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## FINANCING EDUCATION SECTOR DURING THE MARTIAL LAW: BEST PRACTICES

**Abstract.** Adequate financing of education is necessary to maintain an efficient system and provide high quality education. The armed conflicts have a negative impact on economic development, as a result, the available resources become limited. Usually, the education sector is not a priority for financing, but educating the population remains important. The purpose of our article is to determine the best practices of funding the education sector during wars and armed conflicts. Our analysis of the impact of the wars and armed conflicts on the economic development of the parties involved showed that the lack of funds leads to the reallocation of the government expenditures towards military and defense sectors, usually at the expense of others, including education. It has been established that the impact of armed conflicts on the financing of the education sector is determined by several factors, in particular, the drop in economic growth rates, the disruption of trade relations, and the reallocation of expenditures from other sectors to defense and the army. This means that the state requires external help to finance educational sector. Globalization caused the growing interdependence of the national economies, so the neighbor countries are particularly interested in resolving that conflict and supporting the afflicted party. As such the international community created a program to support education development in emergencies (including natural disasters, wars, armed conflicts etc.) and practical recommendations for their implementation. There are several parts of the program for different scenarios including creating temporary facilities to provide preschool and school education, and relocation of the children (including abroad) for the purposes of subsequent repatriation or integration. As a result, the external support includes official development aid (financing the education sector of the recipient) and providing aid to the refugees. It has been established that at the moment only 29 countries are donors of the official development assistance in the field of education, and most of it is provided by 5 countries. On the other hand, most of developed countries have established practices to provide help for education of the migrants and refugees.

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Wars and armed conflicts are costly in several ways, most of which are obvious and easy to assess. Less evident disruption is the educational process, as the population of school age faces issues while trying to achieve the desired

level of education. This issue is likely to impact not only the tertiary education students forced to join the army but also the students of school age. During wars, the civilian population is severely hit, so physical access to schools may

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be impeded by bombings, fighting, army requisitions, and transportation difficulties. In addition, casualties and the loss of income for the families may prevent a transition into tertiary education even when the war is over.

More so, the armed conflicts tend to change the spending priorities of the governments, leaving the education sector without sufficient resources for efficient and successful performance. The military aggression by Russia left the education sector of Ukraine in a precarious position. While it was one of the top priorities during the time of peace, it is not possible to maintain the same level of financing during the war. As such, it is important to determine the possible ways to provide comprehensive and high quality education under the constraint of reduced funding.

Recently, the topic of the impact of military conflicts on the education sector and its financing became more widespread. It was caused by the fact that empirical studies confirmed that wars and armed conflicts greatly impact the accessibility and quality of education due to several factors.

The purpose of our article is to determine the best practices of funding the education sector during wars and armed conflicts.

A history of conflicts has been shown to impose large economic and social costs for all the parties involved. The consequences vary from the loss of human life, human capital, and destruction of infrastructure, to political instability and further uncertainty that prevents investment and economic growth. Another issue stemming from the conflicts is the shortage in public finances, as a part of the tax base is destroyed lowering revenue while

raising military expenditures. As a result, fiscal deficits and public debt increase, but it happens while resources are diverted away from social spending. It needs to be noted that the last time as many developed countries were involved in the conflict was during World War II because recent local armed conflicts and civil wars were mostly focused in the developing countries while the developed countries were not involved and could offer swift and substantial help. More so, the education systems of the involved countries were not very developed so the required expenditures were not high.

The empirical research showed that during the 1980s there was a visible decline in primary school enrolment rates, and most of them happened in the countries afflicted by armed conflict. Furthermore, it was proved that armed conflict became one of the major obstacles to achieving the Education for All goals, established in 1990 by the international community. The loss of schooling for children and young people was caused mostly by the destruction or closing of schools, and the displacement of the population and the teachers. Schools and teachers became deliberate targets in wartime [1].

Another empirical evidence of the impact of armed conflicts on education is the situation in sub-Saharan Africa. Overall, in recent years, about a third of the countries in the region experiences some form of conflict.

Such conflicts may pose an additional challenge at the regional level, due to their potential spillover effects (Fig. 1). There are several possibilities such as a direct spillover effect (attracting neighbors) and indirect spillover effects (economic activity or social strains). It

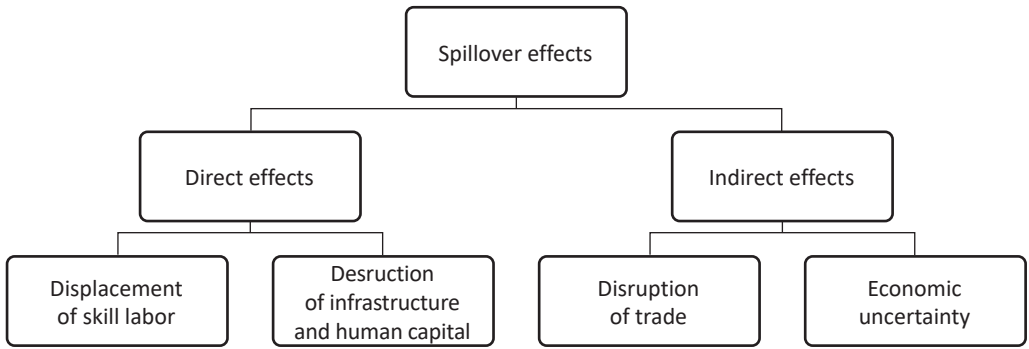


Figure 1. **Potential spillover effects of the armed conflicts**

*Created by the author.*

was determined that conflicts in sub-Saharan Africa are usually persistent, although the duration of conflicts varies considerably across the region. The displacement of the population is one of the major consequences of conflicts in sub-Saharan Africa. The region involved in the conflict has significant economic, fiscal, and social costs, but the nearby regions are forced to shelter the displaced people. Another result of the conflicts is that real GDP growth is, on average, about 2,5 percentage points lower where there is conflict.

The empirical analysis confirmed that the causes of the decline in productivity, investment, and export growth include greater security concerns; displacement of skilled labor; disruption of trade; destruction of human capital and physical infrastructure; a rise in economic and political uncertainty; disruption and weakening of institutions.

The destruction of human capital can be measured by the impact on the education and health sectors. For example, primary school enrollment rates for girls and boys on average dropped by 13 and 9 percentage points respectively.

The most important issue is the impact of the conflict on the public

budget revenues and expenditures. This significantly limits the ability of the respective government to respond to conflicts efficiently, leading to the aggravation of their economic and social costs. It was determined that the revenues are reduced by destroying the tax base, disrupting economic activities, and decreasing tax administration. The expenditures include reallocation towards higher military spending even if total public spending does not increase significantly [2]. We can make a conclusion that the reduction of the expenditures for education during the armed conflict is unavoidable and can be offset only by international financial aid. To lessen the harmful long-term economic effects of the conflict it is necessary to protect social and development spending and maintain efficient institutions.

To assess the consequences for the education sector of Russia’s armed aggression against Ukraine we should study the results of World War II. It was determined that World War II caused a significant decrease in educational attainment for those who were of elementary school age during or immediately after the conflict. The empirical evidence presented by the

researchers [3] who compared the facts for four countries, including two directly involved (Austria and Germany) and two with the spillover (Sweden and Switzerland), demonstrates that the magnitude of this educational loss was about 20 % of a year of schooling. The authors estimated the effect for those being born during the thirties, compared to those being born in the previous or subsequent decades in the above-mentioned two German-speaking countries.

Until recently, the majority of ongoing armed conflicts were concentrated in the developing and the least developed countries that had no possibility to support their education systems. The understanding of the importance of education by the international community led to the creation of the international program Education for All (EFA), and its revision in 2000 caused the adoption of the Dakar Framework for Action, which identified conflict as «a major barrier towards attaining Education for All» [4, p. 19].

During conflicts, the key issue to reaching EFA goals is the lack of an effective, widely accepted policy or strategy to address the dual problems of weakened governments and the lack of

clear mandates and coordinated action plans for an international response. International agencies have mandates for refugees to provide assistance for education using international funding. But the responsibility for education in countries undergoing conflict belongs to national and local education authorities.

Such a situation created the concept of emergency education and its support by the international community. The issue is that it consists of a range of initiatives without detailed practical solutions. The general complaint is that the commitment of governments to education is rather questionable. For example, teachers are fortunate to be paid. Schools are lucky if they are not attacked and looted. Education is often not a priority during conflict situations.

The major humanitarian NGOs and UN agencies proposed a simplified emergency education model that addresses the challenge of establishing an education system under duress. Sadly, it is applicable mostly in refugee camp settings. There are three phases of the Framework for Education Programs in Emergencies: safe spaces and recreational activities (Phase I); non-formal education (Phase II); and formal education (Phase III) (Fig. 2) [5].

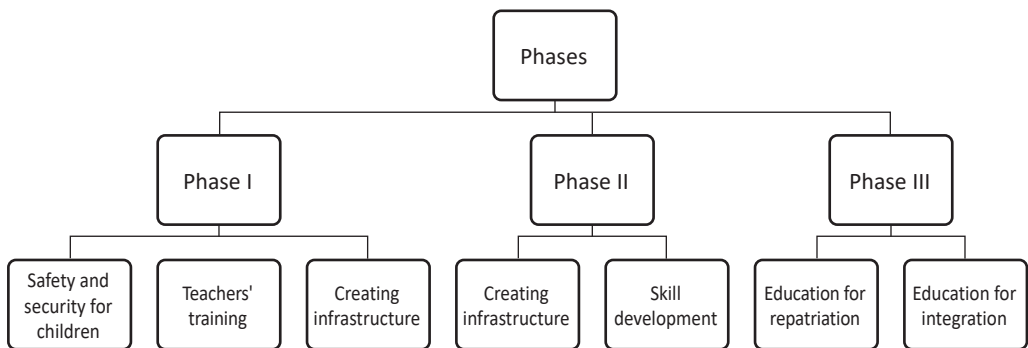


Figure 2. Phases of the Framework for Education Programs in Emergencies

Created by the author based on the Framework for Education Programs in Emergencies [5].

The aim of Phase I is to establish areas of safety for children, to register children for organized recreational and expressive activities like sports, art and drama. Another part is the teacher training and developing a primary school structure. The purpose of Phase II is to «promote social reintegration and development of cognitive/social skills by affected children and youth through structured non-formal education activities» [6, p. 14].

The UNHCR's Guidelines for Educational Assistance to Refugees propose to divide Phase III into Phase 3A (the period of the refugees' exile will be short) and Phase 3B (or «Adjustment to Extended Stay»). Phase 3A focuses on the «normal» curriculum (from the home country), to help prepare for repatriation.

The issue with Phase 3B is to determine the ultimate purpose of education for that period. There is a choice between repatriation or integration. The best possibility is to «mix» it to accommodate both outcomes.

The effective emergency education approach includes pre-school for young children. It aims to stabilize young children and provide them with

structure. Among the most important components in all of this work is successfully meeting the challenge of addressing the psychosocial needs of war-affected students (and, where possible, their parents or guardians), as well as their teachers.

There are two approaches to this issue that are most widespread. The first one is to continue providing formal education to children. It is based on the concept that schools provide structure, an environment of normalcy, intellectual stimulation and, give parents time for work. It also provides a replacement for idle time. The second approach supports expanded curricula as to engage children to the full extent.

Thus, it becomes obvious that countries involved in the armed conflict are not able to finance education on their own. They require external financial aid. There are several frameworks to fund the gap for education in emergencies (Fig. 3).

The financing frameworks are used to fund all educational levels and are complementary rather than exclusive [7].

1. Humanitarian aid in the form of consolidated requests for funding. It was

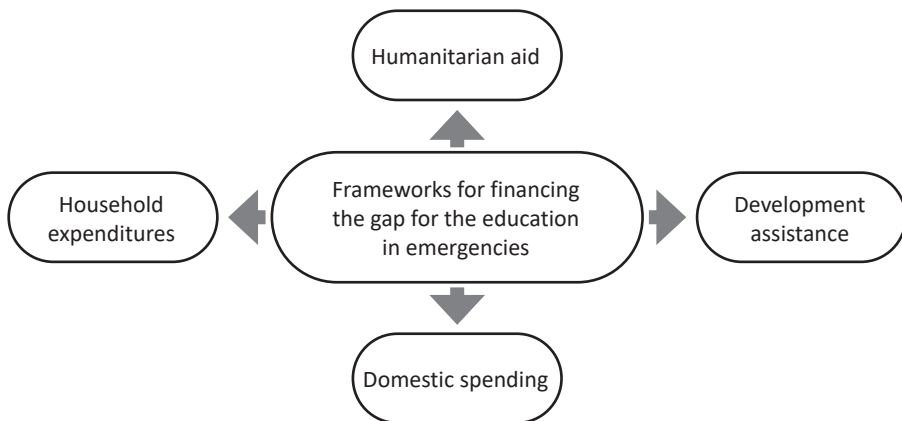


Figure 3. Key frameworks for financing education gaps in emergencies

Created by author based on [7].

noticed that education in this context is consistently underfunded. For example, in 2013, only 34 % of education funding requests got financing (2,4 % of total aid), and a gap of US\$239 million was not funded. Over the period 2006-2013, education made up an average of 4 % of requests but received only 2,3 % on average of funding received. Humanitarian funding includes only UN and international NGOs.

2. Development assistance plays a dominant role in aid to education as donor funding is a large proportion of public expenditure on education in some countries. There are 25 countries in which more than 10 % of public expenditure on education is from donor spending and in Liberia and Afghanistan, this figure is more than 40 %.

3. Domestic Resources are the single largest source of funding for education across all types of countries. Data on overall government expenditure on education is available but generally does not include a specific breakdown of domestic government expenditure on education during and after emergencies.

4. Household Expenditure contributes to education when money is available. And that the poor may do so disproportionately compared to the better off.

For a long time, international financial aid for the countries involved in armed conflicts remain unsystematic and unorganized. It was a reaction to requests and it was usually insufficient. Adopted in 2000, the Dakar Framework for Action gave a start to significant improvements in the field of education in emergencies. There are 5 key factors, contributing to it, such as the development of common standards, gathering a literature and evidence base,

establishing professional networks, growing recognition of the issue, and mainstreaming of education response. For example, as a result, the Inter-Agency Network on Education in Emergencies (INEE) was created to include several international organizations that already are engaged in financial aid in cases of emergencies. The researchers [8] consider that the reason for the INEE efficiency includes 3 features, such as it is non-operational, meaning that it's a framework for collaboration and sharing of experience; it is virtual in nature; the main part of the network is formed by institutional members.

As a result of the INEE efforts the standards were created and divided into 5 parts (*the INEE Minimum Standards for Education: Preparedness, Response and Recovery*) [9]:

1. Foundational Standards;
2. Access and Learning Environment;
3. Teaching and Learning;
4. Teachers and other Education Personnel;
5. Education Policy.

As international financial aid depends on the situation and is not in any way periodical and guaranteed, there are no steady publications to reflect this topic. The most comprehensive source of statistics is the UNESCO Global Education Monitoring Report which is dedicated to this topic. Up to date, there were two issues:

- The 2011 EFA Global Monitoring Report «The hidden crisis: Armed conflict and education» examine the damaging consequences of conflict for the EFA goals. The main purpose of the research was to assess the armed conflicts and their impact on education, to determine what to consider an armed conflict, to create an agenda to protect children during

conflicts, and their right for education and to aid in restoring education systems after the conflict is over. It became the first comprehensive report about international support towards the parties of the conflict.

– The «Global Education Monitoring Report 2019: Migration, Displacement and Education – Building Bridges, not Walls» focuses on the theme of migration and displacement. It was the first comprehensive try to distinguish different types of displaced persons. It was a reaction to the migration and refugees crisis in Europe and the USA as there are a lot of migrants who are trying to bring their families with them. It was shown that it was necessary to adjust education curricula as newcomers were rather behind in many aspects of education. As a result, the schools accepting migrants required additional funding to perform efficiently [10–12].

The source for the data on the official development aid is OECD Database.

The dynamics of the national expenditures on education across the world since 1999 were somewhat uneven (Fig. 4).

The period from 1999 to 2008 was marked by strong economic growth in

developing regions. Rising wealth, in turn, increased government revenue and boosted education spending. Financial and economic crisis, intensification of the armed conflicts, and natural disasters led to a decrease in expenditures by 2017.

Development assistance is a key element in the EFA financing architecture. This is especially true for low-income countries facing large financing gaps. In 2005, donors made a series of commitments to increase aid. For example, at the Gleneagles summit, 8 principal donors from the EU countries promised to donate up to 50 billion USD (in 2004 prices) more by 2010, intending to allocate more than half of that increase to Africa. Sadly, that promise was not kept. According to the EFA Global Monitoring Report 2011, the official development aid (ODA) allocation was mostly for the countries with low income (Table).

To support the least developed countries, the United Nations tried to establish the aid target for donors depending on their GNI (gross national income). The goal was to donate 0,7 % of the GNI. By 2010 only five countries-donors achieved this target. Most others

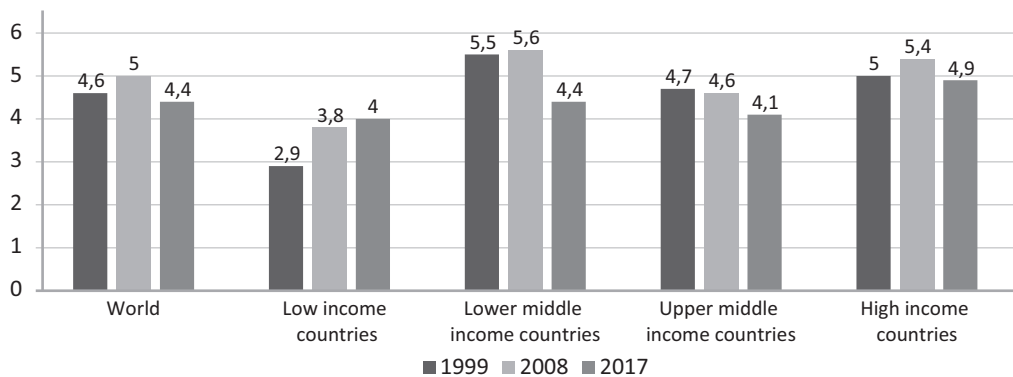


Figure 4. **Public education expenditure by country income group as a share of GDP, %**  
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Table

**Total disbursements of aid to education, millions USD**

Groups of countries	Total aid to education disbursements		
	2002-2003	2007	2008
World	7257	11697	11410
Low-income countries	2308	3802	3662
Lower middle-income countries	3078	4622	4605
Upper middle-income countries	1094	1618	1622
High-income countries	30	57	30
Unallocated by income	747	1599	1490

Source: [12, p. 107].

adopted the goal for 2005 as their target. The EU countries as a whole established as a goal to allocate 0,56 % of collective GNI but no less than 0,51 % per country. But it is doubtful that most European countries will be able to achieve and maintain this goal. For example, for some years several European countries including Sweden, the Netherlands and the United Kingdom, managed to donate up to the target amount but it was not constant. Germany and France donate a lot but are still below their commitment. Italy is among the least involved donors at 0,16 % of GNI. Japan and the USA are not even trying to declare and achieve their targets, the aid depends on the economic situation and is not a priority.

The financial crisis is weakening some donors' commitment to the international aid targets. Uncertainties over future aid levels have worrying implications for financing in education and other areas. With many low-income countries facing acute fiscal pressures, aid has a vital role to play in protecting basic service provisions. The danger is that cuts in development assistance will slow progress or even trigger setbacks in human development as governments are forced to cut spending (Fig. 5).

Recent aid data points in a worrying direction for the EFA agenda. After five years of gradual increase, aid to basic education stagnated in 2008. In the

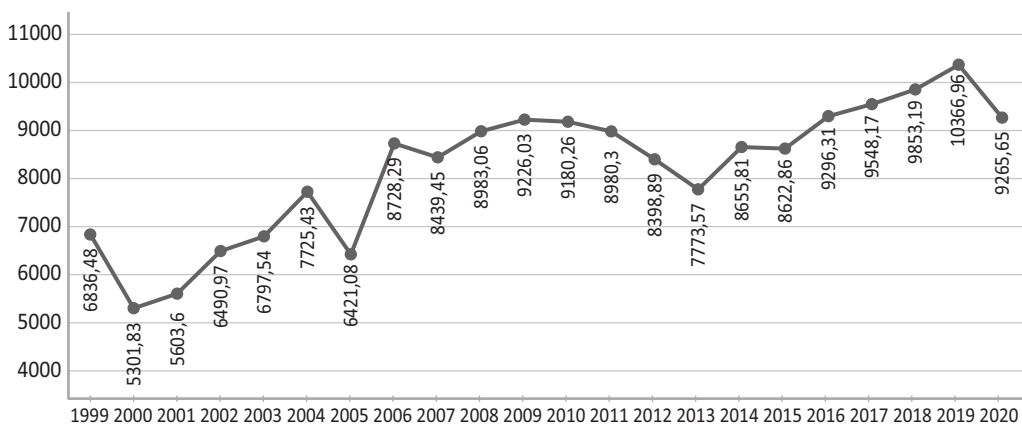


Figure 5. Total official development aid for education at 2000 constant prices, millions USD

Created by the author based on: [13].



case of sub-Saharan Africa, the region with the largest EFA financing gaps, disbursements fell by 4 % between 2007 and 2008. Factoring in the growth of the school-age population, this translates into a 6 % decline in aid per child. This outcome calls into question the level of donor commitment to the pledges made at Dakar in 2000. While aid commitments showed a slight rise in 2008, commitment levels often provide a weak guide to disbursements.

The levelling-off of aid in one year does not necessarily signal a new trend, but it does reinforce three long-standing concerns over development assistance for education: a narrow base of major donors, the low weight attached to basic education and the level of the aid-financing gap. The narrow donor base is a source of potential instability in EFA financing (Fig. 6).

For the period 1999-2020, more than 60 % of ODA for education was

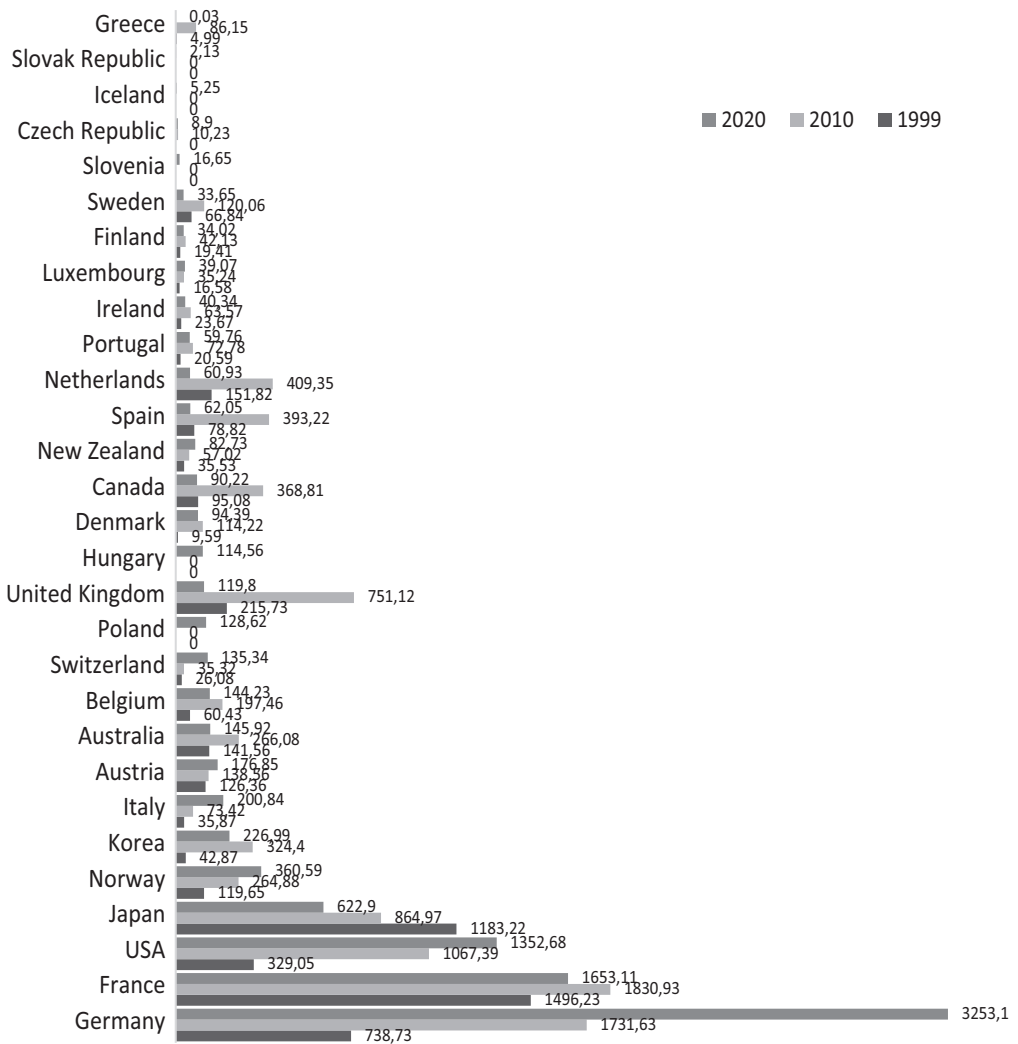


Figure 6. Official development aid for education by donor countries, millions USD  
 Created by the author based on: [13].

from 5 main donors and even then their contribution varied greatly. An obvious corollary is that even small shifts in priority by one or two of these donors can have very large aggregate effects on aid flows. From 2007 to 2008, aid to basic education from the United Kingdom declined by 39 % and from the Netherlands by 30 %. Without countervailing increases from Spain and the United States, overall disbursements to basic education would have fallen further. There is some logic to donors specializing in aid to particular sectors since this can reduce transaction costs and strengthen impact. But there is little evidence to suggest that major donors are coordinating their efforts in the light of global aid financing requirements for education. Expanding the pool of major donors would help contain these risks and address the twin challenges of increasing overall aid and reducing volatility. The entry of emerging donors could play a vital role in diversifying aid to education.

As of 2020, 29 countries offered their resources for the ODA in the educational sector. For example, in 2020 five major donors provided 78 % of the ODA for education meaning that

Germany provided more funds than the 24 donors combined (Fig. 7).

International aid can be efficient support in conflict-affected countries. It can aid the efforts of local communities to keep access to education, offer the finance needed to facilitate peace and reconstruction efforts, and support the development of education institutions' capacity. There is a reason to increase aid to countries involved in cycles of violent conflicts. But the aid donors prefer to exercise caution while offering development assistance to affected countries. The general purpose of aid should be focused on reducing poverty and extending opportunities in several areas including education. Achieving that purpose under the armed conflict is inevitably difficult, it may require the development of innovative strategies.

To support the education sector of the affected country, international aid may take the form of admitting refugees and providing them with education. As it was discovered, for the host state refugees tend to cost more than immigrants, as the latter are mostly adults looking for gainful employment. Sizeable inflows of the refugee include children and young adults so it may require considerable

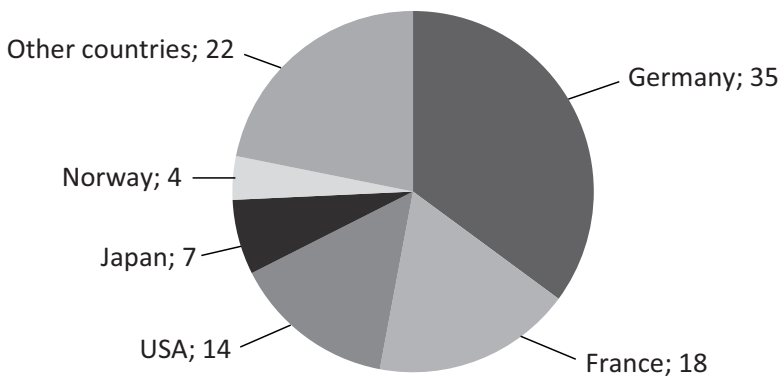


Figure 7. Official development aid for education by donor countries in 2020, %  
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short-term expenditure on their basic needs, language training and other integration measures. The empirical research on the economic impact of the massive influx of refugees in Germany demonstrated that there were short-term costs of 0,5 % up to 1,5 % of GDP, but it was forecasted that within 3 to 10 years the positive effects will be able to offset the costs. The authors calculated that it will be so, even if their unemployment would be above 50 % for 10 years and never drop below 35 % and the productivity being two-thirds of the average productivity of German workers [14].

In many cases, budget expenditures depend on the number of students enrolled. This allocation criterion may be simple and transparent, but it ignores other measures and school features.

Schools enrolling high numbers of refugee students are more likely to require more funds. These students need to overcome language barriers and usually have a poorer socio-economic background. They also often have lower learning achievement, even considering their socio-economic background, so are more likely to repeat or drop out.

Additional funding for schools with migrants would support measures addressing language barriers and other challenges in order to improve their academic performance. There are a few examples of programs that incorporate migrants as an explicit factor in school funding. In Lithuania, schools receive an additional 20 % for each national minority student and 30 % for each immigrant student in their first school year in the country. The extra funds support integration classes, bilingual education, Lithuanian as a second language and mother tongue instruction [15].

In the United States, the Department of Education has allocated funds to the Migrant Education Program since 1966. A formula determining states' access to the funds is based on migrant student count and per-student expenditure.

The support of migrant and refugee education is not only based on the funding formula as its amount is rather insignificant. It was determined that such students require additional financial support to receive the same level of education as the locals. As a result, European countries offer different additional frameworks to provide more support to refugees and migrants. For example, several countries offer the municipalities a lump sum grant to be allocated for students adhering to specific criteria. Denmark uses a socio-economic structure of the students and Norway prefers to depend on the share of immigrant children in the school. After receiving the funding the local government can allocate those resources at their discretion. Denmark tries to establish allocation on an individual basis by engaging special counsellors to work with immigrant families. Switzerland allocated additional funding to schools that have the most migrants for special learning programs, including languages.

Additional support targets teachers, who may have trouble connecting with immigrant students and families and respond by lowering education and disciplinary standards, or not responding at all. Germany funds programs to recruit and mentor teachers with immigrant backgrounds who can then support immigrant students and be cultural intermediaries with staff. The main problem with the efficient use of the allocated aid is that the schools

involved are not the best regard for learning programs offered, pedagogical and administrative staff involved. That means that efficient usage of the funds received is limited. For those schools increased demand for language teachers and social-emotional support staff is difficult to meet in the short term. They require additional measures, including better working conditions, and better pay for the staff which is difficult to achieve as the government is not ready to provide that much money to them [16].

As a result, formula-based funding is a means of helping schools carry the higher cost of educating students from disadvantaged groups. It needs to be said that to save costs, most high income countries do not include migration status as a factor for allocation, be it as part of the formula or otherwise. The only criteria used to receive the additional funding is the socio-economic status of the migrants and refugees.

**Conclusions.** Governments during armed conflicts usually reallocate available resources towards military expenses. The education sector loses national financing and requires external help. The local household expenditures and private donations are among the possible sources, but they can't be a steady way of incoming funding. Another possible source is international aid in the forms of humanitarian aid and development aid. Humanitarian aid is situational as well and is usually rather limited. So the main focus of incoming resources is the development

aid offered by international donors for different purposes. Its limitation is that it depends on the will to help the donors as they decide the amount and the recipient.

The other way to provide financial aid is to offer education to the refugees and migrants. The developed countries recognize that it's necessary so they allocate additional financial resources for those purposes. Depending on the nature of the conflict the donors offer aid with different aims: to repatriate refugees in the future (for those planning to return after the conflict is over) or to integrate them (in cases where it is obvious that the situation is not about to improve any time soon). As the refugee crisis is not a new phenomenon in developed countries there was an evolution of the approaches to aiding the education of the refugees. At the beginning, the refugees and migrants usually were established as separate groups with their own financing. Recently, the approach has changed and the amount of help available depends on the socio-economic status of the applicant (parents' education, income etc.).

The armed aggression against Ukraine showed that the existing framework for international aid is not enough. Before now, most countries involved were among the least developed, as such any amount of aid was of huge help and led to the significant improvement of their education sector. Unlike them, Ukraine has a highly developed and advanced education system so maintaining that standard requires substantial financial aid.

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## СВІТОВИЙ ДОСВІД ФІНАНСУВАННЯ ГАЛУЗІ ОСВІТИ В УМОВАХ ВОЄННОГО СТАНУ

**Анотація.** *Належне фінансування освіти є передумовою її ефективності. Військовій дії та воєнний стан створюють загрозу для подальшого функціонування й розвитку системи освіти. Метою статті є комплексний аналіз світового досвіду фінансування освіти в умовах воєнного стану. Розглянуто питання впливу збройного конфлікту на економічний розвиток і стан системи освіти в країні. У процесі дослідження використано загальнонаукові методи, зокрема синтезу, аналізу, дедукції. Проаналізовано основні підходи до програми розвитку освіти в надзвичайних ситуаціях і вплив збройного конфлікту на втягнуті в нього країни та їхніх сусідів. З'ясовано, що вплив збройних конфліктів на фінансування галузі освіти визначається декількома факторами, зокрема падінням темпів економічного зростання, порушенням торговельних зв'язків, переорієнтацією витрат з інших галузей на оборону й армію. Визначено, що протягом останнього часу активно розроблялися підходи до створення концепції освіти в умовах надзвичайних ситуацій та було сформовано практичні рекомендації для їх запровадження. Обґрунтовано, що країни, які беруть безпосередню участь у збройному конфлікті, не можуть самостійно забезпечити ефективне фінансування системи освіти, тому потребують міжнародної фінансової допомоги. Розглянуто світову практику фінансування освіти та основні напрями надання міжнародної фінансової допомоги. Встановлено, що наразі лише 29 країн є донорами офіційної допомоги для розвитку у сфері освіти, причому більшу її частину надають п'ять країн.*

**Ключові слова:** *фінансування освіти, воєнний стан, освіта для всіх, збройний конфлікт, офіційна допомога для розвитку, гуманітарна допомога.*

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