

THE HIGHER EDUCATION LINKS SCHEME: REVIEW AND POSSIBLE FUTURE OPTIONS FOR HIGHER EDUCATION PARTNERSHIPS



**Final Report to the Department for International
Development by Terry Allsop, Paul Bennell and David
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DFID'S HIGHER EDUCATION LINKS SCHEME: REVIEW AND POSSIBLE FUTURE OPTIONS FOR HIGHER EDUCATION PARTNERSHIPS

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EXECUTIVE SUMMARY

1. *This Report, commissioned by the Department for International Development (DFID) evaluates the Department's Higher Education Links Scheme against its Public Service and Service Delivery agreements, and suggests options for the future in relation to the Scheme.*

Evaluation

2. *The central purpose of the Scheme, which has been running with little change since 1981, is to promote collaboration between universities in the UK and overseas by supporting visits of UK academics to overseas countries, and similar visits from them to the UK.*
3. *The Scheme supports capacity building in higher education institutions (HEIs) in developing countries. All approved projects now have objectives in one or more of DFID's priority areas.*
4. *The 400 plus Links currently supported, for an average of 3 years, cover a wide range of activities: the upskilling of staff, the development of new courses, the publication of research or teaching publications, and the organisation of workshops or seminars.*
5. *The distribution of Link projects is weighted towards partner countries with more HE capacity (and higher per capita income) than is DFID's budget generally.*
6. *The Scheme is a partnership scheme, costing the UK an estimated £10m plus per year. DFID's £3m per year budget meets only a proportion of the costs. Other costs are met by UK and partner HEIs and the British Council.*
7. *The Scheme has real strengths including: its capacity to mobilise resources from other sources (notably UK HEIs) towards DFID objectives; to promote innovative initiatives that evolve into broader programmes; to foster partnerships; to exploit and promote enthusiasm and goodwill in both UK and overseas countries' partner institutions; and to use all of these to transfer knowledge*

and skills from the UK to developing countries, and also in some measure from those to the UK.

- 8. Against these strengths, from the perspective of DFID, the Scheme also has a number of serious weaknesses. These include the lack of: any coherent wider plan or context for the particular project or intervention; any mechanism for ensuring its sustainability; sufficient focus on priority countries; or any systematic means of replicating best practice elsewhere on the basis of what has been found to have worked in previous projects.*
- 9. The strengths of the Scheme loom large in the perceptions of the UK university and British Council partners, the weaknesses in those of DFID officials. The former believe the Scheme fulfils a range of important roles at modest cost. Almost all the latter are clear that the Scheme is not effectively focussed on DFID's current agenda – the Millennium Development Goals and Public Service Agreement targets – and that, in its present form, it has outlived its purpose.*

Future options

- 10. Any consideration of a future Scheme should be in the context of an understanding of the importance of tertiary education to human development worldwide.*
- 11. We detect a growing recognition of this within DFID, and that it is time for a reassessment: for the development of a general strategy for building and sustaining the capacities of the tertiary sector in priority countries, in support of their achievement of the Millennium Development Goals.*
- 12. Any new Scheme to replace the Higher Education Links Scheme should focus on human resource or skills development in priority developing countries; be clearly within the framework of DFID's comprehensive strategy for such countries; seek to build on the HE Links Scheme's strengths and remedy the weaknesses noted above; and respond to clear demand and 'operational' support from partner Governments or country-based stakeholders.*
- 13. Any such Scheme should also recognise a number of key realities:*
 - Any partnership scheme will depend on different parties putting in contributions broadly commensurate to their stake and interest.*
 - Institutions in low-income countries are under immense pressure to train very large numbers of students, and to generate income from training, consultancy and research.*

Links need to be complemented by other more fundamental measures.

- *The success of any support arrangements depends on their sustainability. This may lead to concentrating efforts where the conditions for such sustainability exist, ie where there is an effective local infrastructure and the political will for reform.*
- *Any new scheme would only ever be one of a number of means by which DFID buys technical assistance for developing countries from UK HEIs and analogous bodies.*

14. In the light of these criteria, and recognising these realities, we have developed and consulted upon two possible variant successor schemes.

15. Option One would have all or some of the following characteristics:

- a. The Scheme would be based on the existing HE Link Scheme, but be more clearly aimed at support for pro-poor human resource development, to underpin achievement of one or more of the Millennium Development Goals;*
- b. The aim would be to enhance the capacity of higher education and other relevant institutions to train managers, professionals and other personnel who are directly involved in the provision of one or more specific key services to the poor (eg education, health, rural infrastructure);*
- c. The geographical focus would be tightened to align with DFID's Public Service Agreement for 2003-06;*
- d. The new Scheme would be a partnership scheme. The partners would be expected, as in the current Scheme, to contribute to its costs;*
- e. The Scheme might be extended to a wider network of collaborating institutions: further and higher education, training bodies and non-government organisations;*
- f. Greater emphasis would be placed on creating a framework or network of institution- to- institution links, with a view to long-term sustainability.*

16. Option Two - an alternative more focussed scheme - might have the following features:

- a. Resources would be aimed at supporting a few collaborative ventures between long-term twinned global partners, each with defined goals and an extended time horizon – 6 years or more;*

- b. *Support would be given in a priority country – probably one of the sub-Saharan African Low Income Countries – for the establishment, as part of government to government agreed strategy, of a leading Centre of Excellence for Skills Development in a particular priority field;*
17. *This approach is used by a number of like-minded donor countries (in particular, the Netherlands, Norway and Denmark).*

Conclusions and Recommendations

18. *From DFID's perspective, there are good arguments in favour of terminating the HE Link Scheme. However, something would be lost thereby in terms of the strengths of the Scheme, which we believe have the potential to contribute towards DFID's developing agenda.*

19. **We recommend that:**

- a. *The existing Higher Education Links Scheme should be terminated in its current form after the current 2003/04 round of agreed projects have been allowed to run their course;*
- b. *There is need for DFID to develop a wider strategy for the effective support of skills development and tertiary education institutions in low income countries, so as to promote and sustain pro poor growth and to meet the Millennium Development Goals;*
- c. *Within that strategy, and in support of it, DFID should develop a battery of effective approaches to mobilise the resources of tertiary education partners in donor countries;*
- d. *Options One and Two as outlined above are both potentially means of doing so. Option One has the advantage of supporting more innovative pilot approaches, which when tested could be rolled out more widely. It is also more likely to lever in significant resources from the partner institutions. It could be readily developed out of and in replacement of the existing HE Link Scheme;*
- e. *There should be provision within any new Scheme for the most promising and significant projects thus supported to be built upon to become Centres of Excellence, eligible for much more substantial support; but*
- f. *If DFID's resources for this purpose are limited to something like the current £3m per year, these should be made available for the wider range of potentially innovative projects*

under Variant One, rather than concentrated in just a handful of Centres of Excellence;

- g. DFID should seek to develop its wider strategy, and the details of a successor Scheme, in close collaboration with partners, including other UK Departments with a potential interest, starting with a national conference, and continuing with detailed consultations with partner countries and institutions on the specific elements of the new strategy, approach and partnership support arrangements.*

MAIN REPORT

A. Introduction

1. This report, commissioned by the Department for International Development (DFID), seeks to evaluate the Higher Education Link Scheme against DFID's Public Service and Service Delivery Agreements, and to advise the Department on possible future options in relation to the Scheme. Our terms of reference in summary were:
 - a. Taking account of previous evaluation reports, and in consultation with DFID and other stakeholders, to assess the extent to which the Higher Education Link Scheme contributes to DFID's Public Service Agreement/Service Delivery Agreement for 2003-06, and how the Scheme relates to DFID's broader support programmes; and
 - b. In the light of that, to advise on a range of possible options for a new 'Partnership Scheme'.
2. The Higher Education Link Scheme is long-standing. It has been running since 1981, and has changed little over that period. Its budget comes from DFID. Its management rests with a Committee for International Cooperation in Higher Education, consisting mainly of UK university representatives. The Committee is supported by the British Council, which has day-to-day responsibility for the Scheme. The Scheme has been evaluated a number of times over the past 20 years. We have drawn on those evaluations fully in this Review.
3. We have interviewed individually a wide range of senior officials in DFID, the Government's Chief Scientific Adviser, and three Vice Chancellors closely associated with the Scheme. We have had extensive meetings with British Council officials, and feedback and suggestions on our emerging conclusions from a wide range of DFID and British Council officers and Link coordinators in posts around the world, and from other key stakeholders, notably representatives of UK universities. We have also drawn on our personal knowledge and experience: two of us have extensive experience as consultants (one also as an education adviser) to DFID, including direct experience of a number of Link projects; the third is a former Under Secretary at the then Department for Education and Employment, with extensive experience of tertiary education support policies and programmes in the UK and overseas. A bibliography is at **Appendix I**.
4. It was outside our remit to visit Link partner countries. However, we have been given ready access to stakeholders both within and outside DFID for interviews, and substantial support in the analysis of data and the presentation of partner perspectives by the central British Council team that acts as managing agent for the Scheme. We are extremely grateful to all for their assistance, on which we have drawn extensively. But the views below are our own.

B. Evaluation of the Higher Education Links Scheme

Objectives and Priorities

5. The central purpose of the Higher Education Links Scheme is to promote collaboration between universities in the UK and overseas. It does so by supporting individual academics from the UK and overseas in getting together and spending some time together on collaborative research, teaching or related activities.
6. The emphasis has in the past been on general 'capacity building', on the basis that higher education institutions in developing countries have a valuable role to play in their countries' development. Links are agreed on the basis of proposals submitted for consideration each year. Those applying for each Link have to set out its specific objectives. Over the years, as DFID's objectives have become more clearly defined, the focus of the scheme has sharpened more towards priority countries and priority disciplines or fields of enquiry or other activity. All projects now have to fall within one of DFID's priority areas:
 - Promotion of sustainable livelihoods;
 - Better education, health and opportunities for poor people;
 - Protection and better management of the natural and physical environment; or
 - Managing globalisation in the interests of the poor; creating faster progress towards international development targets.
7. This is reflected in the way the Scheme is described in the foreword to the 2002 Higher Education Links Annual Report:

'A link is formed between at least two higher education (HE) institutions in a discipline relevant to their own, DFID and national government objectives. It works in the short term to enhance institutional capacity, establishing a sustainable means for the higher education sector to contribute in the longer term to the reduction of poverty and sustainable development within the overseas country'
8. The Scheme promotes and is based on partnership. DFID only meets a minority proportion of the costs: ie travel and some modest equipment costs, but no salaries, no major infrastructure, and only some subsistence costs. The main financial contribution is made in effect by the partner

higher education institutions, particularly in the UK but also overseas. The Scheme is run by the British Council, who charge for their UK HQ work but not for the significant work done by their field officers overseas. Given this sharing of costs, it is to be expected that the objectives of any one project - and in effect of the Scheme as whole - will be a compromise between the parties concerned. This is fundamental: it is discussed further at various points below.

Operation of the Scheme

Activities

9. **The Links are between individuals:** The Scheme is based on the commitment of individual UK academics working with a colleague or small group of colleagues in the partner institution. It is therefore essentially driven by the interests – research or otherwise – of such individuals. Too few resources are available within the Scheme itself on their own to deliver serious research or training outputs. The role of the Scheme in ‘leveraging’ much larger resources is therefore critical.
10. **The Links support a wide range of activities:** these include a measure of research; professional development training, seminars, workshops and courses in the host country; and more substantial post-graduate education for a much more limited number of overseas students in the UK. In 2000/01 the Scheme supported visits of on average 2-3 weeks per year to partner countries by 616 UK academics, and similar visits to the UK by 816 visitors. About a quarter of Links currently involve university departments that have low-income countries as a prime focus for study and research – eg the School of Oriental and African Studies, the Institute of Development Studies at Sussex, or the Centre for Development Studies at Swansea University.
11. **DFID officers** on the ground play almost no part in the running of the Scheme. It is no surprise therefore if Link projects often have little relationship to or impact on their country priorities.

The Spread of Projects and Applications

12. **Number of Links and countries:** the number of Links supported by the Scheme is considerable. There has been no central historic record kept over time; but the British Council estimate the total number of Links since 1981 as some 3200. The number supported at any one time has reduced by about a quarter - from 539 in 1993/94 to 404 in 2001/02 - as the Scheme has focussed more on the low income countries that need more funding support per project. Over the same period, the number of countries benefiting from the Scheme at any one time has increased slightly – from 40 or so in the mid 1990s to 45 today.

13. **Country coverage:** there is a broadly negative correlation between the overall level of DFID country support and the geographical distribution of Links. Thus, middle income developing countries get little DFID programme funding, but benefit significantly under the HE links Scheme: South East Asia and Latin America account for one third of all projects, Sub-Saharan Africa for 36% (but only 27% if South Africa and Mauritius are excluded). Countries that already have quite significant HE capacity, which enables them effectively to host Links, had 200 out of the 2001-02 total of 404 links: Malaysia 34, India 30, China 29, South Africa 25, Thailand 17, Egypt 16, Brazil 14, Mauritius 13, Mexico 12 and Chile 10. A summary of the current spread of Links by region and DFID priority is at **Annex A**.
14. **Application Success ratios:** the volume of applications each year has remained fairly constant - 244 in 2000-01, 367 in 2001-02, and 271 in 2002-03. On average 60-70% of proposals are approved, as are applications for extension beyond the initial period of 3 years. This is claimed to reflect the high quality of applications. But it does suggest that any further sharpening of the focus of the Scheme towards DFID priorities, with the existing distribution of costs, would risk the Scheme being underspent.

Costs

15. **Link budgets for individual projects:** DFID's £3m per year annual budget goes very largely to the payment of grants for the 400 plus current individual projects. On average, each Link costs between £7000 and £12000 per year. The costs per project have increased as a consequence of the increased focus of the Scheme on poorer countries, and in particular on sub-Saharan Africa. Most higher education institutions (HEIs) in these countries cannot afford to contribute financially. So, under a revised Project Memorandum for the Scheme designed to support those who need it most, the Scheme meets virtually all the costs in such countries. By contrast, Links in other countries like Malaysia often do not cost more than £5000 per year under the Scheme, because the partners are able to make a much larger financial contribution.
16. **UK HEI contributions:** UK HEIs used to contribute very generously to the HE Link Scheme in terms of staff time, support for visiting academics, fee and overhead waivers etc. Given the financial and competitive pressures on UK universities, notably to focus staff time on improving their departments' research assessments, there are increasing indications of their reluctance to make the same level of resource commitment. Even so, that contribution remains significant. Even if limited to the salaries of UK participants for the average of 2-3 weeks per year overseas noted above, plus a 50% on-cost for equipment and other overheads, we estimate that this would amount to some £6m per year, or double the DFID budget for the Scheme. In practice all will devote at least some time (and resources) in the UK on top of that.

17. **The Role of the British Council:** the British Council makes a considerable contribution to the running of the HE Link Scheme, both in coordinating the Scheme from the UK, and in their support for the preparation, consideration and monitoring of Link projects in the field. In the years up to 1994/95, when their work was fully charged for, the overhead was around 30%, rather than the 6% currently charged: 30% is probably a more realistic estimate of the true overhead for a very labour intensive scheme such as the HE Links Scheme.
18. **Overall cost:** The DFID budgetary allocation for the Scheme is £3m per year. This is but a small proportion of the total Departmental budget. But the total cost since 1989/90 exceeds £40 million. When account is taken of the contributions made by the UK partners – UK HEIs and the British Council – on the above basis, on a cautious estimate, the total UK cost of the Scheme is **some £10m per year**. This excludes the costs that fall on partner institutions in the developing world.

Impact and Effectiveness

19. Any assessment of the Scheme's impact has to start from the reality that Link **projects are in their nature small and local**: between one academic team and another. The time devoted by UK partners to them – even if there were no diversion to other objectives such as recruiting postgraduate students – is limited to visits of a couple of weeks or so per year. Previous evaluations have concluded that most projects were successful, and represented good value for money; and given that the Link grant may be seen as pump-priming, it is arguable that - as with blue skies research - even quite a low proportion of 'successful' projects would justify the Scheme.
20. We have had access to British Council data that suggests that the output of the many small projects, though individually small, is not negligible when taken together. On an extrapolation of 100 Link projects in a reasonable sample of 10 countries (for details see **Annex B**), this data suggests that the 400 plus projects operational in any one year could be expected to be associated with:
- a. The **upskilling** through short-term training, of some 1,000 'core' professional staff and 4,000 'second tier' Ministry or support staff;
 - b. 50-60 **overseas students** pursuing PhDs, MAs or diplomas in the UK, with support from other sources;
 - c. The development of 400 **new courses**;
 - d. The **publication** of some 350 research or teaching publications, training manuals etc; and
 - e. The organisation of 100 plus **large-scale workshops or seminars**.

21. At first sight these are encouraging figures: it would, for example, cost a good deal more than £3m per year for DFID to secure such outputs from a set of fully funded contracts. What is not clear, however, is:

- How substantial or long-term in impact was the upskilling of either the core or the 'second tier' staff: while attitudes and morale etc can be transformed through quite short immersion experiences, and this is a potentially valuable strand of the HE Links Scheme, it is likely that effective technical training would take somewhat more than a few weeks;
- How many of the overseas students here recorded were additional, and how many would have been enrolled anyway as result of existing or separate contacts between the HEIs concerned;
- How substantively 'new' or how long-lasting were the new courses; or
- How directly related to the Link were the research or teaching publications, which must in each case have required considerable time and effort outside the scope of the Link.

22. A more fundamental problem with assessing the impact of the Scheme is that the available data relates to interim, rather than final, outcomes: ie they are typically based on accounts of projects in progress and still being monitored by British Council officers. Once formally concluded, the projects are subsumed within other activities, and it is no longer possible to identify their separate and distinct continuing contribution. To assess the true value added of the Scheme, we would wish to have had evidence of how many of the Links:

- Established a new relationship, rather than supported an existing one;
- Secured the sustenance of those relationships, with what outcomes, and for what period beyond the DFID funding;
- Have become institutional partnerships beyond the ambit of the immediate academic team, and with resulting benefits in terms of the Southern institution's capacity and development; and
- Have spawned a research outcome, training programme or other activity that has had a significant impact on achieving one of DFID's priorities in the country concerned.

23. There are two key problems in obtaining such evidence:

- a. **Principle:** it is genuinely difficult to establish causal relationships between 'process' interventions of the kind supported by the Scheme and final outcomes in terms of Development Goals, as evident in the recent evaluation of DFID's research programme; and
- b. **Practice:** such evidence needs to be assembled by critical monitoring on the ground over a period of years. The only practical means of this is probably through DFID officers. But the

small sums involved in the Scheme, and the lack of involvement of DFID country offices in the Scheme (see above) mean that 'it falls below the sightlines'.

24. The net result is that there is no body of evidence as to which of the many thousand of Link projects over the past 20 years have been successful in terms of outputs and impact. So we have with regret concluded that we cannot go beyond para.20 above, and Annex C, by way of quantitative analysis.
25. There are however clear examples of Links that **have** had an impact: that from small beginnings have spawned wider programmes of considerable value. We include 10 of these by way of illustration at **Annex C**. Furthermore, while the HE Link Scheme has been too small scale to register on the DFID radar, it has promoted the sort of innovation that meets PSA Objective V: 'Develop evidence-based, innovative approaches to international development'; and has done so in ways that lever in a significant share of non-DFID finance - one of the indicators of success under this objective.

Summary Assessment of Strengths and Weaknesses

26. On the basis of our evaluation, we are clear that there are real **strengths in the HE Links Scheme**. These include its **capacity**:
 - a. To **mobilise resources from other sources**, notably UK Higher Education Institutions, towards DFID objectives: UK universities have enormous resources. If a proportion of them that would otherwise be focussed elsewhere can, by means of appropriate incentives, be focussed on DFID objectives, that is desirable;
 - b. To **promote initiatives that evolve into broader programmes**, such as networks of institutions with a common focus (eg on support for the delivery of basic education);
 - c. To **foster partnerships** that (at least occasionally) become embedded in the institutions concerned and self-sustaining;
 - d. To **exploit and promote enthusiasm and goodwill** in both UK and overseas countries' partner institutions; and
 - e. To use a-d to **transfer knowledge and skills** from the UK to developing countries, and also in some measure from developing countries to the UK.
27. But from the perspective of DFID there are also **serious weaknesses** in the Scheme, including:
 - a. The **lack of any coherent wider plan or context** for the particular project or intervention;
 - b. The **lack of any mechanism for ensuring the sustainability** of what has been proved through the Link, for it to work or to have wider application: the Links are essentially between individuals or teams;
 - c. The **lack of sufficient focus on priority countries**; and

- d. The **lack of any systematic means of learning** from what has worked in previous projects in order to replicate the best elsewhere.

28. The strengths of the Scheme as summarised above loom large in the perceptions of the UK university and British Council partners, the weaknesses in those of DFID officials. In summary, the UK Higher Education world, the British Council and certainly some partners overseas, all of whom contribute to the Scheme significantly as well as benefiting from it, believe the HE Links Scheme is fulfilling a range of important roles at modest cost. Almost all DFID officials on the other hand are clear that it is not effectively focussed on DFID's current agenda – Millennium Development Goals and the Department's Public Service Agreement targets - and that, in its present form at least, the Scheme has outlived its purpose.

C. Options for the Future

Context

29. As the second part of our remit, we were charged with considering possible options for a future scheme to replace the existing Higher Education Links Scheme. Any such consideration needs to be put in a broader context: a view on the role of tertiary education in the developing world. We believe this is admirably summed up by the opening words of the World Bank's latest review of tertiary education:

“Tertiary education is a critical pillar for human development worldwide. It is more than the capstone of the traditional education pyramid. In today's lifelong learning framework, tertiary education provides not only the high-level skills necessary for every labour market, but also supplies the training essential for teachers, doctors, nurses, civil servants, engineers, humanists, entrepreneurs, scientists, social scientists and myriad personnel”

(World Bank, *Constructing Knowledge Societies: New Challenges for Tertiary Education*)

Or as the World Bank report goes on to say (Executive Summary, page ix):

“ It is doubtful that any developing country could make significant progress towards achieving the Millennium Development Goals related to education ...without a strong tertiary education system...”

30. We share these views. In the course of this review, we have also detected a growing recognition within DFID of the importance of the tertiary sector to the development of partner countries, and an acknowledgement that this importance has been underestimated in the recent past. DFID devotes relatively limited funds to human resource or skills development beyond the basic foundations of primary and secondary education in the agreed priority countries. There is agreement that it

is time for a reassessment: for the development of a general approach or strategy for building and sustaining the capacities of the tertiary sector in developing countries, in support of their achievement of the Millennium Development Goals.

Criteria for any new Scheme

31. We start with proposing **five general criteria** for any new Scheme:

- a. The **focus should be on human resource or skills development** in priority developing countries;
- b. Any new Scheme should be clearly within the **framework of DFID's comprehensive strategy** for such countries;
- c. It should seek to **build on the HE Links Scheme's strengths** at para.26 above;
- d. It should **address the weaknesses** at para.27 above; and
- e. There should be **clear demand and support** from partner Governments or country-based stakeholders.

32. Any such Scheme would also need to **recognise a number of key realities**:

- The **Issue of Incentives**. Any successor scheme will either be a more or less fully funded contract-type scheme, in which case it is likely to be subsumed within one or more of DFID's existing programmes of support; or else depend on a partnership approach in which different parties put in contributions broadly commensurate to their stake and interest.
- That means that each of the partners must see what is in it for them: they must be motivated to enter into such partnerships. Developing and **sustaining a spirit of partnership**, based on an understanding of the incentives for participating in any future scheme, will be critically important.
- **Partnerships with tertiary education institutions in developing countries**: such institutions in low-income countries are under immense pressure to train very large numbers of students, and to generate income from training, consultancy and research. Links, as currently constituted, may be highly motivating for the limited number of academic staff in such countries who are able directly to benefit from them. But they need to be complemented by other more fundamental measures, if they are to support survival strategies of academics or of their struggling institutions in low-income countries.

- **Conditions for Success:** the success of any support arrangements depends on their sustainability. This may lead to concentrating efforts where the conditions for such sustainability exist, ie limiting any partnerships with developing countries HEIs or other partner institutions to where there is an effective local infrastructure. That in turn may mean linking any such support to local political will for reform. Again, to quote from the above World Bank report:

“The state has a responsibility to put in place an enabling framework to encourage tertiary education institutions to be more innovative and responsive to the needs of a globally competitive knowledge economy and to their changing labour market requirements for advanced human capital” (Executive Summary)

- **A Battery of Measures:** any new scheme, even were it to have a budget several times that of the HE Links Scheme, would only ever be one of a number of means by which DFID buys technical assistance for developing countries from UK HEIs and analogous bodies (eg the research or development institutes). Our estimate is that **DFID spends more than £100m per year in UK HEIs** and their research institutes. Any successor to the HE Link Scheme should be seen in that context.

33. In the light of these criteria, and recognising these realities, we have developed and consulted upon two possible variant successor schemes. These do not pretend to be comprehensive, but cover what we see as the range of possible approaches:

- **Option One:** a revised HE Link Scheme with greater emphasis on DFID priorities, aimed at supporting innovative solutions in pilot form that, if successful, could be adopted and applied more widely; or
- **Option Two:** a more highly focussed Scheme for promoting HE institution- to-institution partnerships in priority fields and countries.

34. We were also invited to consider two more technical or operational sets of issues:

- **The implications of untying:** that is, opening up any successor Scheme to any institutions that can contribute effectively, regardless of whether they are UK based; and
- **Organisation:** how best to run any successor scheme.

Our conclusions on these are **summarised at Annex D.**

Option One

35. The first Option **would have all or some of the following characteristics:**

- a. The Scheme would be **based on the existing HE Link Scheme**, but be more clearly aimed at supporting pro-poor human resource development, to underpin achievement of one or more of the specific Millennium Development Goals;
- b. The aim would be to **enhance the capacity** of higher education and other relevant institutions to **train managers, professionals and other personnel** who are directly involved in the provision of key services to the poor (eg education, health, rural infrastructure);
- c. The **geographical focus** would be tightened to align with **DFID's Public Service Agreement for 2003-06** and its geographical allocation of funds generally;
- d. DFID is likely in these circumstances already to have an active support programme aimed at these targets. The new Scheme would form part of that **battery of measures**, but would be a partnership scheme. The partners would be expected, as in the current Scheme, to contribute to its costs;
- e. With a sharper focus on human resource or skills development, the Scheme might be extended to a **wider network of collaborating institutions**: further and higher education, training bodies and non-government organisations;
- f. The collaboration in each case could have a specific aim related to the **training of identified key groups** jointly prioritised with the partner Governments;
- g. Greater emphasis would be placed on creating a **framework or network of institution- to- institution links**, with a view to **long-term sustainability**.

36. Whatever the precise mix of objectives and priorities pursued between a-g above, we believe there would be considerable merit if in any new Scheme:

- a. There were an explicit objective to **encourage and support innovative pilot solutions**, ie 'thinking outside the box,' of the kind envisaged in DFID's PSA Objective V: 'Develop evidence-based, innovative approaches to international development'; and
- b. Linked to this approach, part of the incentive structure might be provision at a **mid-point review** (say, after 2 years) for the best of these examples of

collaboration to be assessed against each other, and taken into DFID's country programme with substantially greater funding.

37. **A Variant One type of scheme could readily grow out of the existing HE Links Scheme** – distilling and embodying what is best in it, addressing its weaknesses, and in particular focussing much more effectively on DFID's objectives. It could be designed as now, by means of relatively modest first stage grants, to promote small-scale innovative initiatives, but narrow considerably at the second stage following the mid-point review at para. 36b above, so as to promote effective development and wider application of the most successful of these.
38. It has to be recognised, however, that **such a Scheme would suffer from some of the difficulties of the existing Scheme**: projects would be small scale, could lack key conditions for sustainability, and would be relatively expensive to process and monitor.

Option Two

39. To respond to such concerns would take one into a **new kind of scheme**. One model for this - which we here call **Option Two** - might have the following features:
- a. Resources would be aimed at supporting a **few collaborative ventures**, each with defined goals but probably an extended time horizon – 6 years or more;
 - b. The aim might be in a given priority country – probably one of the sub-Saharan African Low Income Countries - to **support the establishment** of a leading **Centre of Excellence for Skills Development** in a particular priority field;
 - c. This might form part of a **Government to Government agreement**: the assumption is that DFID's country office would be actively involved;
 - d. The support mechanism would be through a **long-term twinning arrangement** with the most appropriate global partner or partners in that field.
40. This approach could include an explicit encouragement of innovation, as in para. 36a above. It could also be based on that adopted by a number of like-minded donor countries: in particular, the Netherlands, Norway and Denmark. The aim would be to build on their experience, and to **coordinate the UK programme with those of our key donor partners**. But we would envisage the focus being clearly on Skills Development, not as in the case of some of our donor partners on research.
41. We have not attempted a detailed costing of this option. But to make a significant impact, it would probably be necessary to afford sustained funding of up to £0.5m per year per Centre of Excellence: so the "Scheme" within a continuation of the

HE Links budget of £3m would be so modest as to be best seen as a pilot or test-bed for innovative approaches. If successful, these might then be rolled out through other means, including country programmes.

D. Conclusions and Recommendations

42. Each of the above options, and variants around and between them, would clearly need further detailed analysis, and benefit from further consultation before adoption. On the basis of our Review, and the consultations that we have with DFID and British Council assistance been able to undertake, we have reached the following conclusions and make the following recommendations.

43. First, there are from DFID's perspective good **arguments** in favour of simply **terminating the HE Link Scheme**, given:

- The policy of DFID increasingly to invest its aid in support of large-scale, comprehensive and integrated programmes towards agreed country priorities;
- The trend for DFID to work in close partnership with major donor partners, notably the World Bank and EC, and like-minded donor countries, rather than maintain free-standing bilateral aid arrangements; and
- The weaknesses in the existing Scheme from DFID's perspective, as summarised in para. 27 above.

44. **But something would be lost thereby** in terms of the strengths of the Scheme as summarised at para.26 above, and illustrated in the Annexes to this report. We believe there is the **potential to apply those strengths towards DFID's developing agenda**.

45. In the light of our review, we conclude that, **as to policy direction and operation**:

- a. **Any successor scheme** should be developed within the **criteria at para. 31** above, and recognising the realities at para.32 above;
- b. Such a scheme should **engage DFID country offices**, to ensure effectiveness and linkage with DFID's wider and country strategies;
- c. There are attractions – funding constraints apart - in proceeding via a **limited number of pilot projects** to test out any new approach;

46. As between the two options illustrated, there is a **case for adopting a mixed approach** tailored to the needs of different countries: ie that DFID

should look at strategies that can be delivered through a portfolio of different measures applicable to different countries. Thus, an Option Two scheme would more clearly need to fit within an agreed country strategy, and enjoy the support of a host Government. An Option One scheme could be used to test out worthwhile innovative approaches to meeting DFID's priorities even in less propitious circumstances.

47. As to funding, we conclude that:

- a. Each project supported even under Option One would need to cost on average a good deal more than the current £10000 or so per year. Within the existing £3m per year ceiling for the Scheme, if (say) all the Link projects outside sub-Saharan Africa were excluded, that would release sufficient funds for roughly the same number of low income country projects in sub-Saharan Africa as now - 50 plus per year - to be supported on a more generous scale: ie at up to some £60000 per year, or £120000 on average over the first 2 years;
- b. Larger sums would be needed to finance the most successful projects at the suggested mid-term review point (see para.36b): this will not be reached by definition until 2006/07 (unless one accelerated the process by looking for some potential pilots for this approach within the best of the current 400 odd projects);
- c. The only means of carving out the funding within a fixed total of £3m would be to scale back the number of projects still further from 2004/05 onwards;
- d. The larger Institutional Partnership Scheme – Option Two - could only accommodate a small number of such Partnerships within a £3m budget;
- e. The overall funding envelope would be manifestly expanded if, reflecting the partnership approach and shared objectives of any successor Scheme, the Scheme attracted support from elsewhere in the UK Government: both the Department of Trade and Industry, with its support for UK education exports and research, and the Department for Education and Skills, with its support for the effectiveness of further and higher education in England, are potential partners in this regard.

48. In summary, we recommend that:

- a. The **existing Higher Education Links Scheme should be terminated** in its current form after the current 2003/04

round of agreed projects have been allowed to run their course;

- b. There is **need for DFID to develop a wider strategy for the effective support of skills development and tertiary education institutions in low income countries**, so as to promote and sustain pro poor growth and to meet the Millennium Development Goals;
- c. Within that strategy, and in support of it, DFID should develop a **battery of effective approaches** to mobilise the resources of tertiary education partners in donor countries;
- d. Options One and Two as outlined above are both potentially means of doing so. **Option One** has the advantage of supporting **more innovative pilot approaches**, which when tested could be rolled out more widely. It is also more likely to lever in significant resources from the partner institutions. It could be readily developed out of and in replacement of the existing HE Link Scheme;
- e. There should be provision within any new Scheme for the most promising and significant projects thus supported to be built upon to become **Centres of Excellence**, eligible for much more substantial support; but
- f. If **DFID's resources** for this purpose are **limited** to something like the current **£3m per year**, these should be made available for the wider range of potentially innovative projects under **Option One**, rather than concentrated in just a handful of Centres of Excellence;
- g. DFID should seek to **develop its wider strategy**, and the details of a successor Scheme, **in close collaboration with partners**, including other UK Departments with a potential interest, starting with a national conference, and continuing with detailed consultations with partner countries and institutions on the specific elements of the new strategy, approach and partnership support arrangements.

**Terry
Allsop**

Paul Bennell

David Forrester

March 2003

Number of links by region and subject area

DFID priority areas	Sub-Saharan Africa	South Asia and China	South-East Asia	South America	Other Countries	Totals
1 Policies and actions which promote sustainable livelihoods						
Sound policies and pro-poor economic growth	6	11	3	4	0	24
The development of efficient and well-regulated markets	4	2	0	1	0	7
Access of poor people to land, resources and markets	6	3	1	3	0	13
Good governance and the realisation of human rights	14	7	5	2	4	32
Reducing corruption and ensuring a voice for poor people	1	1	1	0	0	3
The prevention and resolution of conflicts	5	1	0	0	0	6
The removal of gender discrimination	7	5	5	5	0	22
Sub-total	43	30	15	15	4	107
2 Better education, health and opportunities for poor people						
Reducing child and maternal mortality	3	7	1	5	0	16
Basic health care for all, including reproductive services	22	11	15	4	8	60
Help to strengthen the international effort to tackle HIV/AIDS	3	0	2	1	0	6
Effective universal primary education	13	0	0	0	0	13
Literacy, access to information and life skills	11	8	6	1	2	28
Safe drinking water and food security	4	5	6	2	2	19
Emergency and humanitarian needs	1	0	0	0	0	1
Sub-total	57	31	30	13	12	143
3 Protection and better management of the natural and physical environment						
Sustainable management of physical and natural resources	14	15	11	14	8	62
Efficient use of productive capacity	10	4	6	6	2	28
Protection of the global environment	8	3	11	2	5	29
Sub-total	32	22	28	22	15	119
4 Managing globalisation in the interests of the poor; creating faster progress towards international development targets						
Investing in people-sharing skills and knowledge	13	7	0	4	1	25
Specifically harnessing ICTs to promote better health, educational opportunity, bridge the digital divide and promote pro-poor research		6	0		0	10
Sub-total	14	13	0	7	1	35
TOTAL	146	96	73	57	32	404

Source: Higher Education Links Annual Report 2001-02

Annex B

Summary of Activities associated with Higher Education Links in 2000-01 in a sample of 100 projects in 10 countries

Country	No. of live links (new + MTRs)	No. of students pursuing Masters/ PhDs/ Diplomas	No. of core staff trained (short-term to update skills)	No of courses developed	No of pubs/ training manuals/ books & visual aids	No of proposals	No of workers from ministries/ professions trained – second tier	Large-scale Workshops/ seminars
Kenya	11	17	62	28	12	8	269	15
Malawi	4	0	40	14	7	1	165	2
Bangladesh	9	2	94	28	25		57	3
China	24	9	136	64	91		805	15
Philippines	6	0	104	48	16	2	133	14
Vietnam	8	1	84	18	21	47	456	9
Bolivia	2	0	19	8	9	3	3	
Chile	13	4	65	29	48	2	141	4
Egypt	21	1	128	48	32	3	835	10
Yemen	3	0	28	6	15	1	59	1
Total	101	43	760	291	276	67	2923	73

Source: British Council

DFID'S HIGHER EDUCATION LINK SCHEME: EXAMPLES OF EFFECTIVE LINKS

Introduction

1. The Main Report above recommends that the existing Higher Education Links Scheme should be transformed into a more effective mechanism for supporting achievement of the Millennium Development Goals (MDGs) and DFID's Public Service Agreement. The aim would be, in these contexts, to draw from, sustain and replicate what has been most successful in the existing Scheme.
2. This Annex contains 10 examples of recent or current Link projects as case studies to illustrate how relatively modest projects can contribute materially to the MDGs in individual countries. Each represents the sort of project that might merit support and extension in the new regime here envisaged. Common characteristics are that:
 - Each has depended on partnership between a number of parties,
 - Each has started with stated objectives and intended outcomes that may in the event have been exceeded; and
 - Several have attracted funding from other sources that has enabled them to be extended beyond their initial expectations.

Ensuring Environmental Sustainability

3. An example from the current HE Links programme demonstrates how the millennium development goal of environmental sustainability can be supported from a small initial base with an effective community outreach focus, then grown into a larger scale initiative.

Millennium Development Goal: ensure environmental sustainability

Case study 1

In Egypt the University of the South Valley, Aswan and the University of Glasgow are collaborating with the Bedouin community to improve agricultural practices, with the ultimate objective of enhancing the living standards of communities living in marginal and fragile arid environments. This community-focused project is working alongside a major DfID ESCOR project worth £96,000, researching indigenous environmental knowledge and sustainable development in semi-arid Africa. The link activity is developing the skills of Egyptian staff, promoting the Egyptian partner as a centre of excellence and building links with the nomadic desert community.

4. Similar instances of large programme developing out of small-scale projects have occurred in skills training, where a gap has been identified as a result of initial work with a local group. A link between the University of Westminster and the Institute of Public Health in Alexandria to raise awareness of nutritional issues within squatter communities examined ways of alleviating nutrient deficiencies. It resulted in a Ministry of Health-supported course at the Institute that has so far trained 3000 health workers.

Education and Health Related Goals

5. There are good examples of small-scale projects under the Scheme that have made striking contributions to achieving education and health-related millennium development goals, through practical and achievable initiatives. These are projects which can be evaluated against millennium goals and, where appropriate, upscaled into larger ventures that might be co-funded by other agencies.

HIV/AIDS

6. Projects that contribute to combating HIV/AIDS, malaria and other diseases have played an important role by operating at community level, and thereby reinforcing messages and complementing national efforts.

Millennium Development Goal – combat HIV/AIDS.....

Case study 2

Over 100 rural craftswomen from KwaNatal participated in workshops to raise HIV/AIDS awareness as part of a one-year gender and development (GAD) small project in South Africa. Medical experts, officials from Durban City Health Department, the National Association of People Living with AIDS participated in the workshops alongside these women. The focus of the workshops was on changing attitudes towards people living with HIV/AIDS as well as prevention of the disease.

The craftswomen were encouraged to express their new awareness and to signal prevention messages through their crafts, and to disseminate and replicate products and messages within their communities, as well as creating new designs for commercial sale. Groups adapted the HIV/AIDS logo and produced a wide variety of unusual jewellery and crafts. Their work has subsequently been used at World AIDS conferences in Durban and London. Products have been sold to new markets as far away as America and UK, ensuring income for craft workers. The outcomes have been monitored and the impact of the link has become regional.

Case study 3

A similar initiative is now under way with the University of Malawi, which is starting an HIV/AIDS awareness programme with rural craft workers.

Case study 4

A further link in South Africa between University of Natal and University of London is supporting the promotion of HIV/AIDS prevention within local schools.

Malaria

7. The early diagnosis and treatment of malaria and other diseases has also been the subject of HE links. Provision of and access to primary health care in the community, education and awareness-raising about the possibilities for treatment can all contribute to reducing the number of deaths from treatable diseases.

Education Millennium Development Goal – combat malaria and other diseases

Case study 5

A comprehensive roll back malaria programme has been being developed by the Ministry of Health in collaboration with Liverpool School of Tropical Medicine, Sana'a and Aden Universities and the WHO, as part of a very productive link looking at wide-scale health sector reform in Yemen. This initiative has received backing from the highest levels of government.

Case study 6

Nottingham Trent University and the University of Dar es Salaam are working on the development and implementation of an epidemiological information system to support the National Filariasis Control Programme (a parasitic worm transmitted by biting flies and mosquitoes in the tropics, causing disease). This will aid health professionals within Tanzania to make more informed decisions about prevention and treatment.

Gender Issues

8. The current HE Links programme with the emphasis on small-scale community actions has been an effective way of involving and empowering women. Many would probably not have been directly engaged through large scale central policy-led initiatives, but can find a voice in community based projects, which give them a platform for becoming engaged with wider societal issues such as HIV/AIDS awareness, as illustrated above, and in pioneering new farming and animal husbandry methods, and thereby contributing to the eradication of poverty and hunger. An example of this was the establishment of a

women's cooperative in Indonesia, which pioneered a goat management and forage crop system.

9. Through small-scale Links women have also been encouraged to participate in the democratic process:

Gender Millennium Development Goal – promote gender equality and empower women

Case study 7

*A particularly successful project from Jordan was entitled **Inclusion of illiterate women in the democratic process**. Its aim was to raise the awareness of illiterate and semi-illiterate women on the parliamentary and electoral process. As a direct result of the various workshops and information sessions over 150 women from the refugee camp have registered to vote. One participant reported that the workshops have given the women, for the first time in their lives, a clear picture of what their rights were, and how participation could make their voices heard in their communities.*

Another aspect of the project has been the preparation of a television broadcast that will be shown leading up to the parliamentary election, that will encourage women from low socio-economic backgrounds to register to vote. One other aspect of this project is the impact of the role of word of mouth in spreading the ideals promoted in the workshops. Many women repeatedly commented on how they spoke with their friends and family on the information they had learned and how this will ensure that more and more women become aware of their democratic rights and the electoral process in Jordan.

10. Some skills development projects that have been taken up at government level have started as small projects. In a new programme some of these initiatives might immediately be deemed eligible for more significant investment. Training programmes for educationalists and health professionals have been initiated under the current HE Links programme.

Universal Primary Education

11. One HE Link in the field of primary education focussed on special education provision:

Millennium Development Goal – achieve Universal Primary Education

Case study 8

A link called 'Working towards inclusion in Kenya' between Kenyatta University and the University of Cambridge was initiated by a senior DFID adviser and the Ministry of Education in Kenya, as it was decided that there was an urgent need to review existing policies and provisions in inclusive schooling in Kenya. This followed a 1995 report by the World Bank, which examined Kenya's separate special education system. It found that the majority of children of school going age with disabilities did not attend school and very few teachers held any qualifications relevant to special education. Recommendations arising out of the report were that there should be greater inclusion of children with disabilities in mainstream schools and a substantial expansion of training teachers in special education.

This link is taking action by developing an inclusion strategy to the special needs policy. The inclusion strategy will be presented to parliament for debate before becoming law after any amendments deemed necessary.

The B.Ed and M.Ed courses at Kenyatta University have been revised through the link to incorporate special education. This will further support implementation by ensuring that there is a trained and sustainable cadre of staff available to implement the new policy. These initiatives will go a long way in ensuring that all children get equal access to educational opportunities in Kenya.

12. In the above example, the Kenyan Ministry of Education was involved and has been able to use this experience as the basis for an education inclusion policy. Other projects have supported the training of teachers and have highlighted the importance of education, and especially education for girls in communities where this has not been a traditional entitlement.

Healthcare

13. The upgrading of healthcare training has also been addressed in small-scale projects. Modest initiatives that have had demonstrable results can then be taken up by governments or regional authorities. As the case study below demonstrates, it has also been possible to reach out to people outside any formal organisational setting.

Millennium Development goal: reduce child mortality

Case study 9

A Link in Egypt between University of Leeds and University of Cairo, aiming to increase the utilisation of primary health care services by mothers and children, has been working in three community centres in Greater Cairo promoting greater take up by the surrounding communities. Partners state that there are now over 20,000 clients enrolled at the community centres which promote simple techniques for infant welfare, such as teaching groups of illiterate women how to provide nutritious meals for infants using a simple colour coded system. Staff now plan to replicate these initiatives in other community centres in Egypt.

Millennium Development goal: improve maternal health

Case study 10

Midwifery training, particularly for community nurses who work in villages, is crucial in efforts to reduce maternal mortality rates. The focus of Links in this field is often on upgrading technical skills, as well as introducing effective communication and delivery skills.

A Link between the Schools of Midwifery in Salford and Lady Dufferin Hospital (LDH), Pakistan has imparted training to midwives. This is credited with a resulting reduction in the maternal morbidity rate at LDH by 50%. LDH is now being developed as a centre of excellence within Pakistan.

EVALUATION OF DFID'S HIGHER EDUCATION LINKS SCHEME AND POSSIBLE OPTIONS FOR THE FUTURE – CONSIDERATION OF TECHNICAL AND OPERATIONAL ISSUES

I. Extending the Range of Partner Institutions Internationally: Untying

1. We were invited in our Terms of Reference to address the issue of 'untying'. We have taken that to mean the global sourcing of the most appropriate expertise in pursuit of DFID's objectives at the international going economic rate. In principle, therefore, **untying should enable DFID to gain access to more or better technical assistance within any given budget. It should also make it easier to concert any DFID aid programme with those of the major international donors** (notably the World Bank and EC) and of like-minded country donors, such as Norway, whose equivalent Links scheme is already untied.
2. There have been strong concerns expressed by some (notably Universities UK, the body that represents universities in the UK) at the prospect of applying this principle to a modified HE Link Scheme. But most interests seem to accept the case for such transparent and increased competition. It should be noted, however, that the practical impact of untying would depend on the precise nature of any successor Scheme.
3. Thus, if the incentives were modest, so that the contractor were expected to put in a significant proportion of the resources required, many potential contractors would withdraw; and those that did express interest might do so to gain access to a new market, treating the project as a loss leader. The implication is that over time some of those able to contribute most could choose to withdraw. Against this, the incentive structure built into Option One as outlined in the Main report above, and the much more substantial resources per agreed project built into Option Two, would powerfully offset this tendency. Either of them should be more stable under an untied regime than the present Scheme.

II. The Management of any Successor Scheme

4. It is part of our central thesis, borne out by experience such as that reflected in the World Bank report cited in our main report, that any DFID aid programme would be more likely to have **maximum impact if it is integrated with a broader programme of reform and support.**
5. That in turn implies that:
 - a. For any of the Variants described in the Main Report above, DFID country posts should play an active role in setting priorities;
 - b. There would still be advantage, however, in pooling resources between country posts either within a region or worldwide, to allow for more effective use of resources from one year to another. This administrative and payment process, and the detailed management of any programme could still be contracted out to another body acting as DFID's agent. There is a strong argument for that continuing to be the British Council, which has the established expertise, relationships and capacity to work with DFID posts effectively;
 - c. If a particular DFID post deemed such projects to be outside their priorities, that might be judged sufficient to exclude them;
 - d. On the other hand, the British Council also would need to feel some co-ownership of any new Scheme if their administrative overhead charge was not to become disproportionate. We think that, while it complicates the pure contractual relationship, it would be in the spirit of partnership that we commend, as well as appropriate on wider grounds, to provide for this.
6. There is then the separate but related issue of administering a Scheme that was untied: ie open to institutions from all countries to tender for. Preliminary indications from the **British Council** are that they would be willing to continue to administer a Scheme that was untied.

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