One of the striking features of international conferences organized by Unesco and other international organizations which discussed educational planning in recent years in Washington, Paris, Karachi, Beirut, Addis Ababa and Santiago, has been the high measure of agreement on the question of how educational problems should be approached. The consensus of opinion was that education cannot be treated apart from other areas of national life; the issues raised by economic progress and changes in social structure have to be taken into account when educators draw up new educational programmes.

The object of the present study is to present in outline the factors involved in setting up educational planning programmes in a socio-economic context. The study aims also at showing how such programmes can succeed in offering the best possible opportunity for national advancement in the sphere of education, while ensuring that the most effective contribution to the country's overall development is realized.

This document, originally written in Spanish and prepared by the Unesco Secretariat, was designed to meet specific Latin American educational conditions. Before extending its range of application by issuing it in English and French in the Unesco series Education Studies and Documents, matter which was only pertinent to Latin American needs has been removed and the text revised in terms of a broader scope of interest. It is hoped that this wider circulation will stimulate educationists to draft programmes of educational planning for their own countries and local conditions, and will assure in addition, the writing and publication of further general studies in what is becoming an increasingly important educational field.
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Today as never before, the development of education is of prime and indisputable importance to every country in the world. The swift and far-reaching social changes now in progress, the enormous growth of population, the exigencies of quickly developing economies and the wealth of knowledge and technology available are some of the factors which give the problem special urgency today. The possible ways of meeting the various countries' individual needs in education call for trained men in large numbers and special financial provisions, in addition to new methods of teaching and education. As though this were not enough, there is also the fact that, at the same time, all countries desire some degree of economic and social progress, and the call for capital for economic development, to raise the living standards of the people, is in competition with the need for extra financial resources for education. However, it is quite clear that there is a close interaction between the two requirements, since, while education's demands on the economy are steadily growing, the development of the economy itself necessitates a geometrical progression in the numbers of trained staff available, both experts of every kind and people with a good general education. This interaction, occurring in most countries in the midst of far-reaching social change, requires that their educational systems shall provide that equality of opportunities which democracy proclaims.

The complexity and urgency of this task, facing all peoples if they are to reach the rate of economic and social development they aim at, has brought planning to the fore as the best means of organizing the action required rationally and systematically for the future. Historically speaking, it would probably be an exaggeration to claim that economic or social development depends on planning, and it would be a yet more serious distortion of the true picture to allege that planning, however proficient, is a guarantee of economic and social progress. Nevertheless, while we do indeed need to beware of such exaggerations, the facts show no less clearly that planning is not just a craze. There can, of course, be progress without planning when circumstances are exceptionally favourable, and conversely it is possible that there may be no progress even with planning; but it can be asserted quite as fairly that, whatever the circumstances, sound planning increases the possibilities of success. An even more important point is that, good planning helps to create propitious conditions for the economic development and social change desired.

For nearly 20 years planning, as such, was the subject of heated argument, though that stage is fortunately now past. The question is no longer whether planning is possible or reconcilable with the democratic ideology, but principally how planning practice can be improved. The problem has become rather one of procedure and method. It could not have been otherwise, since the idea of planning goes back to the very beginnings of Western culture, being seen in men's efforts to apply the scientific method to the study of natural and social phenomena, in the hope of increasing humanity's ability to foresee the future and deliberately to help on social progress.

Hence the abandonment of the old doctrine of laissez-faire in favour of one which maintains that social progress should be engineered. This notion of social evolution as something that can be accelerated has the idea of planning implicit in it. A glance back at the controversies of the past enables us to place as the disputants the followers of the Marxist Socialist line, on the one hand, and, on the other, the disciples of Nineteenth century English liberalism.

In the first half of our own century, the marathon debates on economic planning occasioned by the impact of the Soviet Five-Year Plans, did not prevent a few authors, such as Mannheim and Tugwell, from examining the prospects which planning offered in the sphere of social policy. Fortunately the debate gradually shifted from the ground of theory to that of practice, once it was grasped that the only choice available was between good and bad planning. Today, in point of fact, there is planning to a greater or lesser extent and with varying degrees of success in every modern society.

In the Soviet Union, at the start of the new régime, the Central Committee did not go beyond adjusting classical economic concepts to the new social and political norms. This led to the notion
of economic co-ordination based on knowledge of the working, potentialities and expectations of the various undertakings, for which the Supreme Council for the National Economy was established in 1918, with a "collation service" using those data to study the trends of the economy. In 1920, however, there was a change-over from collation (forecasts) to direction (programmes), and so the "single economic plan for the forthcoming period" of fifteen years came into being. 1921 saw the foundation of Gosplan, the State Planning Commission, which is still in existence and has gradually become more and more important. From 1923 onwards, successive Five-Year Plans were promulgated, affecting progressively wider circles of activities in the country, and subordinating everything to the State's economic development and government policy. A number of other post-war socialist countries (Czechoslovakia, Poland, Bulgaria, Yugoslavia, Rumania, Hungary) started by adopting so-called single plans produced by bodies similar to Gosplan. In 1949 COMECON (Council of Mutual Economic Assistance) was established, with the object of integrating the production plans of the group of countries mentioned.

All this notwithstanding, and despite the fact that, down to the start of the last World War, economic textbooks in the so-called capitalist countries ignored, even deliberately, the existence of planning as a science, the fact remains that planning as a practice is of ancient date in the Western world. It originally developed in the ordering of material constructions, particularly in architecture and town building, but acquired its dynamic connotation only with the Industrial Revolution, which produced practical planning in the private sphere of big business, when the State policy was one of laissez-faire. However, the growing exigencies and complexities of an industrial society gradually opened the way to State intervention in many sectors. As a result plans for communications, public health, modernization of plant and machinery, etc., were produced and, as a simultaneous side-effect of this, planning procedures were developed and some planning techniques began to take shape. The process culminated in economic planning, beginning at times of major economic depression and crisis, to secure adoption thereafter as an instrument of modern public administration in the most diverse situations. Thus, in France, there was the Tardieu Plan of 1929 and the Marquet Plan of 1934, followed later by the Monnet Plan of 1946 which established the Commissariat Général de Modernisation et d'Équipement (for the modernization of plant and machinery); in Italy, the plan for the development of agriculture in general and the Pontine Marshes in particular, and the latest Vanoni (ten-year) Plan (1955); in the United States of America, the TVA (Tennessee Valley Authority), the already classic example of planning in a capitalistic economy, begun in 1933 as part of the New Deal planning and the so-called New Frontier policy; in Switzerland, the Wahlen Plan for agriculture, during the late war; in Puerto Rico, a long succession of economic development plans going back to 1942; in Pakistan, two five-year plans (1955-60 and 1960-65); and in India three, from 1951 onwards; etc. All these endeavours to impose some degree of discipline, great or small, on economic forces, have led to the emergence of practical ideas on social planning and involve, determine, demand or encourage the overall planning of education.

Nowadays there is certainly no country in the world which does not use planning in some form or another. There are at least 20 or so "single economic plans" and about five hundred economic and social plans of various kinds in progress.

Mention should also be made of a new variant of planning now starting to spread, namely, multi-lateral planning. The Marshall Plan of investments for European reconstruction was one example, and others are the concerted plans of groups of countries such as those of the Organization for European Economic Co-operation, the British Commonwealth, the French Community or the countries having common economic and political interests with the Soviet Union. In the sphere of education, the first notable efforts on these lines are the Unesco Major Project on the Extension and Improvement of Education in Latin America (1957-1967), the so-called "Karachi Plan" for the development of primary education in Asia, worked out by the Regional Meeting of Asian Member States on Primary and Compulsory Education (December 1959 - January 1960), the plan for the development of education in Africa outlined by the Addis-Ababa Conference (May 1961), and lately the ten-year education plan of the Alliance for Progress approved by the Special Meeting of the Inter-American Economic and Social Council at the Ministerial Level, held at Punta del Este (Uruguay) in August 1961.

The most summary consideration of the existing plans shows that planning methods and ideas still differ profoundly between country and country. The primary reasons for these differences are to be found in the geographical and human situation, political circumstances, the economic system and the motives and objects of the planning.

It should be noted that, leaving aside the socialist-communist countries, there are at least four different ideas of planning: emergency planning; authoritarian planning; "programming"; and partial planning.

The picture planning will present in the future will depend to a great extent on the kind of men who undertake it, on the methods adopted and on the special circumstances in which it has to be carried out.

We may expect that after a relatively few years, planning methods will grow to resemble each other increasingly, and that the word itself will definitely lose the political implications which it has
been sought to attach to it as a medium of "economic direction", since what is affected by a country's political organization is not the technique or machinery of planning but the objectives set by the government and the spirit in which it is carried out.

As the scope of economic development plans has gradually widened, they have come to reflect the need for close correspondence with any attunement to social development, including the development of education. Conversely, those in charge of the development of education have been becoming increasingly aware of the need to link programmes in their sphere with the economic plans in order to make them realistic and to safeguard the principles and objectives of education. Thus the notion of the overall planning of education falls within the social planning sector and its methods are inspired by those of economic planning.

A chronological study of plans and programmes for the acceleration of development over the last quarter of a century reveals the following parallels in the successive shifts of attitude of the parties:

Economic planning: (1) Development plans for specified sectors of the economy; (2) All-round national development plans, primarily economic in nature; (3) Plans for economic and social development, with increasing attention to educational development, even though restricted in most cases to vocational, technical and higher education or research; (4) Very recently, a trend towards team-work, whereby the economic and social development plan may take into consideration all the problems of balanced educational development set out by the education specialists in close collaboration with the economic planners.

Educational planning: (1) Educational reforms, not being plans of action in the strict sense but qualitative planning relating to the objects, structure and content of education, with a view to adapting the system to changing conditions, but usually "a day behind the fair" and outstripped by the speed of events;
(2) Educational reform plus concurrent plans and programmes dealing with one level or branch of education only or alternatively with a particular institution or problem, usually ignoring the economic situation and many of the social factors operative;
(3) Overall educational planning, a very recent idea, bringing about a balanced development of the whole education system and allowing for the economic and social factors operating in the country concerned in order to fit into the general development plan.

These parallels illustrate the gradual change-over from the piecemeal approach attributable to the blinkering effect of exclusive concentration on the immediate considerations in a particular field to a balanced all-round view born of the realization that the various domains interact and are mutually dependent.

The study of population data and of requirements in trained manpower and specialist staff has played a special part in demonstrating the need for the co-ordination of educational and economic planning, for educational planning, which aims at expanding a country's educational opportunities and improving the yield of the educational system and the quality of teaching to the maximum compatible with the resources in men and money available, itself contributes very directly to the economic and social development of that country by adequate and effective investment on its human capital. Nevertheless, integration of the educational with the general plan ensures better direction of a country's long and short-term efforts to priority items, without thereby necessarily compromising the irreducible educational needs of the individual and the society.
Educational systems take shape in response to many distinct demands from the societies that created them. Their control is shared by different levels of government, by private organizations, educators, parents, and the students themselves. This means that allocations to education and returns expected to be derived from education are not determined only according to socio-economic needs, even if planners could be quite sure what these needs were.

However, from the economic point of view, it is essential to be able to determine what priority education is to be given in the face of conflicting claims on scarce resources. On what basis, for example, is a certain sum to be earmarked for roads, another for schools, a third for housing, a fourth for the establishment of industry, and so on? The establishment of appropriate priority criteria is a matter of fundamental importance to planners, and it can be rationally done only by taking into account the costs as well as the returns of given investments. Unfortunately, this introduces very considerable complexities, since education is not easily comparable to other forms of productive investment. Indeed, education is distinguished by four major peculiarities. In the first place, it is both an item of consumption and a factor of production, the former because it is valued and demanded for its own sake quite independent of its possible practical applications, and the latter because it produces the skills, attitudes, personalities and milieux upon which modern technology and organization rests. Thus education can be anything from a luxury indulged in by the rich for purposes of prestige to training in the very specialized fields without which sophisticated production methods are impossible.

A second peculiarity of education is that it yields a very high margin of indirect returns since it is aimed directly at modifying people rather than things. It is always easier to produce or replace consumer goods than it is to create the skilled manpower which makes them. Besides, education also acts to promote self-discipline, to widen horizons, to open up fresh opportunities, to create markets - in short, it lends range, flexibility and scope to society itself.

A third peculiarity of education is its highly differential cost and yield according to a country's general level of economic and social evolution. Education not only costs more when pre-investments in teacher training, school buildings, new textbooks and so on must be made before a given programme can be put into effect than it does when existing resources merely need to be expanded or re-deployed, but it may also yield less in societies inadequately organized to make full use of talent and training. Increasing and decreasing returns related to scale and quality, the costs related to age structure and the geographical dispersion of populations and factors dependent on discontinuities are important exogenous variables affecting the cost of and returns on education which unfortunately tend to work against the best interests of poorer countries and therefore make it all the more important for investment decisions there to be worked out with the greatest foresight.

The last distinguishing characteristic of education is that, of all the possible tools at the disposal of the reformer, it is the one most hedged about with non-objective and non-measurable considerations. Education, after all, is an integral part of a total culture; in some ways, it is the most important expression of accepted values. As such, any tempering with it is likely to arouse the strongest opposition and to be interpreted as an attack on cherished traditions at their very source in a way that other pieces of social engineering (a drive to industrialization, for example, an irrigation scheme or a health programme) are not. This being so, education hardly lends itself to the mechanistic approach, though at all levels it competes for attention, standing and financial support with other endeavours. From the purely economic point of view, projection of skilled manpower needs must serve as the basis for the efficient allocation of resources not only to the educational sector as a whole, but to its component parts also. Without projections of the types of skill which are likely to be in demand a decade or more ahead, and the number of trained persons who can expect to find appropriate employment, there is a considerable risk of bottlenecks in the form of shortages of skilled labour, or else of creating an oversupply of certain qualifications. Too many lawyers cannot be offset by too few engineers. Though there are countries with an absolute shortage of trained
personnel, where all forms of schooling are in potential demand, the more usual dilemma is that of the shortage of certain skills only, sometimes even accompanied by overt or disguised unemployment of those who, from the point of view of current needs, have acquired proficiency in the wrong fields. Indiscriminate investment in education can lead to human and material waste: the optimum returns are obtained through a careful analysis of trends in the economy, and the allocation of resources to key educational sectors in accordance with projected manpower needs.

Furthermore, it must be understood that education is by no means a homogenous service which can only be administered in a single manner. On the contrary, there are many possible permutations and it is always worth examining different alternatives to see which suits a given situation best.

The demand for education in the developing parts of the world is already great, and continues to grow. It is inconceivable that anything more than a handful of specialist-teachers to play a strategic role in educational development can be supplied from abroad; the great mass of the teachers will have to be found locally in each country. Yet the shortage of teachers and facilities is already serious, and it is likely to become more so. Hence it is urgent to explore the alternatives being opened up through what constitutes a veritable technological revolution currently taking place, partly in response to labour's differing capital factor endowments. A growing knowledge of the learning process is affecting the content and structure of curricula and pedagogic methods and thus economizing on teaching time, while new methods involving television, machines, radios and so on which are being evolved, tend to modify the hitherto accepted pupil-teacher ratio. A thorough examination of the applicability of such methods together with their adaptation to each particular set of circumstances, can either lower the unit cost of education (which is labour-intensive and has a low input content) or raise its efficiency, or both.

As has already been pointed out, education is both an integral part of a total culture and an item of consumption, highly valued by some for its own sake. From the social point of view, it is neither desirable nor indeed possible to regard it merely in its utilitarian guise. The question therefore arises of balancing utilitarianism against what might be described as thecivilizing function of education, a question which arouses constant controversy everywhere. In some of the affluent societies it has lately been felt that too little attention is being given to the humanities, and that the tendency towards ever more specialization at an ever lower age is ultimately self-defeating, since it becomes increasingly difficult for specialists without much common basis to communicate meaningfully with each other. In the underdeveloped countries, this is as yet mostly a somewhat remote difficulty but decisions concerning traditional versus innovative or vocational orientation of education are immediate enough. Obviously, the traditional functions of education (preserving the continuity of a civilization and contributing to the development of cultural identity) cannot be neglected; on the other hand, if a break is to be made with the past, too much emphasis thereon would be a mistake. It is therefore necessary to ensure that education fits harmoniously into the pattern of change, that it is sufficiently progressive to produce the kind of social and technical leadership required while at the same time not isolating those who are privileged to receive higher education from the national cultural and social heritage. People may acquire a modified outlook and new skills within one generation but they cannot be expected to readjust themselves entirely, to jump many decades of evolution which have taken place elsewhere. Educational planners are faced with the difficult task of having to be hard-headed and businesslike when they confront outsiders who may need to be convinced of the merits of their case, and sensitive and imaginative when they seek to adjust to cultural and social cross-currents.
III. EDUCATIONAL PLANNING IN VARIOUS REGIONS AND COUNTRIES

In almost all countries there is a more or less representative history of previous educational planning either under the equivocal name of "educational reform" or in the shape of limited plans for particular types of education. If, however, these plans are measured against the criteria recommended for the overall educational planning which is becoming daily more widespread throughout the world, grave shortcomings are found: no short and long-term objectives are set; there are no firm and detailed estimates for the execution of the plan; qualitative corrections are not tied in with each step in quantitative priority development; the proposed plan of action is not properly related to the structure and organization of educational administration; the proposed objectives are not realistically related to the material and human resources available; there is no planning method for the preparation, execution and evaluation of the plans.

The idea of overall educational planning was first propounded and commended to Latin America at the Second Inter-American Meeting of Ministers of Education, held at Lima in May 1956. The meeting agreed that, to solve the quantitative and qualitative problems facing the American countries in the educational sphere, the use of planning techniques was to be recommended, since the area's growing educational needs called for a systematic and forward-looking approach which would produce overall plans covering all levels and branches of education. At the same meeting, it was pointed out that education furnished the most effective means of stepping up economic, social and cultural development thus making a direct contribution to the needed improvement of living standards.

Concurrently with the Second Meeting of Ministers of Education, Unesco convened a Regional Conference on Free and Compulsory Education in Latin America, also in Lima, whose recommendations constituted the starting point for the Major Project on the Extension and Improvement of Primary Education in Latin America, approved for a ten-year period (1957-1967) by the ninth session of Unesco's General Conference. Although the Major Project, from the very beginning, put the accent on teacher training as the key to the extension and improvement of primary education, the first objective it indicates as an essential means to forecasting, policy making and action is the systematic planning of education. Moreover, the Major Project is in itself a significant example of planning on a regional scale.

The first result at national level of the Education Ministers' recommendation on the overall planning of education was the establishment of an Educational Planning Office in Colombia in June 1956, and the subsequent drafting of a report on the draft of the first Five-Year Education Plan published in mid-1957.

In 1958, the Inter-American Seminar on Overall Planning for Education, held in Washington and sponsored jointly by Unesco and OAS in pursuance of the recommendation of the above-mentioned meeting of Ministers of Education, made a powerfully reasoned declaration of the need for overall planning of education in America. Particularly significant is the same Seminar's recommendation that a Conference on Education and Economic and Social Development in Latin America be held "in order to consider, on a basis of adequate scientific studies, the relationship between education and social and economic development, the better understanding of which will be a valuable contribution to the effectiveness of overall planning for education". (Annex I.)

To ensure the due progress of overall planning of education in Latin American countries, the Seminar recommended, among other things, that those countries implement the recommendations by organizing the technical services responsible for the direction of educational planning on a basis of close co-ordination with those in charge of general economic and social planning at the national level; that international organizations offer the necessary technical assistance; and that courses be arranged for the training of the specialists required for planning.

Between 1959 and the date of writing, the following American countries received Unesco experts under the United Nations Technical Assistance programme: Argentina, Bolivia, Colombia, Cuba, Ecuador, Haiti, Panama and Venezuela. Requests for the services of experts in the near future have also been made by Chile, Costa Rica, Honduras, Nicaragua and Peru.

Approval was given, at the eleventh session of Unesco's General Conference, for a regional
educational planning team of three (one expert in educational statistics, one in educational planning and one in educational finance), under the work plan for the Major Project, to help towards more effective action and to organize courses or seminars at national level in the countries of the region concerned.

In this sphere, much progress has been made in the last two years: Argentina, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru and Venezuela have already started planning services on varying scales, and their studies and the plans they produce will, through rational and intelligent allocation of resources, permit of a considerable advance towards the objectives each country has set itself in education.

In October and November 1959, the first Inter-American Training Course on Educational Planning, organized by OAS in close collaboration with Unesco, was held in Bogota. It was attended by 33 fellowship-holders from 19 countries in the region. Other national courses have since been arranged in Argentina, Ecuador, Guatemala, Venezuela and other countries. In addition, 15 study missions from many other Latin American countries, each composed of a mission chief, an educator, and an economist, recently visited various European countries under Unesco auspices to study problems in educational planning.

The Conference on Education and Economic and Social Development in Latin America, Santiago de Chile (March 1962), now marks a new and decisive step forward in the urgent and fruitful enterprise of achieving in Latin America effective educational planning fully integrated with economic and social development.

But it is not solely for Latin America that the development of education is an acute problem. In point of fact, not a single country in the world can be said to have solved its education problems once and for all since, at the least, all of them are continually faced with new needs to be met, and the achievement of really satisfactory methods of teaching is still far distant.

Almost at the opening of the last decade - full of important events for the development of education in Asia - Unesco convened a Regional Conference on Free and Compulsory Primary Education in South Asia and the Pacific (Bombay, 1952) with two objectives: (1) locating the major needs and problems of this region in so far as the provision of compulsory primary education is concerned and (2) mobilizing the resources of the Member States as well as of communities inside and outside the region and enlisting the assistance of international organizations for meeting these needs and solving these problems. In 1958, a Regional Seminar on Educational Reform in South and East Asia was held in New Delhi to study specific problems on educational planning and administration. Since a good deal was done during this period of time, it was felt that a survey of the progress accomplished should be undertaken with a view to planning a more comprehensive and better co-ordinated drive for the promotion of education in the area. The results of this survey were placed at the disposal of a Regional Meeting of Representatives of Asian Member States on Primary and Compulsory Education, held at Karachi at the beginning of 1960, a real landmark for regional and national educational projects in Asia. As a result of these and other projects, there is definitely more appreciation of the importance and use of planning than ever before.

The great majority of countries in Asia today are engaged in some form of educational planning. Some countries in the Asian region have already established the necessary machinery for planning and have prepared general economic plans as well as educational plans. In some Asian countries purely educational plans were drawn up; in only a few cases is there little educational planning. There is no question that this recognition of the importance and need for educational planning, and the various steps which have been taken in this direction, have contributed to the great progress made in education. In India, even before the Planning Commission (which is the chief agency responsible for planning) was founded in 1950, several agencies existed for planning. Plans for education, which form a part of the National General Plan, are drawn up by various agencies at district, as well as at State level, and finally co-ordinated by the Ministry of Education before they are submitted to the Planning Commission. Sections for planning and statistics are found in all Departments of Education in the States as well as in the Ministry of Education.

Like other newly-emerging nations in its desire for the spread of education, Pakistan organized its first educational conference in 1947. As a result of the various studies undertaken, a National Plan of Educational Development in Pakistan was prepared in 1952 by the Education Division which was established by the Planning Board. The latest plan, the second five-year plan, has been prepared by the Planning Commission of Karachi for the period 1960-1965.

In Indonesia, the Bureau of Planning, which is under the direct control of the Cabinet, is the responsible organ for overall planning. At the Ministry of Education there is a Research and Planning Division as well as a Statistical Division.

In Iran there is a Planning Committee in each of the various ministries. The proposed plan for each ministry is considered by the Plan Organization, which is the agency responsible for overall planning in the country. As far as education is concerned, the planning is co-operative - action on the part of the Social Affairs Section of the Economic Division of the Plan Organization on the one hand, and of the Ministry of Education and the Institutions of Higher Learning on the other.

In Thailand, there are three bodies concerned with planning: a national body for overall planning;
a national body for educational planning; and a national body for research. The National Education Council is responsible for the planning of education.

In Viet-Nam, there is no central agency for educational planning, but in the Ministry of Education there is a Planning Department and a Study and Research Bureau capable of formulating an educational plan.

Thus, in practically all Asian countries some form of educational planning already exists. The need for a plan has been felt, and an apparatus has been created. Realizing these needs and following a recommendation of the Karachi Regional Meeting, mentioned above, the General Conference of Unesco at its eleventh session (Paris, 1960) approved the establishment of a Regional Centre for the training of educational planners, administrators and supervisors, being now organized in New Delhi.

The need for educational development is of course not limited to Latin America and Asia. There is not a single country in the world which has coped with all its educational needs.

The General Conference of Unesco, at its eleventh session, authorized the Director-General within the framework of the Emergency programme of Financial Aid to Member States and Associate Members in Africa to assist these countries in formulating plans for the development of their educational systems and in drawing up inventories of their educational needs.

The Conference of African States on the Development of Education in Africa, organized jointly by Unesco and the regional Economic Commission of the United Nations for Africa, at Addis Ababa from 15 to 25 May 1961, underlined the importance of educational planning as a factor in economic and social development. It formulated recommendations relating to the different stages of the planning process as well as to the creation or strengthening of the requisite administrative machinery for this purpose such as planning groups in the Ministries of Education, man-power boards and statistical services.

In the light of these recommendations and guided by the opinions of specialists chosen for their knowledge of and practical experience in planning, the Secretariat decided on ways and means of helping African countries in educational planning.

In accordance with the broad outline of this scheme, the first expert missions began work in July 1961 in response to requests made by the Governments of Upper Volta and Sierra Leone. Other groups will be formed for the following countries: Cameroons, Liberia, Somalia, Ruanda-Urundi, Malagasy Republic, Tanganyika and Kenya.

Technical assistance is in addition being widely given by Unesco to different countries in Africa. A Regional Training Course for Educational Planners and Administrators has been organized during the second semester of 1961 in Khartoum (Sudan).

In the Arab States a Regional Centre for the Advanced Training of Senior Educational Personnel is being organized under the Unesco programme in Beirut (Lebanon). The decision to establish such a Centre was made at the Conference of Representatives of Ministries of Education of Arab Member States, held in Beirut in February 1960, where the various participating countries recognized that many of the education problems they face are common to them all, problems which could be resolved by a co-operative effort in educational planning. Several Arab countries already have education development plans, e.g. Egypt, Morocco, Saudi Arabia, Syria and Tunisia.

European countries are also becoming increasingly interested and active in educational planning. The Unesco National Commission in France organized, in co-operation with Unesco, a first International Symposium on Education and Economic and Social Development in December 1959 at which 30 educators, economists and sociologists from all over the world were present. (See Annex II.) More recently, in October 1961, the OECD (organization for European Economic Development) held a Policy Conference on 'Economic Growth and Investment in Education'. This same conference, held in Washington, also discussed the Mediterranean Regional Project which, it will be recalled, is concerned with man-power assessments in relation to educational requirements in the region. National training courses are now being organized by several European countries.

All these examples afford proof of the growing importance attached throughout the world to the overall planning of education and are evidence of the realization that here we have a technique of the utmost utility, whatever a country's political or economic background.
IV. PRINCIPLES, METHODS AND TECHNIQUES OF OVERALL EDUCATIONAL PLANNING

It is practically impossible and probably unnecessary to lay down detailed rules on the method and techniques of educational planning which will be applicable to all countries and circumstances, but certain basic elements can be specified.

The Inter-American Seminar in 1958 defined the overall planning of education in the following terms: 'The overall planning of education is a continuous, systematic process, involving the application and co-ordination of social research methods, and of principles and techniques of education, administration, economics and finance, with the participation and support of the general public, in private as well as State activities, with a view to securing adequate education for the people, with definite aims and in well-defined stages, and to providing everyone with an opportunity of developing his potentialities and making the most effective contribution to the social, cultural and economic development of the country'. The regional or international meetings held since then have adopted fairly similar forms of words.

PRELIMINARY ACTIVITIES

The organization of educational planning operations necessitates such preliminary activities as the following:

Determination of the main objectives

The Constitutions and legislation of the Latin American countries lay it down that education is the responsibility of the nation or its component States, and accordingly each country or political sub-division directs, supervises and administers educational development, though frequently leaving wide scope for private enterprise. The Universal Declaration of Human Rights sets forth certain educational objectives which must necessarily be accepted in any well conceived and directed educational system, the following essential points warranting particular attention:

- Education for international understanding and cooperation;
- Equality of opportunity in education for women and men;
- Abolition of any form of discrimination on grounds of race, colour, sex, language, religion, political or other opinion, national or social origin, economic status or birth.

The major aims of long-term educational planning should take account of the following considerations among others:

- What is considered to be the function of education for the cultural, social and economic development of the country;
- How far are the educational services qualitatively and quantitatively adequate to meet the educational needs of the country;
- How far is it possible to make changes or improvements (in organization, content and teaching method) that will meet the educational needs of the country;
- What changes or improvements should be made in the educational legislation now in force;
- What is the economic capacity of the public and private sectors to finance the extension and improvement of educational services, in such a way as to meet the educational needs of the country;
- What changes are needed in the administration of education in order to make it more efficient.

The references for the determination of the major aims are:

- Individual opinions: of educationalists, philosophers, historians, statesmen, sociologists and economists;
- Corporate opinions: international recommendations, conclusions of congresses, seminars and commissions, yearbooks, cultural and religious principles, political principles, legal antecedents, surveys of educational conditions;
- Public opinion: ascertained through polls, broadcasting and the press, Commissions of Inquiry, etc.
- Descriptive comparative education and comparative analyses of major educational trends.

Preparation of a working guide or handbook for the use of the office or service to be set up

The handbook should cover: (a) the major educational planning objectives determined as above; (b) the detailed organization, means of action and
functions of the office established for these pur-
poses; (c) personnel and the financial means
necessary for the accomplishment of the functions
assigned to the office; (d) the principles,
methods and techniques to be followed.

Organization of the office or technical service
responsible for educational planning at national
and political sub-divisional level.

In this connexion, the following points must be
covered:
The juridical basis for the service's internal
organization: staff structure and functions;
Organic and functional co-ordination of the service
with the national economic planning service; the
man-power survey commission or service; the
Ministry of Education; the secretariats of edu-
cational of the political sub-divisions; other
services handling planning in fields other than
that of education; the organ, institutions and
various interests directly concerned with edu-
cation; the representatives of international
bodies, etc.;
The selection and training of the technical and
administrative staff, required for planning;
Providing the planning office with services such as
the following, or access to them: educational
statistics and surveys; documentation and
information centre; educational and vocational
guidance; educational research and technical
advice; school building, work organization and
methods; programme and budget;
Provision of office facilities: premises, furniture,
equipment and expendable supplies; miscel-
naneous services;
Budgetary appropriations necessary for the proper
functioning of the service.

Working out a plan is not a simple task and the
plan itself should be the work neither of a single
person nor of a small group exclusively. Demo-
cratic planning implies giving specialists technical
responsibility for planning under the authority of
the State and providing, at the same time, for free
discussion and methodical consultation of public
opinion at every point in the process where there
are aspirations to be defined, objectives to be
selected, and criticisms of proposed measures
or constructive suggestions to be made. This is
the only way of securing the necessary continuity
and efficiency in planning and the effective support
of all sectors of the community for the aims of the
plan finally adopted.

Enlistment of public opinion

Democratic planning should further stimulate
public and private initiative, at national and local
level, to develop the capacity of local and regional
communities for acceptance of progressively
growing responsibilities and functions in developing
the educational services. This will inevitably
result in educational development's being
influenced by a wide diversity of interests, but the
fact remains that an educational system cannot
operate in a social vacuum and cannot grow unless
it is also part of an extensive social plan. On that
account it is natural and desirable that the diverse
sectors of the society should take an interest in
the future of education, and it is therefore impos-
sible to solve educational problems exclusively in
the ministry or the study. Yet those who admini-
ster education have still not devoted sufficient
study to these social forces to have grasped the
influence they exert, the implications of a partic-
ular social stratification, or the importance of
particular vital elements in the country's tradi-
tion. It may well be that these are the problems
of greatest importance for the society's develop-
ment, and their treatment therefore a more diffi-
cult proposition than formulating social objectives
in broad terms. Steps must be taken to make the
man in the street really aware of educational
policy, using all available information and publi-
city media, since otherwise even the best plans
have little success or lasting effect.

In order to enlist the help of the public in the
preparation of plans, it is essential to propagate
digests of information about the situation, needs
and objectives of the educational system, since it
is all too common for people to hold back from or
be distrustful of matters which they do not under-
stand.

Another necessity is to contrive to secure the
participation in special working committees of
individuals and group representatives with an
influence on educational policy and practice.
Further, sample polls should be conducted on
those problems to which public opinion is most
sensitive.

Administrative attachment

Another factor of decisive importance in the
organization of educational planning offices or
services is their administrative attachment. A
fundamental principle is that they should be linked
with or incorporated in the departments which will
have to carry the plans out in due course. Above
all, however, their establishment must provide
expressly for effective co-ordination with the
national economic and social planning service, to
ensure the required integration of the educational
into the general development plan for the country
by close co-operation between the two bodies,
particularly during the stages when the problems
are being studied, priorities fixed, and finance
considered, and during the execution and evalua-
tion of the plan. An educational planning office,
therefore, must be the agency, through its plan-
ning work, for co-ordinating all the resources
available inside and outside the education service,
and the means of securing a close and direct link
between education and the economic and social
development plans. It goes without saying that co-
ordination is essential, firstly, with any other
educational planning bodies that may exist in the country's political sub-divisions and, secondly, with international or regional entities.

The premises of planning practice can be summed up as follows:
- Planning is a continuing function which requires a permanent organization;
- Planning is a complex operation requiring the regular collaboration of specialists, administrative bodies and advisory institutions;
- Educational planning must be integrated with economic and social planning;
- Educational planning should make use of whatever technical assistance the country may receive from international organizations;
- Participation by the public in educational planning is their duty and right as citizens.

Accordingly, when planning units are established, their constitutions should:
- Lay down clear-cut chains of responsibility and authority;
- Divide up the work in conformity with the objectives and effect optimum grouping of specialized operations;
- Establish simple and effective horizontal and vertical co-ordination chains through the successive phases and stages of the operation.

Dealing with educational planning of the limited type, considerations of practical utility are more and more often prompting the establishment of special planning offices as permanent bodies analogous to applied research centres, their composition varying according to the possibilities and needs of each country. They may be known as "offices", "departments", "units", etc.

Organizationally, their place in the general structure of the educational administration is normally at the top of a vertical chain, though there are cases of both multi-level and decentralized planning establishments. Planning offices normally have a senior staff of specialists on the several levels and branches of education with additional duties in the ancillary bodies.

REQUIREMENTS OF PLANNING AND ITEMS

Critical analysis of common educational planning practices shows that the following are the most usual faults: making plans without sufficient knowledge of the educational, social and economic situation of the country; making the plans dependent on considerations of political propaganda; producing plans without due sounding of public opinion; failing to relate the objectives set in the plans to the human and material resources available; lack of machinery for the supervision and correction of plans during execution, etc.

Requirements

The basic requirements of educational planning, as formulated in 1958 by the Inter-American Seminar, are:
- Objectivity, so that in no circumstances may personal or group interests be allowed to divert planning from its essential purposes;
- Application of scientific methods in studying the educational, cultural, social and economic realities of the country;
- Objective appraisal of the needs and of the choice between short, medium and long-term solutions;
- Realistic appraisal of the possibilities in terms of the human and financial resources necessary for efficient application of the proposed solutions;
- Continuity in order to ensure systematic pursuit of the objectives;
- Flexibility, to allow for adaptation of the plan to unforeseen or unforeseeable situations;
- Teamwork, to ensure efficient and co-ordinated effort;
- Internal co-ordination between the educational services themselves and between them and the other State services, at all levels of public administration;
- Periodic reappraisal of the plans and their constant adaptation to new needs and circumstances.

Essential Elements

The essential elements with which educational planning is to be concerned are:

(a) Quantitative planning, covering all questions involved in the expansion of educational facilities, based on pedagogical, demographic, geographic, economic and social factors. Among many other aspects, quantitative education refers to school population (enrolment, desertion and graduation), recruitment of teachers and supervisors, and the provision of classrooms and equipment (furniture, laboratories, etc.).

(b) Qualitative planning, covering aims, content and methods of education, in particular the structure of educational systems, curricula planning (by levels and branches), teacher training, educational guidance, pedagogic research, textbooks and other teaching aids.

(c) Administration of education, covering national, provincial and local administration as well as school administration and supervision. It is concerned with problems of personnel, administrative structure and administrative procedures.

(d) Financing of education, concerned with needs and assets; costs; sources of finance; distribution of expenditure (recurrent expenditure and capital investment); grants and loans.
Thus all matters relating to the aims, content and means of education, all of which are closely interrelated and largely conditional on each other, are assembled and classified, allowing of more systematic and efficient distribution and coordination of the work.

PHASES OF THE WORK

The work of planning is commonly divided into a set number of typical phases, which give the timing and method of work, in order to organize and seriate the expenditure of effort. The following may be distinguished:

i. Drafting of the proposed plan
ii. Consultation and adoption
iii. Execution and revision
iv. Evaluation and further planning

In this case, the initial phase covers the preliminary operations and the successive drafting stages, while the second phase concentrates on sounding opinion and getting the plan adopted. Execution and revision are bracketed to emphasize the drive and flexibility which the plan adopted needs to have, and the final phase is a general evaluation of where the plan has succeeded and where it has fallen short, for use in the preparation of a new plan.

Should phase (iii) cover "execution" only, it will mean that there are thought to be reasons for not allowing flexibility in the execution of the plan, in which case revision will come into the "further planning" phase to deal with the shortcomings revealed by the evaluation. It should, however, be pointed out that substantially different approaches still subsist, as, for instance, when the phases are reduced to (i) production of the plan; (ii) execution; (iii) further planning.

Here, the plan may relate to the educational problem as a whole or to a particular aspect of it. In some cases a plan is formulated arbitrarily by induction from what is known of the situation as regards education, which may or may not include the relevant social, economic, cultural and political considerations. In others, a similar procedure is adopted because those in charge of planning have no means of achieving co-operation on a broad basis in the governmental and private sectors. In either case the plan is confined to a few special or very general objectives. Correction and evaluation are impracticable or matters of indifference. In the "further planning" phase, new objectives are added, the earlier objectives are reviewed and the succeeding plan is settled.

In citing these examples from the multitude of possible variants - found in practice to greater or lesser degrees - we have referred only to such schemes as can be regarded as forms of planning because continuity is implicit. Failure to take this point into consideration results in the common case of the plan with no "further planning" phase, i.e. stultified because the initial scheme is not followed up or built on in succeeding plans. Another common case is that in which plans are roughed out by well-meaning and sometimes very able and well-informed individuals, who waste their energies by devising schemes without the firm foundation of careful study of the situation and consultations with competent and informed persons and institutions.

The designation of the planning phases is a primary responsibility of the technical planning service. The organization of the work of the first phase is based on the following considerations:

1. Nature of the plan it is sought to draft and execute
2. The main objectives in view
3. Staff, equipment and finance available for this purpose
4. Time available
5. Sources of information
6. The working procedure to be followed
7. Communication and consultation media

For setting the pace of each phase, the following points should be taken into account:

(a) The specific objectives of that phase
(b) Approximate time-limit for the work
(c) Staff and equipment necessary
(d) Methods and techniques applicable

Drafting of the proposed plan

The watchwords for this initial planning phase are:

(a) Organization. The deeper one delves into social, economic, political or educational problems, the clearer becomes the urgent and everlasting need for organization. This is specially true in Latin America. Planning can make progress only if properly organized, and the organization must cover both the information and the operations involved. The need for organization begins with the very first phase of planning operations and requires the most careful attention through all succeeding phases.

(b) Investigation. There can be no sound planning which is not founded on the results of investigation. But the investigation itself needs to be planned in advance. This means first ascertaining what data are needed and then working out a programme to fill this need as effectively as possible. In all investigations or studies, both the immediate requirements and the major objectives in view have to be taken into account. The fostering of the spirit of inquiry and investigation in education planners, and in teachers and educational administrators, is in itself one of the most constructive things that can be done to bring about effective changes.

(c) Co-ordination, i.e. concentrating the total effort on the pursuit of selected objectives and making the most of the material facilities, with a view to securing maximum returns and avoiding overlapping. Effective co-ordination
must be in evidence in dealings with the sectors with educational affiliations and all others concerned in any way in the overall planning of education. This principle remains valid through all four phases of the proceedings.

In this initial planning phase, it is desirable to differentiate between successive stages which may be summed up as follows:

**Investigation of the social and economic situation**

Investigation of the educational situation

Determination of educational needs and problems and production of possible solutions

Drafting of an overall education plan, indicating its objectives and the resources needed for its implementation

**Investigation of the social and economic situation**

Nowadays it is impossible to conceive of an educational system to which the problems of the age, the advances of science and technology, the labour situation, the study of human and natural resources, the problems of economic development and all the other considerations vitally affecting its objectives and means of expansion and improvement are all alien. What is more, educational administration cannot disregard government action in general. If educational planning ignores or misunderstands these facts and this interdependence, if it fails to weigh accurately these forces, ideals, problems and circumstances, its plans will be impracticable. Conversely, if economic and social planning does not include provision for the expansion of education and for financing it, worked out in close concert with the responsible education authorities, it cuts down its own chances of success and thwarts the most reasonable and elementary expectations of the society and the individual citizen. Hence the need for the co-ordination mentioned, to secure, to the profit of both parties, the fullest possible exchanges of information and opinions, in order to put forward agreed solutions taking due account of the needs, resources and common objectives.

Education plays an essential part in economic and social development, as it is at once a factor in production and a consumer commodity. As far as supplying requirements in trained personnel or raising living standards are concerned, its part in economic development is indisputable, while the soundness of investment in education will become increasingly apparent, not only in regard to technical or vocational education but also, and primarily, in regard to general education. The fact is that education is being at last increasingly recognized by all schools of economics as a primary sector or prime mover of the economy and, in connexion with its economic value, we should not overlook the importance of its effect on social progress, given the far higher certainty of successful economic development in a society which, thanks to a sound system of education, is culturally and politically adult.

However, while all the foregoing is incontrovertible, equal emphasis needs to be laid on the principle of the mutual influence of the schools and the general life of the society: although what education does is becoming increasingly obvious, there is not always the same appreciation of what is done to it, and the influence on it of the society and of economic factors is frequently passed over in silence.

Investigating a country's social and economic situation involves trying to reach a better understanding of how the interaction we have mentioned works, and studying the possibilities of introducing the measures appropriate from either angle.

**Demographic aspects**

These data are taken generally from the census and are published in accordance with the classifications and tabulations specially recommended for these purposes:

- Pyramid of total population (from year to year and at least from five to 25 years and by sex)
- Rate of growth of the population (birth and death)
- Projection of total population for the next five, ten and 20 years
- Projection of rural and urban populations
- Economically active population, by branch of activity and occupation

**Social aspects**

Among the social factors entering into the preparation of an education plan, two categories are distinguishable, the structural and the cultural.

(a) Of the structural social factors, the following require particular attention:

- General trends in the social and economic structure, as a result of which, for instance, countries at very different levels of economic development have identical standpoints as regards certain problems;
- Morphological aspects, including the demographic structure (age pyramids, sex, etc.) and its ecology;
- Characteristics of the system of social stratification (classes, castes, ranks);
- Organized or 'pressure' groups with a direct or indirect influence on the educational system, e.g. cultural and religious groups, social and economic groups, political groups, professional groups, organizations, unions, associations and corporations, etc.;
- Structure of the educational institutions themselves in relation to the structures of other organizations.

(b) The cultural social factors are determined by the subjective attitudes of individuals, groups, and communities which give rise to differing value systems, group aims, the society's own images of itself and particular aspirations.

The following should be kept in mind:
Factor of educational receptivity: obstacles or aids to the acceptance of a new educational system;
Factors bearing on the problems of structure from a cultural point of view, with particular reference to social mobility;
Factors deriving from the cultural homogeneity or heterogeneity of the society;
Factors stemming from what type of society it is desired to construct (liberal, totalitarian, pluralistic, etc.); MIS.
Miscellaneous factors (national mentality, folklore, customs, etc.).

Economic aspects

Among the economic considerations of most importance for the preparation of an education plan, are the following:
Gross national and per capita income, by major economic sectors;
Government income and expenditure at all levels, showing sources of revenue and types of expenditure;
Retail price and other economic indices;
Rate of production growth for the economy as a whole, for the main economic sectors, and if possible, for different branches of activity;
Volume of public and private investment, in total and by sectors and branches;
Manpower resources: shortage or surplus of labour and trained personnel; personnel requirements and openings for employment by levels of education.
The foregoing data should be supplemented by a study of the objectives and rate of execution of the national plan for economic and social development, and analyses of selected special studies carried out for the purposes of economic planning which may provide the answers to many of the considerations listed.

Though close co-operation between economists, educationists and sociologists is certainly desirable and productive at all stages of planning, this is undoubtedly one of the phases at which it is most necessary, and mutual consultation, discussion and exchanges of information should be arranged so that, when the time comes to work out the answers, the necessary agreement can be achieved with relative ease, a point which will be discussed further on a later page.

Investigation of the educational situation

In those countries where educational planning has been the practice for some time past, most of the necessary data can be extracted from the evaluations of the preceding plan. In cases where the investigation is the first of its kind, it is of great intrinsic value, since its findings are usually so revealing that they suffice, per se, to promote many essential improvements and changes by showing up, for instance, serious interdepartmental overlapping, unsound distribution of funds, arbitrary location of schools, shortages and poor quality of teaching staff, high wastage figures, etc. In addition, however, such investigation is an essential preliminary to the determination of total educational needs, which represent the difference between the situation as it exists and the long-term objectives.
The investigation should cover the four items already mentioned: quantitative aspects, qualitative aspects, administration and finance.
The qualitative and quantitative data, obtained from statistics and surveys and by studying documents, educational legislation, curricula and syllabuses, etc. should cover the following points at least:
Aims and results of education;
Structure of the educational system;
Curricula and syllabuses for different levels and branches of education;
Methods of teaching;
Administration of public education at the national, regional and local levels;
School inspection and management;
Teaching, administrative and office staff;
Particulars of student bodies in formal and adult education (enrolments, repeaters, wastage, graduates, handicapped, etc.);
School buildings;
Teaching equipment, including textbooks, material, furniture and audio-visual aids;
Educational institutions;
The financing of education: costs, sources of finance, distribution of expenditure.
Educational statistics services and documentation and information centres have a key function at this stage of the work in extracting the above data from the sources and classifying them in conformity with established international standards to allow of comparability. Once the data have been classified, they have to be reviewed to check the accuracy not only of the abstracting but of the procedure used to collect the original data. They are then analysed to produce the facts on which a report is written and issued, subject to possible later amplification and correction at regular intervals.

With regard to this phase of assessment of the educational situation, it is appropriate to repeat the point already made about the desirability of overall planning of education, and to emphasize that all these studies and inquiries should cover not only formal but also adult, professional and vocational education, since otherwise the picture secured would be incomplete and inadequate for planning purposes.

The use of the survey technique, and educational statistics, have grown considerably of late, and in recent years much progress has been made in the standardization of educational statistics and in techniques for the collection and utilization of data. At international level, an undertaking deserving of special mention is Unesco's "World Survey of
Education", which deals with the situation country by country for each level of education.

**Determination of needs and problems**

The qualitative, quantitative, administrative and financial needs and problems in education to be dealt with by short, medium and long-term plans, are determined from the investigations mentioned on page 18, bearing in mind the major objectives previously set for the planning operations.

Qualitative problems

As regards qualitative problems, in particular those relating to the content of education and to teaching methods, planning is designed to effect improvement and the association in their examination of what may be called the professional element (educationists and students of comparative education, educational research institutions and teachers' organizations) is essential. One of the best ways of doing this is to set up specialized working parties for each of the major problems at each level of education (curricula and syllabuses; teaching methods; textbooks; educational research; inspection), while problems common to all levels, such as the structure and interlocking of the educational system, should be dealt with by a commission made up of the most distinguished of the specialists on the committees mentioned above. In this connexion, one of the most useful tools for providing fuller data and suggesting new possibilities is comparative education.

Quantitative problems

The quantitative problems are determined statistically and long-term forecasts are worked out by calculating totals with extrapolated values, in particular from general and school population data and each country's individual moduli or ratios (pupils per teacher, pupils per classroom, teachers per supervisor, cost of instruction per pupil at each level and in each branch, cost of training per teacher per supervisor and per administrator, cost of material per pupil, etc.).

Methods of estimating needs

One of the methods which can be used is the following:

(a) Estimate the probable total population in ten or 20 years' time. Then calculate the population for each year by logarithmic interpolation.

(b) Estimate the number of children, young people and adults to be educated. In this calculation the factors are the following: (i) total length of schooling; (ii) proportion of population in school to the whole; (iii) the effective number of places which have to be provided in educational establishments; (iv) present effective enrolment; (v) mean annual increase in enrolments.

The two calculations above provide the basis for determining the number of children, young people and adults to be educated during the currency of the plan and over a longer period (say ten or 20 years).

(c) Estimate requirements in teaching, supervisory and administrative staff.

The figures for teaching staff are worked out on the basis of the pupil/teacher ratio for each level and branch of education. The figures for the existing situation, where the possibilities of more rational redistribution usually need investigating, are then increased by the amount necessary to cope with the foreseeable increase in enrolments. Thereafter a calculation has to be made of the numbers of teachers required to replace the percentage leaving the service for all causes, at their own choice or not.

The estimated total requirements in teaching staff provide the basis for working out the additional numbers of lecturers needed in teacher-training institutions to carry out the programme. This is done by working out the number of students teacher-training schools will need to be able to enrol, with due regard to the accepted student/teacher ratio, the possibilities of in-service qualification programmes for uncertificated teachers, and total requirements in teaching staff calculated as in section (b) above.

The numbers of supervisory and administrative staff needed are calculated on the basis of optimum teacher/supervisor or teacher/administrator ratios, as appropriate.

(d) Estimate the material requirements for the plan. Once the staffing needs of the plan have been studied, the next step is to consider the material requirements, which include:

(i) buildings for schools and other educational institutions; (ii) school equipment, including furniture and teaching aids; and (iii) textbooks.

It would take too long to set out in this paper the procedure to be adopted to estimate each category of material requirements. Let it suffice to say that there are already well-developed techniques for the planning of school building works, covering siting, premises, standards, etc.

(e) Costing of the plan. In costing the plan, a distinction is made between: (i) running costs and (ii) capital investments.

(i) Running costs: The most practical method of estimating running costs is to work out the cost per pupil and multiply it by the total expected enrolment at each level and in each branch of education.

Cost per pupil depends on teachers' salaries, the teacher-pupil ratio and miscellaneous direct charges (amortization and maintenance of premises and school equipment, social and health services, etc.).

To this total are added running costs for administration and inspection and teacher-
training costs, calculated, per teacher for each level, on the basis of the salaries of teacher-training school lecturers, the student/lecturer ratio, cost of premises, equipment etc.

(ii) Capital investments: Estimates of capital investment cover: (a) school building operations (new buildings, extensions, improvements); and (b) equipment (machinery, furniture, teaching aids).

- All costings are worked out on the basis of the price indices obtaining at the time the plan is drafted, and accordingly require periodical revision as prices, salaries, etc. vary.

Calculation of overall requirements in manpower and qualified personnel.

The assessment of the overall requirements in manpower and qualified personnel is one of the most important items at this stage of planning, to keep the draft in line with the real needs and possibilities of the economic development plan, to give a sounder idea of how to alter the structure and content of education, and to determine the priorities in the work plan. The procedure for this is as follows:

(i) Extrapolation of requirements in labour and qualified personnel for the next ten years at least and the next 20 years if possible. This estimate is subdivided according to employments and the respective levels of education they call for.
(ii) Estimation of prospective numbers of school and college leavers, per year and per level of education, including primary and secondary school teachers.
(iii) Examination of the possibilities of accelerated and emergency training (in-service training and qualification).
(iv) Calculation, from the results of (i), (ii) and (iii) above, of the long-term increase in enrolments necessary for each level and branch of education.

Presentation of the results

Once determined, needs and problems should be classified according to:
Where they occur in the educational system;
Whether they are short, medium or long-term needs;
Their precedence or urgency (educational priorities);
The treatment of each problem should show:
The main reasons why a change is considered necessary;
The possible alternative steps to be taken;
The experiments or studies that should be carried out before any change is carried into effect.
The educational pyramid aimed at as the final result should be plotted, worked out on the basis of the length of schooling at each level of education, the percentages carrying on from one level of schooling to the next, and percentage distribution per branch of education.

Preparation of the draft plan

The draft plan follows from the preceding stages of the work. The outline for a plan may be suggested as follows:
(i) Introductory remarks on the plan's antecedents and the method followed;
(ii) Explanation of the government's main objectives and educational policy;
(iii) Explanation of more detailed objectives, with indications of approximate figures per level and branch of education and criteria for future evaluation;
(iv) Explanation of how and where the education plan fits in with the economic and social development plan;
(v) Detailed description of the projects, programmes and activities in view, with a brief introductory outline of the existing situation and long-term needs, and notes on the finance necessary;
(vi) Description of the methods and means it is proposed to use for executing the plan, with notes on the procedures and machinery for supervision and correction.

At this stage in the preparation of the draft plan, it is necessary for those responsible for educational planning to work as a close-knit team with those in charge of economic planning discussing the draft systematically and in detail until agreement is reached on the priorities to be laid down before the funds to be provided for the education plan are decided.

Drafting the plan means formulating an educational policy with a programme and budget for the achievement of certain short and medium-term educational objectives within the framework of the major long-term objects. The plan should further indicate the administrative and financial measures necessary for its execution.

Priorities

As man-power and economic resources are limited and there are certain ineluctable requirements for economic development, priorities have to be established in each chapter or programme in the draft plan, so that the work can be spaced out according to the resources ultimately allocated to its implementation. Priorities for finance are the simplest and perhaps the most realistic way of considering the relationship of education to general development. The two major questions arising are: (1) What percentage of the national income can and should be set aside for education, observing that currently this percentage varies according to country from 1% to 7%? (2) How should the education vote be divided between the various levels and branches?
The final decision on the percentage of the national income to be given to education is generally a political one based on a choice of recommendations from the economic and educational planners, who are under a duty to demonstrate which solutions are the most suitable and will be most productive economically and socially, and the incompatibilities and consequences of possible decisions in relation to the sum of the objects of the national development plan.

Perhaps the most crucial problem facing planners is the allocation of relative priorities between the various levels and branches of education.

In this connexion, it is instructive to cast a glance at past history. For a long time education was the exclusive prerogative and responsibility of the family. Later it passed into the hands of religious orders and communities. The Middle Ages saw the rise of the senior colleges and universities, which influenced and directed the whole educational system of their age. At this period, the university could claim indisputable priority to match the selective and caste-bound society of the day.

Later on, democratic pressures combined with increasing State intervention produced a giddy rise in the importance ascribed to primary education, to the point of its being made universal, free of charge and compulsory in the constitutions and legislation of the majority of peoples, so that the task of extending the benefits of education passed into its hands and it conditioned and largely influenced the whole educational structure.

But as science progressed and technology was developed to improve living standards or for war-like ends, there was a rapid corresponding increase in the importance of technical and vocational education, which became the chief objects of the care and attention of economists and statesmen. However, economic expansion calls for progressively higher and more varied qualifications but with a background of sound general education, because it needs a labour force and qualified personnel who are adaptable, and can easily change their fields of activity. It is remarkable how this is increasing the importance attached to secondary education, no longer merely in its conventional role as a required course of preparatory studies for the university but as a polivalent general education which will enable people to adjust to an evolving situation and fill the very large number of posts necessary at the intermediate levels. This is a direct consequence of the realization that a modern nation does indeed need, is a sterile effort, with all of it, in most cases, forgotten within a few years; it is accordingly a waste in human and financial terms.

Consultation and adoption of the draft plan

The most notable features of the proposed second phase are as follows:

(a) Publicity. If the draft plan is to serve its purpose and to be understood and accepted, arrangements must be made to publicize it as widely as possible, using the most effective publicity media of every description.

There are cases, too, when its publicizing cannot be limited to the confines of the nation but must extend to other countries and to international organizations in order to obtain the advantage of the widest possible range of views and to secure whatever economic and moral backing is sought of them. After the technical work represented by the drafting of the plan, participation by the general public is rendered more effective, but will be forthcoming only if the plan’s proposals are made widely known.

(b) Participation by the general public. The objects of plans are social improvements, for which it is necessary to win the understanding, support, interest and acceptance of the general public, but unreadiness for the idea and inadequate cultural background among large sectors of the country’s population, vested interests, or lack of understanding of the problems and importance of education may all militate against this. These are the points to be investigated and made clearer in the second phase of planning. The publicizing of a plan must have as a concomitant intelligent opinion moulding propaganda. Machinery for public participation must be planned and there is a need for national seminars, and meetings, conferences, committees, etc. at national, provincial and local community level and in educational institutions. Before a plan is put into operation, steps must be taken to ensure public co-operation by respecting rights and establishing obligations.
The adoption process can be outlined as follows:

1. Circulation for approval;
2. Measures towards adoption:
   (a) Public participation and support;
   (b) Provision of finance for the plan;
   (c) Amendment of legislation which conflicts with the objectives of the plan;
   (d) Reorganization of ministerial departments necessary for carrying out the plan;
   (e) Training of the staff required for the execution of the plan.
3. Final adoption:
   (a) Concurrence of national and international authorities;
   (b) Concurrence of official entities;
   (c) Concurrence of leading individuals, private associations, representative groups and the press;
   (d) Legislation for the adoption of the plan.
4. Execution and revision of the plan

The executory phase or implementation of a plan is as active as any of the other planning phases. Although admittedly the main responsibility for execution falls to the educational administrators proper, the planners also have functions. As far as they are concerned, the features of this phase are the following:

(a) Supervision. The measures to be taken having been laid down in concrete and detailed terms, it is for the planning services to supervise execution and investments and working procedures; otherwise they cannot be held responsible for the degree of success the plan achieves. Their functions in this respect are exercised in co-ordination with the administrative services through technical counselling and constant supervision of operations, provision for which should be explicitly embodied in the legislation on planning procedure and media.

(b) Timing of operations and revision. The third phase should be geared to a time-table of operations and any necessary revision laid down in a work programme and budget. The programmes are annual, coinciding either with the calendar or the financial year, and are broken down into monthly, quarterly or half-yearly time-tables which facilitate the co-ordination and supervision of the work. Thus planning, as an attitude or policy, continues to inform all activities in every phase. It is customary to name plans by the number of years provided for their execution. Although excessively short-term plans are to be avoided, very long-term plans are just as dangerous, since they increase the probabilities of error in the estimates; unforeseeable factors multiply with the passage of time, particularly in a civilization which, like ours, is changing rapidly.

The functions of the planning services during the plan's execution may be summarized as follows:

1. Prior experiments using
   (a) Pilot educational establishments
   (b) Pilot regional education plans
   (c) Controlled execution of specimen operations
2. Programme of execution
   (a) Annual time-table of operations
   (b) Annual, biennial or long-term investment plan
   (c) Monthly, half-yearly and yearly work programme
3. Counselling on the plan's execution
   (a) Technical counselling by appropriate specialists
   (b) Counselling by the Planning Office services
4. Periodical review of policies for adjustment to changing situations and imponderables
5. Supervision of execution of the plan
   (a) Prior authorization from Planning Office for starting a fresh operation
   (b) Supervision of investments
   (c) Educational advice
   (d) Administrative supervision
   (e) Balance-sheets of operations; quarterly and annual reports.

Evaluation of the plan and planning of its successor

This fourth phase covers the termination of the plan and evaluation of the lessons learnt, and makes it possible for the succeeding plan to be more effective, comprehensive and realistic. The outstanding points in the fourth phase are:

(a) Evaluation criteria. To make sure that the evaluation is not arbitrary, it should be effected according to the criteria established on the plan's adoption. In other words, success should be assessed according to what was hoped for or aimed at in advance and not solely on the amount or quality of the results which may emerge in the end. One of the most valuable features of planning, as against a purely political programme, is that adjustment and flexibility are of the essence of the operation and do not mean failure, as is usually the case with any correction of a political programme. The evaluation determines what features of the plan have not been satisfactory and how they could be amended. It may be carried out annually, but an overall evaluation of results should in any case be made at the end of each plan.

(b) Follow up. This is a term with a very special meaning. It is part of the regular work of the
planning service and means the duty of keeping energy and keenness among those working on the plan at concert pitch. Without it there may be a gradual slackening off and loss of dedication through the growth of routine. Follow-up means preserving the same atmosphere throughout all phases and especially in the fourth phase, which marks the transition to the succeeding plan. It also involves maintaining the pace of work, the organization of the service, and co-ordination internally and externally.

(c) New objectives. Further planning consists in setting new objectives for a further term in the light of the processed results of the preceding plan and pursuing the same method of working. No plan is perfect or can solve all problems. Further planning means correcting previous defects and setting new objectives which will extend the original aims or develop some of them in a more practical form. Further planning is the best guarantee of continuity and objectivity and a necessity for constructive public administration.

The evaluation of results involves:

1. Striking a balance from:
   (a) Statistics
   (b) Yearly surveys
   (c) Reports
   (d) Study of the legislation passed in pursuance of the plan

2. Correction of the results through:
   (a) The pilot establishments
   (b) A regional pilot plan
   (c) The educational advisory centre
   (d) The documentation and information centre
   (e) The educational and vocational guidance service
   (f) The school architect’s service
   (g) The statistical service
   (h) The organization and methods (O and M) service

3. International co-operation in the evaluation:
   (a) Pooling of information and experience between countries
   (b) Evaluation of results at national level by international bodies
   (c) International meetings for the review and improvement of techniques and methods for the overall planning of education
   (d) Initial and further training of specialists in planning and related matters

The further planning operation is based on the survey and assessment of results and involves:

(a) Review of the previous main objectives of educational planning;
(b) Production of the succeeding education plan for a specified number of years as a follow up to its predecessor and to utilize new resources for the pursuit of new specified objectives.
V. TRAINING OF SPECIALISTS FOR EDUCATIONAL PLANNING

If they are to be able to achieve the objectives of overall educational planning, it is essential that those responsible for it be sufficiently knowledgeable about the methods and techniques of planning, especially the following matters:

Economic and social development: the theory and practice of economic and social development, with particular reference to the interrelations and interaction of education with economic and social development. Principles and procedures for co-ordinating efforts to promote the requisite integration of the development of education with the economic and social situation in the country concerned;

Education: needs and problems of the educational system as a whole and of each level and branch of education in the country concerned, and possible solutions advisable, covering both the quantitative and the qualitative or strictly educational aspects;

Administration and finance: contemporary principles and techniques of public administration as they relate to problems of (a) structure, (b) staff and (c) procedure. In addition, it is advisable for planners to have a command of certain auxiliary techniques belonging to the field of scientific work organization, such as O and M (organization and methods), group dynamics, etc.

Their knowledge of educational finance should cover programming and budgeting techniques, budgetary analysis, rationalization of costing and the financing of education from domestic and external sources.

The discharge of the planning function requires directing staff with a good grasp of the whole situation, administrative talent, knowledge of a wide variety of subjects and ability to take decisions. In the specific case of educational planning, it is highly desirable for the directing staff to have had previous connexions with teaching and the administration of education.

In addition to the directing personnel, consideration has to be given to the collaboration of specialists in the various fields necessary for educational planning, with due regard to the exact contribution which each specialized field can and should make in the preparation and drafting of short and long-term plans. For instance, specialists in educational statistics, in educational documentation and information, in educational research, in school building, in the training of inspectors and teaching staff, etc. are all needed besides experts on each level and branch of education.

Hence the necessity for a distinction between training programmes for directing personnel and for personnel responsible for the auxiliary services.

The training programmes for those in charge of educational planning must be designed as post-graduate courses, whether they are for in-service instruction or to train prospective planners. In-service training programmes should be brief and arranged as required - courses lasting one to three months, seminars or round tables on specific subjects; short courses on particular aspects or techniques.

As regards training programmes for prospective directing personnel, 12-month academic courses are advisable, to consist of combinations of subjects available at a university or in specialized institutions which students can attend. Subjects selected should cover the three fields specified at the beginning of this section, i.e. content of programmes (actual education), administration, and economic and social development. The course should also include a period of practical work.

For the specialists needed for the kinds of work incidental to educational planning, many countries have institutions providing regular courses and, in addition, Unesco has experience with regional courses on educational statistics for planning purposes, educational documentation centres, school building programmes, school inspection, and curricula and syllabuses, etc.

Unesco's experiments and projects with regard to the training of planning specialists to date are as follows:

Inter-American Training Course on Educational Planning. OAS, with Unesco's technical cooperation, and the collaboration of the Columbia Government, October-November 1959, Bogota;

A four-month course arranged by the Institut d'étude du développement économique et social (University of Paris), with Unesco's cooperation, which began in January 1961;

Regional training course for educational planners, administrators and supervisors for African countries, held in Khartoum (Sudan) during the second half of 1961;

Courses at national level in educational planning, arranged in Argentina, Ecuador, Spain, etc.
Organization of a regional centre in New Delhi for the training of educational planners and administrators for the countries of Asia, beginning in 1962;

Organization in Beirut (Lebanon) of a regional centre for the training of planners, administrators and supervisors in the Arab countries, beginning in 1962.
ANNEX I

INTER-AMERICAN SEMINAR ON OVERALL PLANNING FOR EDUCATION
(Washington, June 1958)

ORGANIZATION, METHODS AND TECHNIQUE OF OVERALL PLANNING FOR EDUCATION

ORGANIZATION OF OFFICES OR SERVICES FOR OVERALL PLANNING

The Inter-American Seminar on Overall Planning for Education RECOMMENDS as follows:
1. The ministry or department of education, or the appropriate government agency, should establish a service specially responsible for the overall planning of education and directly subordinate to the minister or the corresponding official;
2. To the degree required by each country's administrative machinery, similar planning services or committees should be established at the regional or local level, closely co-ordinated with the national service;
3. In the national plan, this service should have the following functions:
   (a) Preparation of the preliminary and final plans needed in the various phases of planning.
   (b) Conduct and co-ordination of the various forms of research required for planning.
   (c) Organization of consultation to ascertain public opinion and encourage the participation of the public in the planning process.
   (d) Provision of technical advice and guidance regarding the preparation and execution of all phases of the plan; of an opinion on any proposal affecting its development; and of advice to the appropriate bodies, regarding the preparation of education budgets.
   (e) Co-ordination of the participation, by the various departments or sections responsible for education, in the planning process; co-ordination of their work with that of other national planning agencies; planning the co-ordination of educational services with other government services; co-ordination of their activities with those of international organizations and with the technical assistance provided by other countries; and
   (f) Evaluation of the results of the plan and periodical revision of it.
4. To enable the service to perform the aforesaid functions, it should have at its disposal:
   (a) Sufficient technical and administrative personnel, including, at least, specialists in education with a good knowledge of planning techniques, specialists in school statistics and educational research, public relations, administration, the various branches of education, and educational documentation, and advisers in financing, school architecture, and legislation.
   (b) Sufficient funds in the education budget to ensure the operation of the national planning service, and the possibility of using them with maximum flexibility; and
   (c) Facilities for the pre-service and in-service training of the specialists required for the service.
5. For the organization of the service for the overall planning of education and for the development of its functions, the fullest possible use should be made of the services responsible for school statistics, educational documents and information, educational and vocational guidance, school supervision, and research and experimental centres, etc., in the country, co-ordinating or re-modelling them for purposes of planning.
6. The directors of the planning service should be national specialists who, as far as possible, have the following qualifications: experience in educational problems; technical knowledge of planning; experience in education and the administration thereof; knowledge of comparative education; mastery of the principles and techniques of research; and familiarity with the social, economic and cultural problems of the country.
7. Both individual countries and international organizations should give preference in their technical assistance programmes to projects connected with the overall planning of education.
8. When the organization of planning services is undertaken, consideration should be given to working papers 4 and 5 submitted to this Seminar.

TRAINING AND SELECTION OF SPECIALISTS FOR EDUCATIONAL PLANNING

The Seminar

RECOMMENDS as follows:

1. The sponsoring organizations of the Seminar, the Organization of American States (OAS) and Unesco, with the co-operation of interested
governments, should organize, as soon as possible, courses for the training of specialists in overall planning for education.

2. To fill the various posts in the planning services, rules for selection should be established, based on those given in document 5 of this Seminar, and the Director of the Planning Service should be made responsible for their enforcement.

ORGANIZATION OF THE WORK OF PLANNING

The Seminar

Bearing in mind the experience of the American countries, and the concept and objectives of overall planning for education adopted by the Seminar, submits the following suggestions to Member States:

A. Phases of planning

The work of planning should include the following phases:

I. Drafting of the proposed plan
II. Consultation and adoption
III. Execution and revision
IV. Evaluation and further planning

B. Preliminary activities

Planning work involves such preliminary activities as:

1. Formal establishment of the technical service responsible for directing the overall planning of education.
2. Determination of the major aims of planning, bearing in mind considerations such as:
   - What is considered to be the function of education for the cultural, social and economic development of the country?
   - How far are the educational services qualitatively and quantitatively adequate to meet the educational needs of the country?
   - How far is it possible to make changes or improvements that will meet the educational needs of the country?
   - What changes or improvements should be made in the educational legislation now in force?
   - What is the economic capacity of the public and private sectors to finance the extension and improvement of educational services in such a way as to meet the educational needs of the country?
2. Preparation of a work guide that will give in detail the goals of planning, its requirements, and the exact procedure that those responsible for carrying it out should follow.
3. Preparing the launching of an intensive preliminary information campaign by means of consultations, meetings and publicity, designed to arouse national interest and the participation of public opinion, in accordance with the democratic nature of planning.
4. Determining and co-ordinating the elements, procedures and techniques of planning in its various phases.

C. Basic elements of planning

Planning affects the following aspects of education:

(a) Qualitative
(b) Quantitative
(c) Administrative
(d) Financial

D. Planning procedure

Planning is carried out in accordance with the following procedure:

   Phase I. Drafting of the plan

This phase of planning consists of the following stages:

Survey of current cultural, social, political, economic and financial conditions.
Survey of the educational situation.
Determination of educational needs and problems and formulation of possible solutions.
Formulation of the draft overall plan for education, with indication of its objectives and means.

The survey of current cultural, social, political, economic and financial conditions should cover aspects that bear on education. In addition to the conduct of new research on the subject, previous research should be turned to the fullest possible account by assembling reports thereon for purposes of evaluation.

The survey of the educational situation should cover the following aspects, qualitatively and quantitatively: the aims and results of education; its administration; syllabuses and curricula; teaching, supervisory and administrative staff; the student body; teaching material; school buildings; and the financing of education.

Educational needs and the qualitative and quantitative problems that should be dealt with by short, medium or long-range plans are determined in the light of these surveys and with due regard to the major planning objectives mentioned above.

Once the educational needs and problems have been determined, they should be classified according to: (a) the points in the educational system at which they occur; (b) their degree of priority; (c) whether they are of short, medium or long range.

The following points should also be dealt with:

(a) the main reasons why a change is considered necessary;
(b) the possible steps to be taken; and
(c) the experiments or studies that should be conducted before any change is carried into effect.
The preliminary Overall Plan for Education will be formulated on the basis of the foregoing procedure.

The preliminary plan should include the formulation of an educational policy with short, medium and long-term objectives and should also provide for:
The expansion and improvement of educational services at all levels.
The reorganization of the educational system.
Revision of syllabuses and curricula.
The training of teaching, supervisory and administrative personnel, in the light of the new syllabuses and curricula.
The establishment, or the expansion and improvement, of all types of guidance services.
The improvement of teaching methods.
The development of social services for schools.
The establishment of pedagogical standards for:
(a) textbooks; publications and audio-visual aids;
(b) furniture, equipment and other school supplies;
(c) school premises.
The orientation and encouragement of pedagogical research and training.
Co-operation with cultural bodies.
A detailed study of the administrative and financial measures needed to implement the plan.

Phase II. Consultation and adoption of the plan

This phase requires the fullest possible participation and support from the public; decisions as to the granting of financial resources; revision of legislation in conflict with the plan; the requisite administrative changes; and the training of the staff needed to carry out the plan.

During this phase the plan must be widely publicized; public opinion surveys should be conducted, and meetings, lectures and seminars should be held to ensure the participation of interested groups and individuals.

When the plan is presented to the competent national service, it should be accompanied by a summary of the opinions of national authorities, international organizations, private associations, representative groups and the press.

This phase will conclude with the adoption of the plan by the competent government authority.

Phase III. Execution and revision of the plan

This plan should be carried out according to a precise schedule, covering practical targets, budget estimates and detailed work programmes.

During the execution of the plan, experiments and tests should be conducted to ascertain the efficacy of certain solutions; the plan should be evaluated by means of experimental and demonstration pilot centres, institutions or regions.

During this phase, planning services will provide technical advice on the execution of the plan. These services will give their opinions beforehand on measures to be taken affecting the plan, and on the orientation of teaching, the proposed outlay and administrative arrangements.

During this phase, frequent evaluations will be made in order to revise details of the plan and adapt it to unforeseen circumstances.

Phase IV. Evaluation and further planning

In addition to the evaluations made during the execution of the plan, an evaluation of the total results should be made at the end, on the basis of the criteria laid down during its preparation.

It is advisable to seek international co-operation with a view to supplementing the national evaluation of the plans. It would be well to establish comparisons between the results obtained in the various countries for the purpose of perfecting methods and profiting from the exchange of experience.

Further planning. Finally, a beginning should be made with the preparation of the next education plan, covering a specific number of years and based on the evaluation of the results and experience gained from the first plan and on a revision of its objectives. This further stage involves the adoption of a new plan, in the light of the results achieved by the previous one and of new circumstances and opportunities.

HANDBOOK ON THE ORGANIZATION OF PLANNING

The Seminar,
Having regard to the foregoing suggestions and considering the importance of adopting effective working methods for the overall planning of education, and the advisability of publicizing the experience and results obtained in countries where educational planning systems are used,
RECOMMENDS to the Organization of American States (OAS) and to Unesco:
1. The publication of a handbook on planning organization and procedures, containing information on the best methods of organizing services and carrying out the tasks involved in educational planning.
2. The preparation of information and technical publications on the most important aspects of planning and on the results and experiences of the Member States in this field.

EDUCATIONAL STATISTICS IN PLANNING

WHEREAS:

The problems arising in the various American countries with respect to the organization and operation of statistical services and the preparation and presentation of data are caused by:
1. Failure to give due importance to educational statistics.
2. Inadequate organization of national educational statistical services.
3. Lack of co-ordination between educational statistical services and other statistical agencies.
4. Failure of decentralized or autonomous statistical agencies to send information to centralized institutions.
5. The "non-comparability" of national and international statistics on education.
6. Dearth of technical personnel.
7. Lack of suitable technical handbooks and guides and of other facilities for the exchange of experience.

Whereas these problems make it difficult to prepare educational plans on an objective basis; and

HAVING REGARD TO

The recommendations of the participants in the Latin American Course on Educational Statistics

The Seminar,

STATES:

1. With respect to the importance of educational statistics
   (a) Educational statistics should be regarded as an essential prerequisite for the overall planning of education.
   (b) Educational statistics should be given due attention when programmes are prepared for the extension and improvement of national statistics.
   (c) Importance should be attached to the international exchange of educational statistics.
   (d) National and international specialized courses in educational statistics should be organized; and
   (e) In training centres for teachers and educational administrative personnel, courses in educational statistics should be established if they do not already exist, and such courses should be made compulsory.

2. With respect to the improvement of national educational statistics services at all administrative levels
   (a) Educational statistics offices at all administrative levels should be given the importance due to them as vital agencies in educational planning.
   (b) The services responsible for compiling and analysing statistical data should be rationally organized.
   (c) The services should be provided with competent technical and administrative personnel, selected in accordance with suitable procedures.
   (d) The services should be adequately equipped for the effective discharge of their functions; and
   (e) All agencies producing statistical data useful for the overall planning of education should be urged to send them to the central offices at the appropriate time.

3. With respect to the co-ordination of educational statistics

The co-ordination of educational statistics through the establishment of an agency consisting of representatives of the institutions responsible for and interested in educational statistics should be encouraged in countries as yet without such facilities.

4. With respect to the comparability of statistical data on education
   (a) Encouragement should be given for the standardization of educational statistics, with due regard to the educational needs of each country and the suggestions of international organizations.
   (b) The standardization of educational statistics at the international level, taking into account the suggestions of specialists in this field, should be continued.

5. With respect to the training of technical personnel

Opportunity should be given for in-service training for personnel engaged in statistical work by arranging for them to attend national and international seminars and courses on educational statistics.

6. With respect to the preparation of guides and handbooks

It is important for appropriate guides and handbooks to be available for the teaching of educational statistics and as an aid to the efficient operation of statistical services.

7. With respect to the exchange and publication of information

The exchange and publication of information on educational statistics in the American countries should be promoted, by establishing and supporting an Inter-American bulletin on educational statistics, and, in the light of the foregoing statements,

The Seminar

RECOMMENDS as follows:

1. The governments of the American countries should attach due importance to educational statistics, which constitute a vital factor in overall planning for education.
2. In order to improve the operation of educational statistics services:
   (a) In co-operation with international organizations, standards should be established that will make educational statistics, at both the national and
the international level, comparable, useful and uniform, in the interests of standardization in the terminology, concepts, classification, tabulation and methods of compiling and tabulating data.

(b) The services should be provided with the necessary machinery and other equipment for efficient work; and

(c) Where no such arrangements have yet been made, all statistical activities in the field of education should be co-ordinated through a national agency consisting of representatives of the institutions responsible for and interested in educational statistics.

3. In-service training courses in educational statistics should continue to be organized at both the national and the international level; and

(a) The number of fellowships granted to specialists in the subject should be increased.

(b) The content of courses on the same level and with similar objectives should be standardized, so that fellowship students may receive similar training in each country; and

(c) A compulsory course in educational statistics should be established in all training centres for teachers and administrative personnel not yet providing any such course.

THE SURVEY IN EDUCATIONAL PLANNING

WHEREAS:

Periodic population censuses yield valuable information on social, economic and cultural changes occurring in the various countries.

Data concerning the educational level of the population and its relationship to other factors is required for overall planning for education, and such data are obtainable only from census returns. Census information is an essential point of reference for continuing educational statistics and for special sampling and other inquiries.

Many countries do not at present possess the necessary resources for carrying out special censuses on education (school censuses), and in view of the approaching American Census for 1960, c2. amount of schooling received by those who are not enrolled; level of education attained and reasons for leaving school or not attending;

c3. regarding those not enrolled; occupation and branch of activity.

2. Tabulations

(a) Simple

(a1. illiteracy; for the population between 15 and 24 years of age, by years of age;

(a2. educational level, by years completed at each level of education provided in the educational system of the country, for the population group from 15 to 24 years of age, by years.

(b) Combined

(In order to permit an analysis of the relationship between economic and educational factors, the basic classifications of the population should be combined with classifications by course, and highest grade or year completed by the individual, in the national educational system or the equivalent level.)

The most important combined tabulations would include:

(b1. total population, showing economic activity by sex and course, last grade or year of schooling completed;

(b2. economically active population, showing occupation, sex and course, highest grade or year of schooling completed;

(b3. economically active population, employed or not, classified according to sex and course, and highest grade or year of schooling completed;

(b4. school population by simple years of age, for the population group from 5 to 24 years of age, by level and type of education;

(b5. population not enrolled, classified according to simple years of age, for the compulsory schooling age group, showing years of school completed, occupation, reason for leaving school or not attending, and percentage of illiteracy.

THE SURVEY IN EDUCATIONAL PLANNING

WHEREAS:

Overall planning for education requires thorough examination of the quantitative and qualitative aspects of the educational situation, and of other relevant features of the social scene.

It is essential, for the purpose of planning, to have the fullest and most authoritative information on the views of the various sectors of society regarding the shortcomings and requirements of education and what its aims should be.
The Seminar,

RECOMMENDS as follows:

1. As part of the research required for the planning process, a series of questionnaires should be addressed to the various sectors of the nation, either directly to individuals, or through their organizations, seeking their specific opinions as to the positive and negative features of current education, both general and specialized, as well as the lines along which they would like educational services to develop.

2. These questionnaires should be prepared by specialists, in accordance with modern techniques, and when addressing them directly to individuals the co-operation of educational personnel specially trained for the purpose should be enlisted.

3. Special importance should be attached to the questionnaires addressed to teachers at all levels and to their organizations, whose opinions and co-operation are vital for the success of the planning process, and for the execution of whatever plans are adopted.

4. The conclusions drawn from the answers to these questionnaires should be made public, in order to promote an increasingly better-informed public awareness of the importance and complexity of the country's educational problems.

EDUCATIONAL DOCUMENTATION AND INFORMATION CENTRES

WHEREAS:

Educational documentation and information centres are of prime importance for research into the problems of education and for overall planning.

The Seminar,

RECOMMENDS as follows:

1. Educational documentation and information centres should be established in countries where they do not already exist.

2. In order that the best use may be made of the services of such offices, they should be attached to educational research institutions, ministries or secretariats of education, planning offices or educational museums.

3. In addition to carrying out their specific functions, these centres should assist in the task of educational planning by:

(a) Assembling and classifying the most important background material relating to the historical development of education in their country and the basic provisions governing the structure and development of its educational system.

(b) Collecting works and publications representative of the educational philosophy of the country and the educational doctrines and trends in other countries, and the most important classical works in the educational field.

(c) Collecting publications and studies dealing with questions having a bearing on the country's education, such as economic and social development, and its effect on the orientation and training of the teaching profession, and, in general, any statements reflecting the needs and aspirations of that particular society and affecting education.

(d) Co-operating in the task of leading public opinion, and particularly the teaching profession, to take an interest in educational planning, by means of publications on fundamental problems in national education, and the dissemination of information on similar problems in other countries and ways in which they have endeavoured to solve them.

4. In order to achieve the above aims:

A. With reference to personnel

(a) The personnel in charge of such services should possess as thorough an educational training as possible, a broad acquaintance with comparative education and special training in cataloguing techniques, and the organization and utilization of materials.

(b) Arrangements should be made for further courses for the training of specialists in educational documentation, similar to the one organized by the Ibero-American Bureau of Education as part of Unesco's Major Project No. 1.

B. With reference to organization

The following minimum services should be established in each centre to co-operate in the work of planning:

(a) Documentation service with the following sections:

   Book Library
   Periodicals collection
   Exchange of documentation

(b) Publications and information service.

(c) Reference service.

5. With reference to the work of the international organizations concerned with education

(a) The OAS and Unesco should pay closer attention to Latin American educational bibliography and issue bulletins on educational works published.

(b) Unesco should publish a minimum annotated bibliography of easily acquired educational works, for the benefit of teacher-training centres.

(c) Encouragement and guidance should be provided for the exchange of documentation between ministries or secretariats of education in the Americas.

(d) Unesco's Education Clearing House should encourage or channel the exchange of documentation between the American countries and the rest of the world.
COMPARATIVE EDUCATION AS AN INSTRUMENT IN PLANNING

WHEREAS:

Studies in comparative education provide an invaluable contribution to educational planning, because, by revealing the close relationship between the general pattern of societies and their educational systems, they help in the reform of current institutions and practices and in making intelligent use of the experience of other countries, both positive and negative.

The Seminar,

RECOMMENDS as follows:

1. In the preparation of the various aspects of planning, comparative education studies should be conducted in order to turn to account the experience of other countries.

2. A more important place should be set aside for comparative education in the curricula and syllabuses of teacher-training centres.

3. Latin American educators should be afforded greater opportunities of specializing in comparative education, through national and international fellowship programmes.

4. In planning, consideration should be given to the comparative study on the educational situation in the countries of Latin America being prepared as part of Unesco's Major Project No. 1, and to the studies on different aspects of education prepared by the OAS.

5. Unesco, the International Bureau of Education, the OAS, the Ibero-American Bureau of Education and ODECA (Organization of Central American States) should continue and speed up their important work in the field of comparative education.

6. Future editions of the "World Survey of Education" and other publications on comparative education produced by international agencies, should include, in addition to descriptive and statistical information, an analysis of the historical, philosophical and social factors influencing national systems of education.
devoted primarily to psychological and sociological problems, problems of comparative education, or to the philosophy and aims of education, for such subjects bear on the overall planning of educational services, and these studies should be carried out by teams of specialists in the various fields.

3. The work of these centres should be co-ordinated with that of centres engaged in research into social and economic conditions, in order to make available to the service responsible for the overall planning of education the fullest possible information on all factors affecting it.

4. The curricula and syllabuses of teacher-training institutions at all levels should attach greater importance to the theory and practice of educational research and each country should take action to ensure the training of sufficient specialists in this field.

5. The adaptation or preparation of handbooks on educational research methods, the exchange of research materials (tests, surveys, etc.), the dissemination of educational information and the publication of an Inter-American journal or bulletin for this purpose, should be promoted.

6. The exchange of research workers within each country and between countries should be encouraged and seminars should be held periodically to permit the exchange of ideas and experience among research workers of the American hemisphere as a means of improving current research methods and techniques.

7. In the selection of problems to be investigated, consideration should be given to the following criteria:
   (a) Their direct and practical importance in the overall planning of education.
   (b) They should lend themselves to immediate research and the objectives and scope of the research should not put an undue strain on available human and material resources.
   (c) They should be justified on the basis of their short, medium and long-term results.

8. The aims of the research to be conducted should be:
   (a) Careful study of research already carried out and of the methods, concepts, techniques and terminology of educational research, without which teamwork is impracticable.
   (b) Raising of the level of educational research and revision of its theoretical basis, in order to increase its effectiveness as regards the selection of problems for study, the precision of method and presentation of results.
   (c) Close co-ordination between research for immediate application - which is the province of the experimental and demonstration centres and areas - and other aspects of planning, and basic research in the various educational sciences.

9. In accordance with the characteristics and needs of overall planning for education in each country, pilot or experimental and demonstration centres or areas should be established for trying out solutions to specific problems which arise as the plan is being carried out and for facilitating the general application of such solutions.

10. Such centres or areas should be given the necessary human and material resources and adequate supervision to enable them to attain their aims.

PARTICIPATION OF PUBLIC OPINION

WHEREAS:

Democratic planning requires the support and participation of public opinion,
The Seminar,

RECOMMENDS as follows:

1. Conferences, seminars, symposia, round-table discussions, etc., should be organized, in the capital cities and the provinces, and within associations representative of the various sectors of the national life, for the purpose of publicizing and discussing the most important aspects of planning and the educational problems of the respective countries.

2. The co-operation of public information media - newspapers, magazines, radio, cinema, television, etc. - and advertising agencies and enterprises which use their services should be enlisted in order to publicize the plan and its objectives, give an account of its progress, and discuss educational problems.

3. The planning service should regularly prepare short bulletins on the progress of the plan, designed for the general public and suitable for use by the various information media.

4. The public should be encouraged to play an increasingly active part in the implementation of the plan at the national, regional, and local level, with a view to ensuring the attainment of its objectives.

FUTURE DEVELOPMENT OF EDUCATIONAL PLANNING IN THE AMERICAS

The Seminar,

DECLARES:

That the future development of planning in the Americas depends upon:

1. The realism and feasibility of the plans adopted and their adaptability to the real educational needs of the country and to its political and administrative machinery.

2. The care with which the research required for the planning is carried out and the principles of planning are applied, rather than upon isolated methods or techniques.
3. The thoroughness with which public opinion is consulted and the effective participation of all its sectors, this being the only way to build up a national sense of responsibility that will assure the continuity of effort necessary for the attainment of the proposed objectives.

4. Wise selection of the technical personnel responsible for planning, who must be provided with the necessary means and granted the facilities appropriate to the administrative tradition of the country, so as to ensure effective co-ordination and advisory action on their part.

5. The understanding, support and participation of teaching personnel at all levels, from elementary to higher education, and of teachers' organizations.

RECOMMENDS:

That, to ensure the future development of planning in the Americas:

1. Governments

(a) Should take into consideration and put into practice the various recommendations of this Seminar, carefully adapting them to the characteristics of the country, and should encourage the participation of independent and private agencies able to contribute to the attainment of the proposed objectives.

(b) Should co-ordinate, for the purposes of overall planning for education, the technical assistance which they receive from international organizations, foundations and other governments.

(c) Should co-operate effectively with international organizations in the training of specialists in the various fields of education in which there is a need to extend and improve educational services.

2. International organizations

(a) Should take into consideration and put into practice the recommendations addressed to them by the present Seminar.

(b) Should promote the planning of education in the various countries, through technical assistance, the granting of fellowships and the provision of educational documentation and information.

(c) Should co-ordinate, both among themselves and with foundations and governments furnishing technical assistance, their work for the advancement of planning.

(d) Should organize, as soon as possible and with the co-operation of governments, the courses necessary for the training of the specialists required for planning.

(e) Should organize further Inter-American seminars on overall planning for education, within the next five years, in order to exchange experience and evaluate the results obtained.

INTER-AMERICAN CONFERENCE ON EDUCATION AND SOCIAL AND ECONOMIC DEVELOPMENT

The Inter-American Seminar on Overall Planning for Education,

In order to consider on a basis of adequate scientific studies, the relationship between education and social and economic development, the better understanding of which will be a valuable contribution to the effectiveness of overall planning for education,

DECIDES:

To support the proposal for organizing an Inter-American conference on education and social and economic development, to be preceded by a series of scientific research projects on the dynamic relationship between those aspects of the existing social situation, and

RECOMMENDS:

That ECLA, Unesco and the OAS, and the organizations, foundations and universities of the Americas interested in research regarding the existing social situation from the point of view of the interaction between education and social and economic development, should appoint a committee of experts in appropriate fields of study, with a view to preparing in detail the draft agenda and programme of the proposed conference and the plan of research to be carried out, and consider means of financing both the preliminary research and the conference itself.
ANNEX II

SYMPOSIUM ON EDUCATIONAL PLANNING, ITS ECONOMIC AND SOCIAL FACTORS
(Paris, December 1959)

under the joint auspices of
The Institute for the Study of Economic and Social Development,
University of Paris
The French National Commission for Unesco
The United Nations Educational, Scientific and Cultural Organization

FINAL REPORT

The general conclusions of the Symposium may be summed up as follows:

1. Education must face up to new problems. The present rate of development in science and technology, demographic expansion, the new volume of needs and social changes, the demands of an accelerated economic growth, all necessitate profound changes in educational systems. During past centuries, the principle task of education was to pass on to new generations the knowledge and techniques of the preceding ones, and their system of values. Today, it must at the same time make primary education available to all children, develop technical education in line with economic development, develop secondary and higher education, educate the adult population and at the same time prepare society as a whole for the economic and social changes of the years to come. The accelerated development of education, which is an economic, as well as a social necessity, calls for an even greater increase in funds in the underdeveloped countries than in the others at a time when their available resources are still very limited and needed for other equally urgent economic and social investment. In each country it is therefore necessary to choose, to determine the order of priority for education, and to revise the programmes, methods and structure of teaching.

2. The development of education must be subject to overall planning. Planning cannot take the same pattern in every country, but whether it assumes the form of decisions taken and enforced by a central authority or merely of forecasting needs and recommending solutions, it is in every case necessary that the development of education should be the object of a long-term global approach with precise stages and goals both qualitatively and quantitatively determined.

Planning must be comprehensive, continuous and formulated by a specialized agency having a qualified staff at its disposal, but, in order that the educational plan be understood and supported by public opinion, its preparation and implementation must be conducted by decentralized methods.

The meeting also stressed the importance of an effective administration so that the proposed reforms may be efficaciously carried out; it is advisable that care should be taken to improve the training of educational administrators and planners.

Educational planning can only indicate the global requirements (in teachers and in funds) of the envisaged reforms, fix the orders of priority, adapt them to the economic possibilities of the present and foreseeable future, orient education as a whole with economic, social and cultural change, adapt it also to the needs of employment, and allow sociologists to point out at the right moment the social factors which may act as a brake or, on the contrary, help progress. In all these stages (formulation, implementation, supervision, re-adjustment), educational planning must be the object of close co-operation between educators, economists and sociologists. Preliminary consultation between these groups is essential in this respect.

3. Methods of educational planning should in particular take account of methods of economic planning, both in calculating and reconciling the various estimates and in preparing the necessary statistics. Detailed suggestions were made (during the Symposium) as to the type of information which should be gathered, at the national and international levels, if education is to fulfil its rôle in the implementation of economic and social plans.

4. Planning must take special account of the factors peculiar to each country - the economic characteristics (importance of the agricultural sector, rate of industrialization, etc.), social, cultural and demographic characteristics (structure of the different groups, individual and collective requirements, etc.), and present and future economic and social changes. But international comparisons may furnish useful indications and examples. However, if there is no standard plan applicable for each country, national plans must also avoid rigidity, and be subject to periodic evaluation, checking and revision. Here again, constant co-operation between educators, economists and sociologists is indispensable.

5. Education must satisfy individual needs and at the same time those of society. Appropriate methods of vocational guidance based on precise forecasts in the field of employment, and on the analyses of sociologists and psychologists, should
facilitate the progressive adjustment of these needs to each other. On the other hand, each phase of instruction must have as its goal the preparation of youth, both boys and girls, to take an active role in the economy and more generally in society.

6. Particular attention must be taken to guard against school wastage, which is most prevalent in underdeveloped countries. Working in collaboration, sociologists must study the causes of wastage, economists determine its volume, and educators propose means to remedy it.

7. Underdeveloped countries should not merely copy the educational systems and methods of industrialized countries, which are too expensive and not adapted to their particular needs. It is therefore necessary, during a transitional phase, to make use of all appropriate means and resources, and preferably to employ national resources. The importance of female education, adult education, accelerated professional training, intensive teacher training, audio-visual methods, co-operatives and the training of agricultural instructors was stressed.

8. If it fulfils the above conditions, education may be considered as a priority investment, for it is an indispensable base for economic development. Education has also its own requirements and should form individuals capable of developing their personalities and of participating actively not only in the economy but also in community life. This is the general role of education, which should not be sacrificed for immediate economic gains. Also, education, if it is modified by economic and social changes, is in fact an essential factor in such changes; in analysing it from this angle, the sociologist must assist education to fulfil this role, and thus avoid costly errors.

9. Technical assistance must play an important part in this transitional phase of accelerated development: the methods which already exist - exchanges of students and teachers, donations of equipment, etc. - should be intensified.

Technical assistance should especially help the underdeveloped countries to formulate their education plans and to establish training programmes for each development project undertaken. Suggestions put forward included distribution of food to students, and international financial aid for educational development plans. The meeting, however, warned that care should be taken to ensure that this aid benefits mass education, and not just privileged groups.

The Symposium gave an opportunity of demonstrating the help which educators, economists and sociologists can give each other when working together. Undoubtedly their points of view often differ: educators ask for more funds than the economic situation permits, and often aim at an ideal solution without thinking about the practical considerations; economists ask more efficiency for a minimum cost; and sociologists ask to be consulted more often, considering that targets can be fixed only through team-work. However, the Symposium showed that the comparison of points of view opens the door to solutions. This co-operation between the three fields, which has not been sufficiently close up till now, must be continued in the future in order that education may respond more effectively to the economic and social demands of countries in process of development and that it may be based more on the findings of economists and sociologists.

The sociologists are right in recalling that society is a global phenomenon, of which education and economy are only partial aspects. The Symposium had the merit of underlining the interdependence of the three - educational, economic and social - factors, and this first meeting should be the starting point for further collaboration.
RECOMMENDATIONS

The Regional Meeting of Representatives of Asian Member States on Primary and Compulsory Education convened at Karachi by the United Nations Educational, Scientific and Cultural Organization, from 28 December 1959 to 9 January 1960,

Considering that educational planning, development and financing at the national and regional level must become an integral and essential sector of the overall economic and social development plans of each Asian Member State and of the Asian region collectively recommends that:

ADMINISTRATION AND SUPERVISION

In order to ensure the preparation of sound plans for universal compulsory primary education and their effective implementation, the administrative machineries in countries embarking on such plans should be adequately strengthened and geared to meet the needs in the following major areas of administrative functions:

(i) Planning (quantitative and qualitative aspects)
(ii) Execution (direction, supervision, coordination, organization and mobilization of resources for the supply of (a) school buildings, (b) furniture, equipment and teaching materials and (c) teaching and supervisory personnel and training)
(iii) Evaluation (including reporting)
(iv) Public relations

PLANNING

Special machinery for planning

It is absolutely essential that each State should create, as early as possible, a special machinery for planning and implementation of the programme of universal, compulsory and free primary education. The main functions of this machinery would be as follows:

1. To collect all the basic data required for the preparation of the programmes of universal, compulsory and free primary education;
2. To collect all the necessary data to show the extent and the efficiency of the educational provision made in the country from time to time;
3. To conduct research, experiments and pilot projects required for the programme;
4. To plan the necessary programmes for realizing the objective of universal, compulsory and free primary education and to implement them;
5. To evaluate the programmes being implemented from time to time and to make such adjustments in them as may be deemed necessary;
6. To make the members of the public, teachers and administrators plan minded and to associate them actively with the preparation of plans and programmes; and
7. To conduct educational propaganda for the plans that are being prepared and implemented with a view to securing the maximum possible cooperation from the public, teachers, administrators and others concerned with the programme.

Demographic studies

A variety of demographic data is needed for the preparation of programmes of universal compulsory and free primary education. This includes (1) statistics of the total population of the country, revised annually and kept up to date; (2) an accurate and efficient system of registration of births and deaths and certification; (3) a study of the birth and death ratios and fertility problem; (4) the detailed breakdown of the total population, according to each year of age, from one to 14; (5) forecasts of the growth of population, made for every fifth year at least for a total period of the next 20 years; (6) forecasts of trends of the movement of population; (7) geographical distribution of villages of various sizes, etc. It is, therefore, recommended that each State should set up, as early as possible, a suitable organization for the collection of all such data.

Establishment of statistical units

It is recommended that early steps should be taken in each State to establish or strengthen statistical
units for the periodic collection of all the necessary educational data and to staff them with properly trained officers. It would be of great advantage to the officers of such a unit in one State to visit some other States of this region to study the working of their units in situ and, therefore, recommends that such visits be encouraged by Unesco under its exchange programme or by suitable bilateral or multilateral arrangements between States themselves.

Co-operation of the public and teachers

In view of the importance of securing the public’s co-operation, it is recommended that the members of the public and teachers be more actively associated with the preparation of the programmes of compulsory primary education and that an intensive propaganda should be organized to enlist their maximum co-operation in their implementation.

Educational surveys

It is necessary to carry out educational surveys of each country in this region. The nature and scope of these surveys will have to be varied to suit local conditions in each country. It is, however, recommended that each State in this region should carry out the necessary educational surveys of their areas in good time with a view to preparing accurate and comprehensive plans for the development of compulsory primary education.

External assistance

Unesco and other agencies of international co-operation are requested to assist the Member States of this region to prepare plans for the provision of compulsory primary education in the following ways: (1) provision of expert guidance; (2) supply of equipment; (3) provision of training facilities including grant of scholarships and fellowships and (4) monetary grants. In particular, it is suggested that Unesco should organize as early as possible a Regional Training Centre in Educational Planning at a suitable centre in this area for the benefit of the Member States.

National plans for compulsory primary education

It is recommended that a detailed national plan for the provision of universal, free and compulsory primary education should be prepared by each State. These plans should be properly integrated with the general educational plans as well as with the overall plans for economic and social development. Unesco should offer all the assistance necessary for this purpose to such Member States as request it.

INTEGRATED AND BALANCED ECONOMIC AND SOCIAL DEVELOPMENT

The problem and solution at the national level

The major weakness to date in educational planning and finance in the Asian countries has been that the plans developed by Ministries of Education have been in timing and methodology, distinct and separate from those of the national development plans. This has been recognized by some countries and corrective action taken. Similarly the financial requirements of the educational plans have, in the past, either not been worked out with precision or and not been scrutinized and approved by the national planning and financial authorities of the country. In this matter of educational finance, a number of States in the region have set the correct example. It is therefore recommended that the national educational plans referred to above, should in every Asian country, be checked and approved by the national planning authorities, so that the timing and methodology of educational plans are consistent with the national development planning. It is also recommended that the financial requirements of each national educational plan, recurring and non-recurring, internal and external sources of financing, as set forth both in Section XIII and in the working plan, should be scrutinized, approved and integrated into the financial targets of the national development plans of each country. This would assure not only a co-ordinated and harmonious planning and implementation of the educational plan within the national development plan, but would also assure integrated and balanced economic and social development within each country. It is recommended that Member States in Asia take urgent action to carry out the above two recommendations. It is also necessary for the Unesco Secretariat to assist this process in each country and to receive a report on such integrated and balanced planning and financing from each Asian State, if possible, by the end of June 1960.

The problem and solution at the regional level

It is recommended that Unesco approach ECAFE and other appropriate United Nations bodies for establishing balanced and integrated economic and social development in Asia within which educational planning, development and finance will take their rightful place.
RESOLUTION

The Conference

Tasks requiring joint action

Considering that the Arab countries urgently need overall planning to raise their economic and social standards and that educational planning intended to develop human abilities, is an integral part of such overall planning, and

Considering that the problems of the Arab countries in this field are similar and interrelated,

Points out that joint action by Arab States may be undertaken as follows:

(a) Planning

(i) It would be desirable to establish, with the help of Unesco, a centre for the advanced training of senior personnel in the preparation, execution and continual adaptation of educational plans, within the framework of overall planning.

(ii) It is recommended that Unesco should, at the request of the governments concerned, help as far as possible to establish educational planning units in the Arab countries and grant fellowships for the study of the general principles in this field.

(iii) Unesco is invited to draw the attention of the United Nations, the International Labour Organisation and other organizations concerned, to the need for making a survey of manpower and skills required for the first stages of economic development in Arab countries.

(b) Documentation, statistics, research and educational studies

It would be advisable to establish, with the aid of Unesco, a common centre for the exchange of information necessary for educational planning.

(c) Educational policy

Seminars and periodical regional meetings should be organized to make comparative studies of the methods used and to determine ways of adapting education to the requirements of economic and social development.

Beirut, 9-13 February 1960
Critical problems of educational planning

It is recommended:

1. That precise estimates be made of requirements for high-level manpower;
2. That the following measures be adopted for absorbing the surplus of unskilled manpower;
   (a) that primary education be given a practical bias and be sufficiently developed and expanded so as to cease to be a contributory cause of migration from rural areas to the towns,
   (b) that all children who are capable of benefiting thereby be allowed access to secondary or technical schools as soon as practicable,
   (c) that living conditions in rural areas be improved by a vigorous attempt at country planning and community development,
   (d) that the system of land tenure and inheritance of real estate should be altered if necessary;
3. That governments establish priorities as between the different levels and types of education, in view of the dearth of resources, while maintaining the balanced development of these closely complementary levels and types of education and remaining faithful to the principle of universal, free and compulsory primary education;
4. That teacher training and the adaptation and reform of the content of education should be regarded as priorities, and that the principle of priority should extend to both qualitative and quantitative requirements;
5. That technical and vocational education and specialized training should be greatly developed in the African countries to keep pace with recent technological progress and development requirements, a proper balance being struck between general and technical education on the basis of objectively determined needs;
6. That in view of a marked flight from the teaching profession steps be taken to improve the status conditions of teachers both with regard to salaries and the standing of the profession;
7. That until such time as the African States have produced their own senior personnel, particularly at the top levels, the services of foreign experts and teachers and of training fellowships be planned for under bilateral and multilateral agreement;
8. That the latest techniques and teaching aids, which to some extent can offset the shortage and shortcomings of teaching personnel although they can never replace personal contact with the teacher, be used to the fullest.

The steps in the planning process

1. That an estimation of forward manpower requirements under the dual system of occupational and educational classification be undertaken by each country with the help of Unesco;
2. That a survey of the present anticipated annual output of graduates from educational institutions at the primary, secondary and higher levels be undertaken in each country with the help of Unesco;
3. That an estimate of future needs for imported high-level manpower by major occupational groups and by time periods be undertaken, bearing in mind the importance of making the most of the very limited resources of such personnel at present available;
4. That, as school education is not enough to ensure the training of certain types of manpower, employers share this responsibility under joint training arrangements by the State and private enterprise;
5. That an assessment of the long-range quantitative increases needed in education at the primary, secondary and higher levels in general and technical fields and teacher training be made by each country with the help of Unesco, as appropriate;
6. That a critical evaluation of the long-run qualitative changes needed throughout the educational system be undertaken by each country.

Machinery required for planning

1. That Ministries of Education establish adequately staffed planning groups responsible for the collection of statistics on education, the determination of costs of educational programmes, recommending reform and revision of curricula, planning of teacher recruitment and training, long-range forecasting of educational needs, research in new educational technology, and formulation of plans for the financing of education including the co-ordination of external assistance;
2. That countries establish, within a single Ministry or in the form of interministerial
commissions, manpower boards to assess present manpower resources and needs, forecast long-range manpower requirements, develop programmes for the education and training of manpower, formulate policy governing the importation of high level manpower, formulate social security measures in relation to national plans for economic and social development including the study of incentives.

3. That in all countries which have no planning ministry or boards, an interministerial commission be set up which will be responsible for the co-ordinated planning of economic and social development, reporting directly to the Prime Minister's Office. The representative of the Ministry of Education on the Commission should ensure that education is given its due place as a productive investment and as a basic factor in development.
We should like to draw the attention of our readers to the Unesco Coupon Scheme, which may enable them to purchase materials listed in this periodical. Because it is often difficult to send money from country to country for the purchase of books, films, laboratory equipment, etc., Unesco has created a sort of international currency, the UNESCO COUPON. These coupons enable schools, universities, teachers and students in many parts of the world to buy freely the materials which they need for study and research.

UNESCO COUPONS are on sale in most Member States which have currency restrictions. If you do not know where to obtain coupons, please consult your National Commission for Unesco or write to Unesco, Paris, for the information.

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For full details, please refer to the following explanatory leaflets:

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