiences of the universalization of primary education are unique. Japan started the modernization at the end of the 19th century when the West European countries established modern public education and realized it full-scale. The modernization strategy is to rapidly transfer the modern systems of the West European countries, and it can be said that the representative was public education. Moreover, it is said that primary education subsequently diffused rapidly, making important contributions to the formation of the modern states and, eventually, to their economic development.

However, that does not necessarily lead to a simple discussion asserting that the Japanese experiences had become the model of the contemporary developing countries. When examined more closely, Japan was found also to have had policy difficulties and problems, described above, and they have remained until now while changing their forms. Still, the ways by which Japan dealt with them have important meanings regarding potential responses to the above-mentioned aporia. I would here like to mention the following two points related to those already discussed in my other thesis, “Stages of Development in Primary Education: Japanese Experiences” (Chapter 2).

First, Japan shouldered excessive national costs for the establishment and diffusion of public education at the beginning of the development of its transfer. The

characteristics are clear by comparison to the situation England experienced, for example, where public education was formed only after a long time. The throwing of resources into public education was accompanied with a positioning as the investments of individuals or of society leading to the selection orientation on the one hand, but it was nevertheless the universalization orientation in terms of the formation of the people that decisively promoted the positioning. The costs were spent as so-called initial investments for the modernization at a stage where full-scale economic development had not yet been realized, and as the effects appeared, the educational expansion as individual investments occurred (Kaneko, 1995).

Second, however, the actors of the initial educational investments were not the central government, but regions (villages) and families. The universalization of primary education as the ideology was economically supported by the regions and by the people at the initial stage. However, a much longer period was required than what was recognized in general until the universalization of primary education was achieved in reality, and it was the central government that became the core. In this sense, the universalization of primary education was in the gradual developmental process, and according to each process, the government took a different policy and changed the system. The characteristic of the Japanese experiences is that the gradual and dynamic changes of the policy and system regime can be far more clearly distinguished than those in the West European countries and in the United States (Chapter 2).

Third, the two aspects of the control and finance of primary education became the axes of the policy system changes. Moreover, this point was the most lacking part when the primary education of the contemporary developing countries was considered. There is a reason for this. The control and finance of primary education comprise the part composing the so-called framework of the modern states, and the problems of the democratic system and of the location of power were often exposed most notably; therefore it is the most difficult part for international aid organizations, foreign aid, and related researches to deal with. However, the discussion regarding the primary education of the above-mentioned developing countries will not advance unless these aspects are considered. Including this, the meanings of the Japanese experiences have quite important implications, and in this regard, I would again like to discuss them separately.

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