

Mid-Term Evaluation of the EFA Fast Track Initiative

**Draft Synthesis Report
Volume 3 – Appendices
Appendix II: Trends in Education Finance**

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Acronyms and Abbreviations

CF	Catalytic Fund
CSR	Country Status Report
DFID	Department for International Development
EC	European Commission
EFA	Education for All
EPDF	Education Program Development Fund
FTI	Fast Track Initiative
FTIS	FTI Secretariat
GDP	Gross Domestic Product
GMR	Global Monitoring Report
GNP	Gross National Product
IDA	International Development Association
IF	Indicative Framework
ODA	Overseas Development Assistance
OECD DAC	Organisation for Economic Cooperation and Development Development Assistance Committee
PDD	Pole de Dakar
S&WA	South and West Asia
SSA	Sub-Saharan Africa
UIS	UNESCO Institute of Statistics
UK	United Kingdom
UPC	Universal Primary Completion
UPE	Universal Primary Education
USA	United States of America
USD	United States Dollar
WEI	World Education Indicator

A Introduction

1 Education financing in low income countries comes from two main sources: domestic funding (public and private) and external aid. The aim of this appendix is to present the analysis of recent trends in education financing from domestic sources and external aid that underpins the conclusions articulated in the Main Volume of the Synthesis Report, based on globally available data. In the context of external aid to basic education, the FTI trust funds are of particular interest and so are treated separately in **Error! Reference source not found.**

2 The momentum for the establishment of the FTI in 2002 came in the wake of the World Education Forum in Dakar in 2000. In order to start to build a picture of the potential contribution of the FTI initiative to the volume of education finance, it is necessary to compare data from the pre- and post-Dakar period. Where possible, the starting point for the trend data in this paper is 1999.

3 Within the group of low income countries, the FTI endorsed countries are of particular interest. Where appropriate, a separate analysis is presented for this group in order to discern any distinct trends. It is important to highlight that any differences observed between the endorsed group and the remaining low income countries are not necessarily caused by the influence of FTI. The group of FTI endorsed countries was not selected randomly from the population of low income countries; indeed part of the selection criteria was a perceived ability to perform well¹. This suggests that even without any FTI interventions, the FTI endorsed group might well out-perform the remaining group of low income countries on a range of financial indicators. The value-added of FTI to levels of financing for education will be principally assessed at the country level, where questions of causation can be explored by triangulating a range of quantitative and qualitative sources. For a country-level analysis see section **3C of the main volume.**

4 There are some important limitations to the global financial datasets examined in this appendix. In terms of domestic education expenditures, global-level trend data on private sources, such as households, are not readily available, and hence are not covered in this appendix. Country data are available from a variety of sources, but datasets presenting comparable data series across countries and over time are still relatively young. For these reasons, only a brief sketch of the major issues and significance of private finance in education is provided. Issues related to the definition of indicators, coverage and quality of data are touched on in the relevant places in this appendix, but a more comprehensive discussion is found in **Error! Reference source not found.** of **Appendix I.**

B Public finance

5 Obtaining data on domestic sources of public expenditure for education is not straightforward. Government revenue sets the envelope for public expenditure overall, and in many countries this is funded from domestic and external sources. Domestic revenue is driven partly by GDP growth, which influences tax receipts and other local sources. Education's share of government revenue (or total public expenditure) and primary education's share of this then determine the level of expenditure for education and primary education respectively. Table II.1 below sets out a list of commonly used public finance indicators relevant to education, but only three of these indicators explicitly exclude external sources of government revenue (indicators i, iv (excluding external grants) and v). Generally speaking, public expenditure analysis of education tends to include on-budget external sources of finance, partly because some forms of external finance cannot be explicitly

¹ The intention of selecting 'good performers' is embodied in the FTI framework document (FTI 2004d), which states on p4 that "The FTI is intended to provide more sustained, predictable, and flexible financial support to countries that have demonstrated commitment to the goal of UPC..."

allocated to specific sectors or items. Nonetheless, external sources are more often used to support capital expenditure, while domestic sources² tend to be used for current expenditure, and so indicator iv is perhaps the best measure of domestic effort for education in the absence of data on indicator v which excludes external grants.

6 The FTI's framework document emphasised the need to increase both domestic and external funding for education and sought to monitor both. The FTI developed a policy development and monitoring tool called the Indicative Framework (IF). This is based on analytical work carried out by the World Bank (Bruns et al 2003) which produced a set of benchmarks for key indicators; these are shown in the first column of Table II.1 below (this only contains the finance IF benchmarks, the full IF is in **Annex C**). The benchmark values are derived from average values for a set of high performing countries (in terms of reaching universal primary completion). The IF includes a measure of overall domestic revenue raising effort (indicator i) and a measure of the share of domestic resources for education (indicator iv excluding grants). Unfortunately only one of the key sources of education public finance data, the Pole de Dakar (PDD), reports on indicators which exclude external grants.

7 This chapter presents data on public finance for education from three sources: UNESCO Institute of Statistics (UIS); Pole de Dakar (PDD); and the Fast Track Initiative Secretariat (FTIS). Table II.1 below displays the indicators which are available from each source. Summary details on each source are given below:

- **UIS:** Provides a broad description of the education sector, including expenditures, and comprises a 'global dataset' in the sense that data are held internationally, applying standard definitions that allow comparisons across countries, and available for non-endorsed as well as endorsed FTI countries. Attempts are made to collect the data annually from 208 countries, but comprehensive information on expenditures is received from only around half of these. The most recent data are from 2006.
- **PDD:** Financial data relating to education from 2000 and 2005 for African countries (51 in total) were published in the Pôle de Dakar reports for 2004, 2005 and 2007³. Standard definitions are applied and adjustments made to the data to make them comparable across countries. Monetary amounts are expressed in millions of national currency units in constant prices⁴. The original sources of the data are IMF, World Bank Country Status Reports (CSR) and UIS, as well as some PDD estimates and projections. The dataset used in this paper has been supplemented by the GMR team using additional data from MINEDAF document statistique 2002.
- **FTIS:** Data from 2000 to 2007 for FTI endorsed countries (as at October 2008 there were 34 countries) made available by the FTIS. The data have been collected from a range of sources at country level, such as donor appraisals, country information forms and joint assessments. Country-specific indicators have been used and so there is no guarantee that the data are comparable across countries. Indeed there are some large differences between data found on particular countries in the FTIS database and standard UIS data for the same indicators and year (see **Error! Reference source not found.** of **Appendix I** for a comparison of sources).

² Sometimes including direct budget support. There are influential authors arguing that in reality, Budget Support (BS) is not used for recurrent costs – because governments balance their books so that recurrent costs are covered by domestic resources so in reality BS finances capital investment. Penrose takes this further to say that therefore donors should be much more concerned with the capital side of the budget than they usually are (Penrose 2008). If what Penrose argues holds, governments could well refuse additional BS (education earmarked and other) even if it were felt to be a good idea to use it to fund recurrent education costs. This would depend on the government's perception of the risk involved in financing recurrent costs with donor money, given the issues of medium/long term predictability and volatility of aid.

³ Published by UNESCO/BREDA.

⁴ Base year differs by country.

Table II.1 Public finance indicators for education

	FTI IF benchmark (%) ¹	Sources of data		
		UIS ²	PDD ³	FTIS ⁴
Public resource mobilisation				
(i) Government revenue (domestic) as a % of GDP	14-18 excluding external grants	X	✓	X
Public expenditure on education				
(ii) Public expenditure on education as % of GDP	X	✓ uses GNP	X	✓
(iii) Public expenditure on education as % of total public expenditure	X	✓	X	✓
(iv) Public current expenditure on education as % of total public current expenditure	20 including external grants	✓ ✓ ✓	X	✓
	20 excluding external grants	X	X	X
(v) Public current expenditure on education as % of government revenue (domestic)	X	X	✓	X
Public expenditure on primary education				
(vi) Public expenditure on primary education as % of total public expenditure on education	X	✓	X	X
(vii) Public current expenditure on primary education as % of total public current expenditure on education	42-64 including external grants	✓	✓	✓
(viii) Current spending on items other than teacher remuneration as % of total current spending on primary education	33	✓ uses total public exp on education (all levels)	✓	✓

Source: Notes: □ means indicators available; x means indicator unavailable. (1) FTI IF means Fast Track Indicative Framework. For indicator (iv) the IF states that total public current expenditure excludes non-discretionary expenditure (specified as interest payments on debt). For indicators (i) and (vii) the benchmarks contain a range of values, see the footnotes in Annex C for an explanation. (2) UIS means UNESCO Institute of Statistics For some of the indicators, UIS uses a different denominator; the differences are noted in the relevant box in the table. All UIS indicators include external grants in public expenditures. (3) PDD=Pole de Dakar. For indicator (i) and (v) the PDD defines government revenue as state revenues other than grants (external). (4) FTIS means Fast Track Initiative Secretariat. Only a very small number of countries reported data on indicators (i) & (vi) and so these have been classified as not collected. None of the indicators in the FTIS dataset explicitly exclude external grants.

8 Missing data is a serious problem for all three sources as summarised below (for a detailed discussion of data issues see **Error! Reference source not found.** of Appendix I):

- **UIS:** A review of the available data from 1999 to 2006 found that for all countries, the average annual percentage of missing observations on education expenditure indicators ranges from 45% to 88% depending on the indicator. For low income countries the situation is even worse. For this reason, the limited analysis presented below compares two year averages from 1999/00 with 2005/06 to maximise observations.
- **PDD:** Complete data on key indicators exist for only 33 countries out of 51 surveyed. All of the indicators discussed below are based on these 33. Missing data for 2000 ranges from 29% to 35% depending on the indicator. Missing data for 2005 ranges from 4% to 8% depending on the indicator.
- **FTIS:** Data for years prior to and after 2003-2006 are almost entirely absent (97% - 100% missing). For the years 2003-2006 the amount of missing data ranges from 27% to 98% of all observations, depending on the variable.

9 The countries in each dataset have been divided into three groups: (i) FTI countries that were endorsed by 2004 – this cut-off point was chosen because the end of the data series is 2005 or 2006 and it was not to be expected that FTI endorsement would necessarily register a noticeable effect in under a year; (ii) FTI countries endorsed after 2004 and FTI eligible countries – the OECD defined group of low income countries matches up pretty well with the FTI endorsed or eligible group, so these countries are mainly the remaining low income countries⁵; and (iii) FTI ineligible countries– all but eight of these are OECD defined middle and high income countries⁶. Full lists of 217 countries by FTI status, income category (as defined by OECD), and IDA category can be found in **Error! Reference source not found.** (**Error! Reference source not found.**, **Error! Reference source not found.**, **Error! Reference source not found.**, and **Error! Reference source not found.**). None of the sources reports on all the countries. summarises the number of countries reported on by each source by FTI status.

Table II.2 Number of countries by FTI status and data source

FTI status	Total countries from all datasets	Data source		
		UIS (all regions)	PDD (African countries)	FTIS
FTI endorsed by 2004	13	13	8	13
FTI eligible/endorsed after 2004	54	54	28	21
FTI ineligible	141	141	15	
Total	208	208	51	33

Sources: UIS 2009; Pôle de Dakar 2004; Pôle de Dakar 2005; and Pôle de Dakar 2007.

⁵ Seven Lower Middle Income countries are endorsed or eligible to be endorsed by the FTI: Albania, Georgia, Guyana, Honduras, Indonesia, Sri Lanka and Tonga.

⁶ Of the eight that aren't, six are Least Developed Countries (Cape Verde, DRC, Equatorial Guinea, Maldives, Samoa, Tuvalu) and two are Other Low Income countries (Democratic People's Republic of Korea and Uzbekistan). Four of these countries have achieved UPE (Cape Verde, Maldives, Samoa, Uzbekistan). Of the remaining four, one is in conflict (DRC) and one is North Korea.

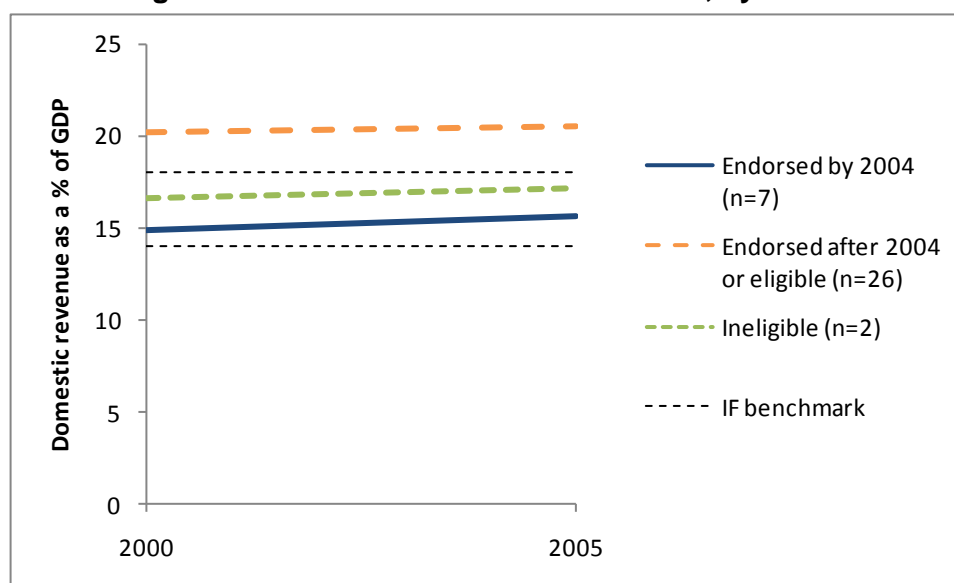
Results: comparison of FTI endorsed countries with other country groups

10 The next sections compare trends in various public finance indicators between early-endorsed countries, later-endorsed/eligible countries and ineligible countries. The results show some differences between the 'performance' of the different groups, but this *does not indicate that causality can necessarily be attributed to FTI*. Many other factors are likely to have impinged on the movements in indicators observed, and there is also a selection bias inherent in the timing of countries chosen for endorsement. Part of the selection criteria for early endorsement was a perceived ability to perform well. This suggests that even without any FTI interventions, the early-endorsed group might well out-perform the other group of low income countries on a range of financial indicators.

C Public resource mobilisation

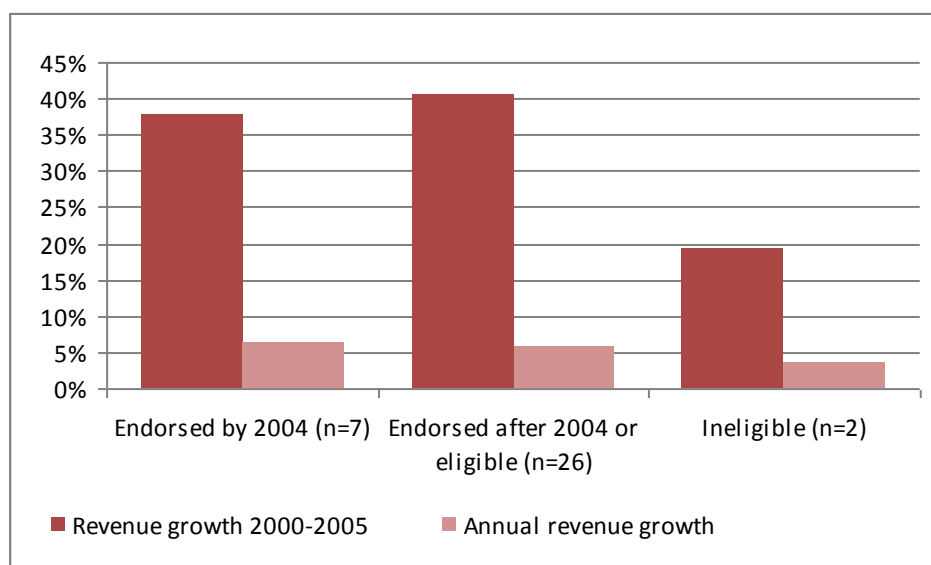
11 *Indicator (i) Government revenue (domestic) as a % of GDP (PDD data):* Figure II.1 below shows mean average domestic revenue as a percentage of GDP for African countries, disaggregated by FTI status. It demonstrates that on average early-endorsed countries fall within the IF benchmark band of 14%-18%, and have a slight upward trajectory towards the top of the band over the period. Roughly speaking, this means that they have improved their rate of tax pressure over the five years. By contrast, later-endorsed/eligible countries remain basically static on average in terms of proportion of GDP collected as domestic revenue, but sit above the IF benchmark by some two percentage points. There are too few observations with data to remark on the FTI-ineligible countries.

Figure II.1 Domestic revenue as % of GDP, by FTI status



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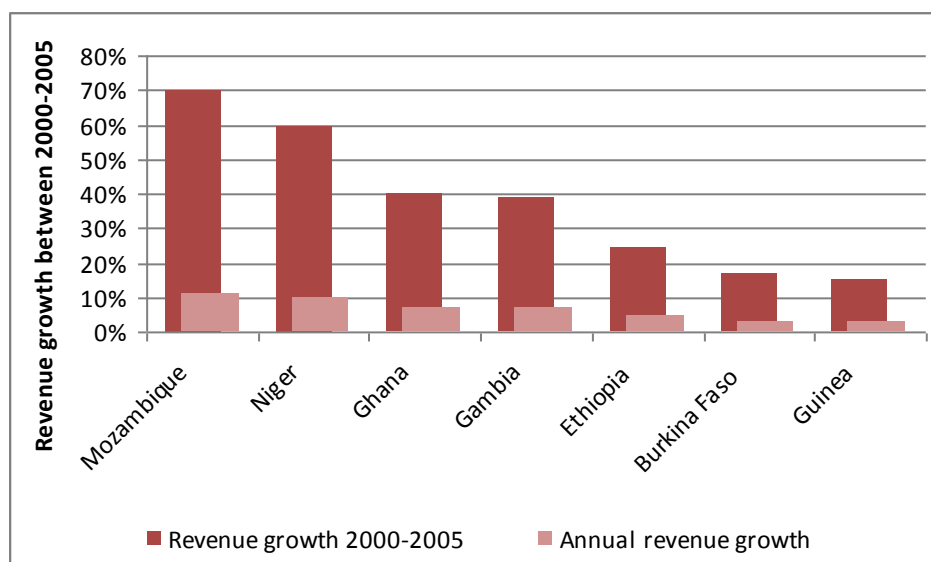
Figure II.2 Mean total and annual real revenue growth 2000-05 (%), by FTI status



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

12 Although there is a marked difference between the early-endorsed and late-endorsed/eligible groups in the proportion of GDP captured by their governments in domestic revenue (a proxy for tax pressure), in absolute terms the growth rates of domestic revenue were pretty similar. Both groups registered a healthy 6% per annum growth in domestic revenue on average in real terms (Figure II.2 above). However, within these country groups there is a wide variety of domestic revenue performance across the different countries, as shown by Figure II.3 and Figure II.4 below⁷.

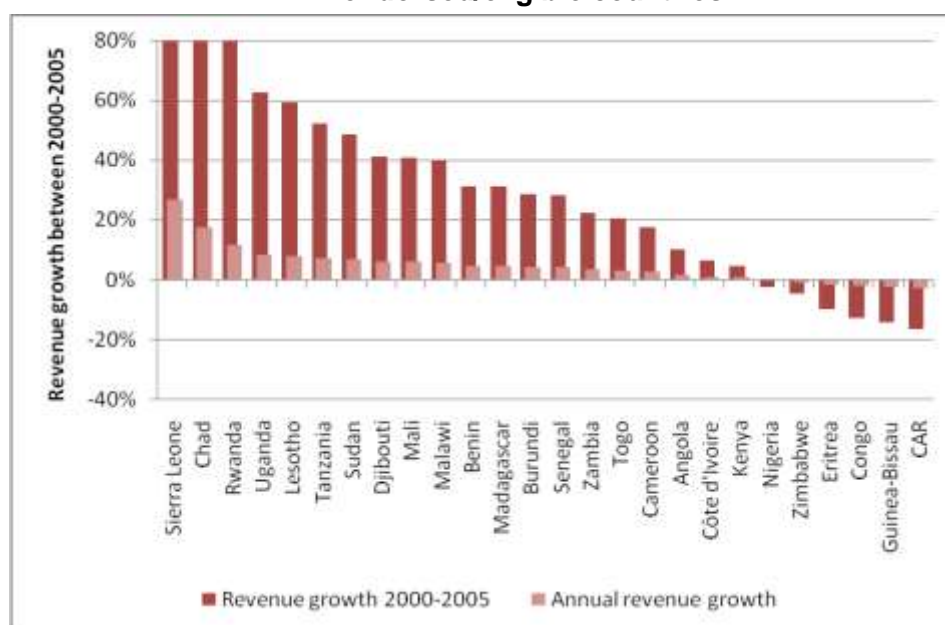
Figure II.3 Total and annual real revenue growth 2000-05 (%) for early-endorsed countries



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

⁷ In the later endorsed group, Sierra Leone and Chad represent particularly strong performers. Knocking them out of the mean calculation significantly alters the performance of the later endorsed group: total real revenue growth falls to 24% and mean annual compound growth to 4%.

Figure II.4 Total and annual real revenue growth 2000-05 (%) for late-endorsed/eligible countries



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

D Public expenditure on education

13 This section starts by putting public expenditure on education into the context of GNP, as a proxy for *government* effort in funding education. It is important to highlight, however, that this is not a proxy for *national* effort in funding education. In many countries household and other forms of private spending on education form a significant proportion of the total. A study in Bangladesh found, for example, that 61% of resources flowing into the primary subsector in 2003/04 were provided by government, while the rest were provided by households (not just parents) (FMRP, 2005). See section H on private finance below for further discussion.

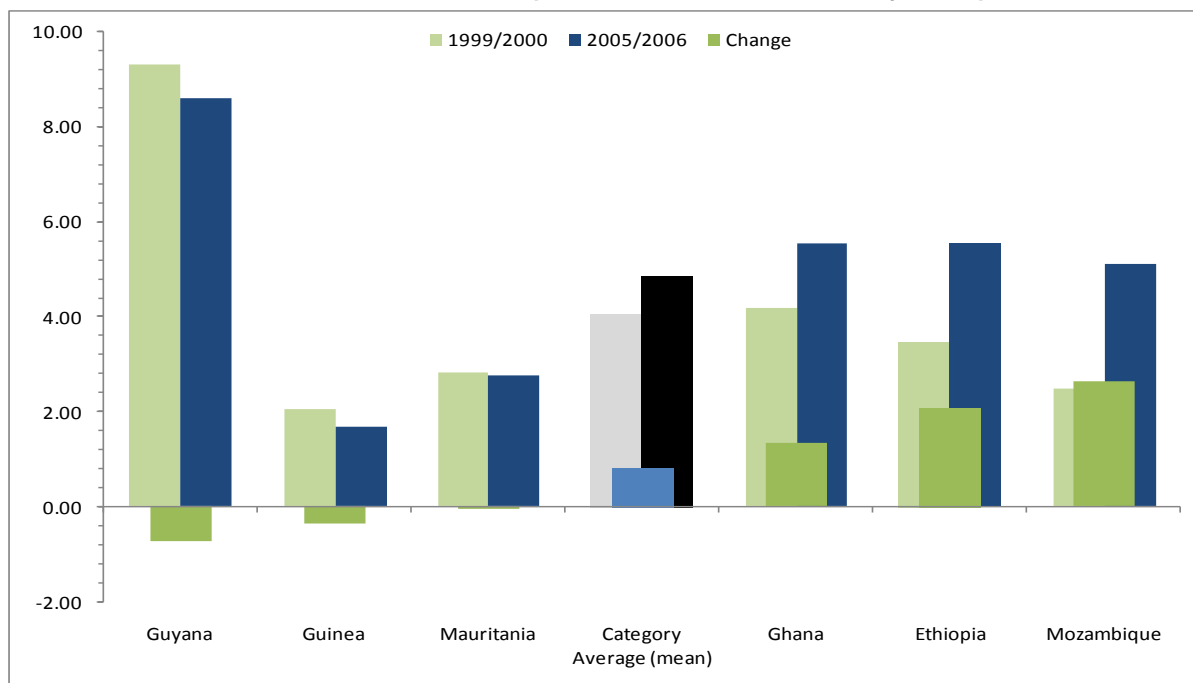
14 *Indicator (ii) Public expenditure on education as % of GNP (UIS data):* An increase in public expenditure on education as a share of GNP is generally a sign that public expenditure on education is rising, although this is contingent on positive GNP growth rates. Figure II.5 and Figure II.6 below contrast changes in this indicator between 1999/00 and 2005/06 for early-endorsed countries (46% of data available) and late-endorsed/eligible countries (44% of data available). Accepting the caveat that there is marginally more missing data for the latter group, it appears that the early-endorsed group have outperformed the later-endorsed/eligible group, with the former recording a mean gain of just under one percentage point, close to double that of the latter. Both groups started the decade from a similar position, with their governments spending about 4% of GNP on education on average.

15 The group of ineligible countries demonstrated a fairly even spread of positive and negative changes, with a mean change of 0.3 percentage points (**Error! Reference source not found.**). This group started the decade with public spending on education as a share of GNP about one percentage point higher than the other two groups at 5%.

16 Interpreting changes in this indicator is not straightforward. On the face of it, there might be concern that three of the six early-endorsed countries registered a fall in this indicator. But, starting points are relevant here: Guyana started the decade with a rate of over 9%, more than double the average for the early-endorsed group. Providing that GDP

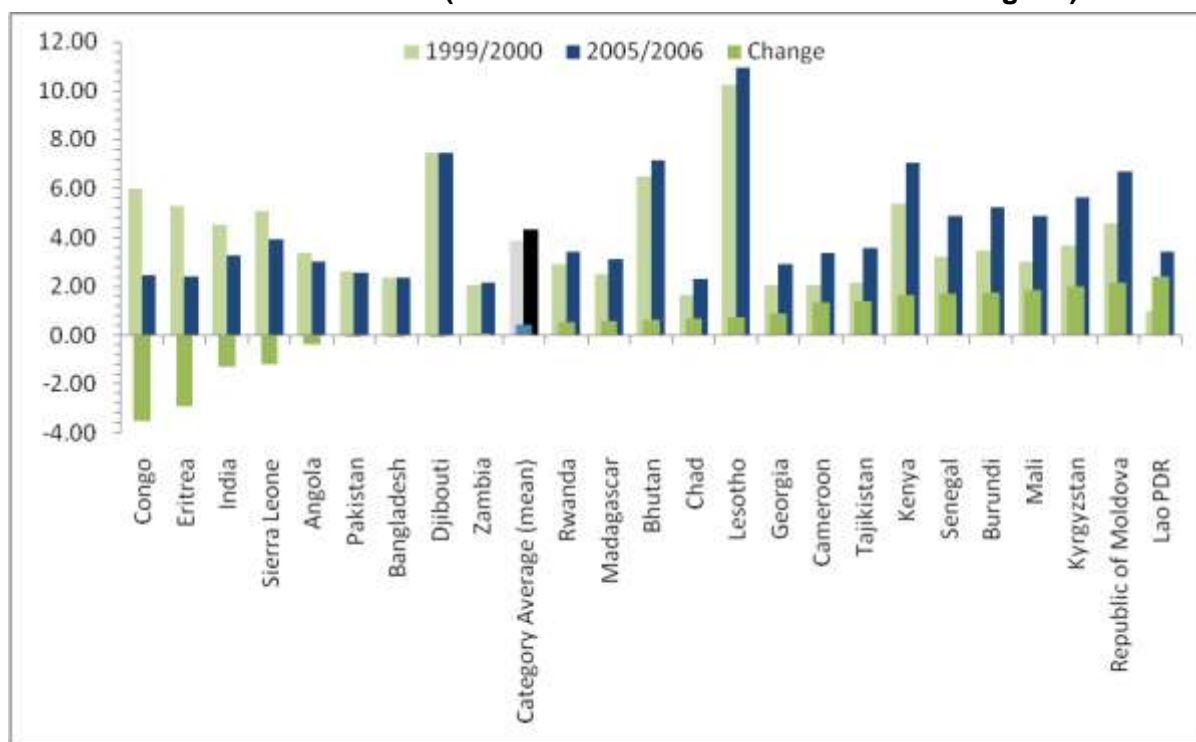
growth rates are positive, a fall in this indicator does not necessarily mean that expenditure on education has fallen in absolute terms. There may be a very rational reason for a government to choose to spend additional revenue, say from a healthy boost in GDP growth, on paying off high-interest loans for example (while still protecting absolute levels of expenditure on education). The same logic applies to the overall interpretation of the differing performance of early-endorsed countries compared with later-endorsed/eligible countries. Figure II.5 and Figure II.6 below indicate that there is no correlation between performance and starting point.

Figure II.5 Change in public education expenditure as % of GNI between 1999/2000 and 2005/2006 (FTI countries endorsed by 2004)



Source: **Error! Reference source not found.** Note: (1) Average = mean across all countries.

Figure II.6 Change in public education expenditure as % GNI between 1999/2000 and 2005/2006 (FTI countries endorsed after 2004 or eligible)



Source: **Error! Reference source not found.** Note: (1) Average = mean across all countries.

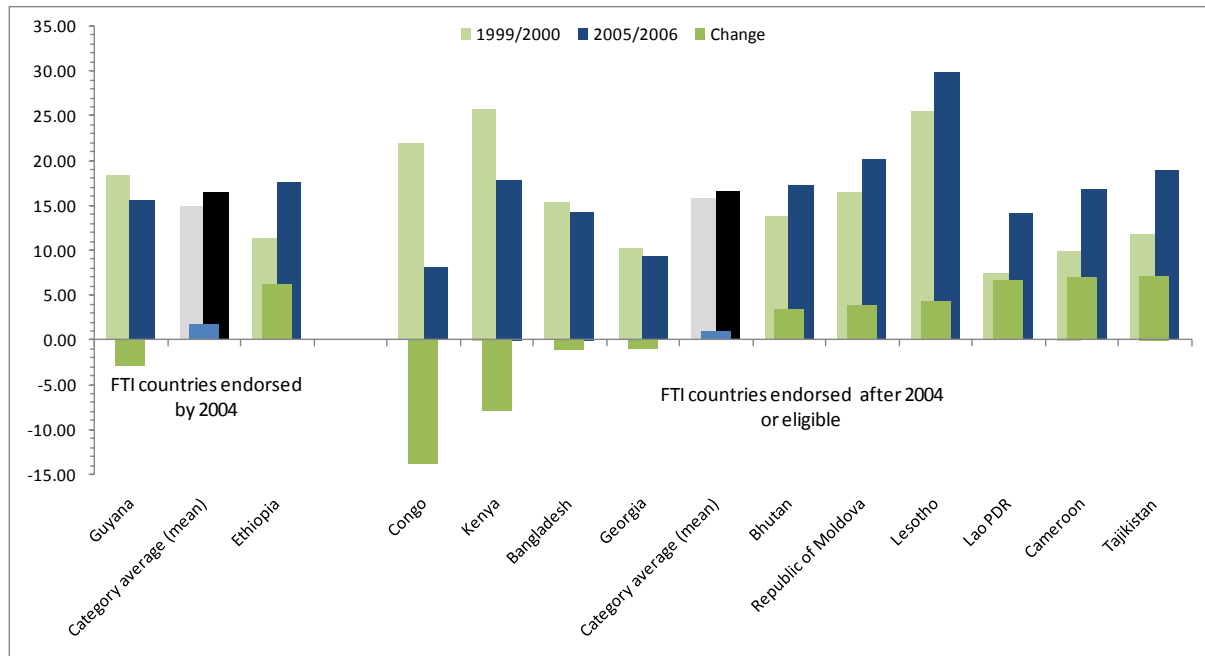
17 For early-endorsed countries, we see that while there are some big positive changes between 1999/2000 and 2005/2006 recorded by countries who start from a relatively low beginning (Ethiopia, Mozambique), equally there are some poor performers in this category (Guinea, Mauritania). At the top end of the scale we also see conflicting results. Moderate improvement from a relatively strong starting point is demonstrated by Ghana, whereas Guyana, from a very strong starting position, shows a decline of 0.72 percentage points; this might be interpreted simply as bringing down its indicator to a more sustainable level. In general, GDP growth rates, sustainability issues, government priorities, supply-side factors, all may influence the above indicator in different country contexts which the global data alone are not able to articulate.

18 A similar story is told by the later-endorsed/eligible countries. Some countries start from relatively high positions and drop quite markedly (Congo, Eritrea, India, Sierra Leone). Of these, many, but not all, are affected by conflict of one kind or another (India being the exception; Pakistan and Bangladesh also display marginally negative performances in the time period). Whereas Bhutan, Lesotho, Kenya, also start from relatively strong positions but still record positive trends. Of those countries starting from a low to moderate position, most record positive improvements, but a few (Pakistan and Bangladesh already mentioned, and also Angola) show negative trends, albeit marginal ones. The performance of FTI-ineligible countries also demonstrates this mixed picture (**Error! Reference source not found.**).

19 *Indicator (iii) Public expenditure on education as % of total public expenditure (UIS data):* One measure of the relative priority that a government accords to education compared with other demands is the proportion of total public expenditure spent on education. The change in this indicator between 1999/00 and 2005/06 is set out in Figure II.7 below for the early-endorsed countries (15% of data available) and later-endorsed/eligible countries (19% of data available). The degree of missing data rules out any direct comparisons. In one of the two early-endorsed countries with data, the indicator has fallen over the period, in the

other it has risen: in Guyana it declined by nearly three percentage points; in Ethiopia it rose by over six percentage points.

Figure II.7 Change in public education expenditure as % of total public expenditure between 1999/2000 and 2005/2006 (all FTI countries)



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20 Equally, the later-endorsed/eligible group tell a varied story. Taking Kenya as an example, a fall in education’s share of public spending by almost eight percentage points would appear to indicate a fairly serious shift in government priorities away from education. However, qualitative evidence suggests quite the opposite – free primary education was instituted after the 2002 elections, and free secondary education was a major manifesto pledge across all parties in the 2007 elections. Standing at 26% at the start of the decade, Kenya’s share of the public purse spent on education was substantially higher than the average for the early-endorsed group (15%), later-endorsed/eligible group (16%) and the ineligible group (15%). A fall from such a high rate might have been driven by efficiency improvements, and rational concerns about sustainability. As with the previous indicator, it is important to emphasise that a fall in this indicator does not necessarily imply that spending on education has fallen in absolute terms.

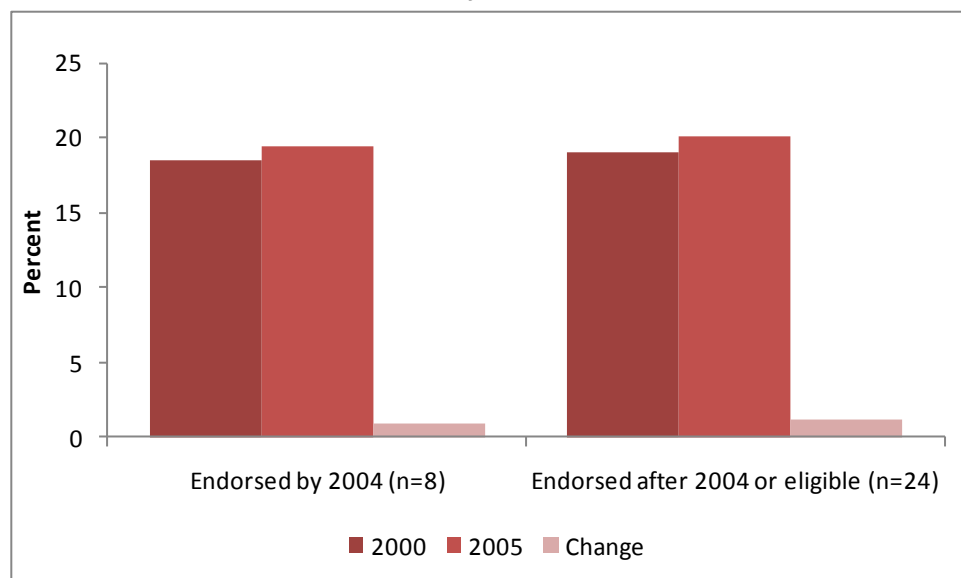
21 The group of FTI ineligible countries demonstrates a fairly even spread of positive and negative changes, with a mean change of 0.1 percentage points (**Error! Reference source not found.**). Note that even for the group of ineligible countries, which is largely constituted by middle and high income countries, less than one third of data was available.

22 *Indicator (iv) Public current expenditure on education as % of total public current expenditure (UIS data):* There is insufficient data to present any results against this indicator.

23 *Indicator (v) Public current expenditure on education as % of government revenue (domestic) (PDD data):* At the start of the decade both groups of African FTI countries spent about 18% of their domestic government revenue on current education expenditures on average. By 2005, this share had risen by about one percentage point for both groups (Figure II.8 below). Against the backdrop of similar growth rates in government revenue over the five years for both groups, this translates into real growth in current education resources of about 8% per year on average (Figure II.9 below). This rate of resource growth is considerably higher than school-aged population growth rates in many countries, and

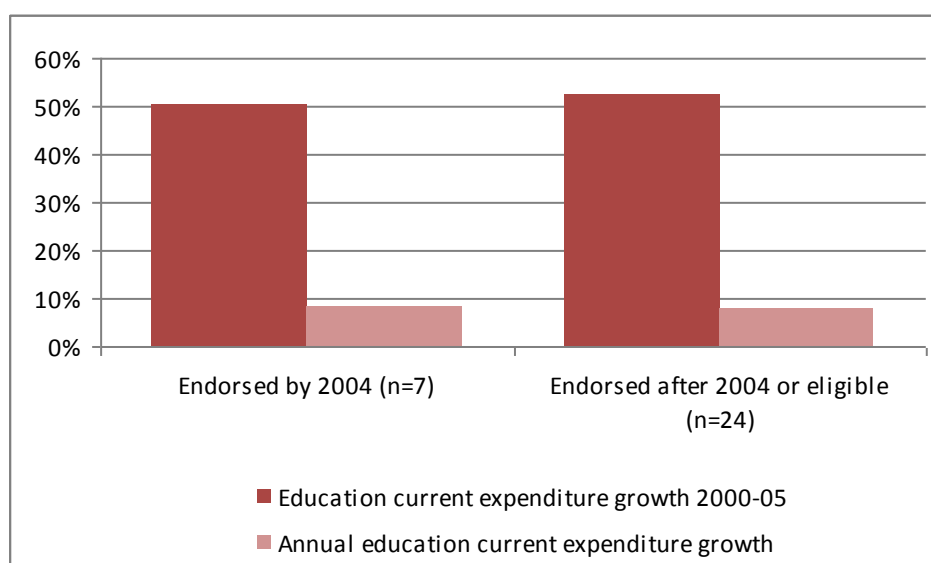
suggests that current expenditure on education per *child* (financed from domestic resources) has grown considerably in many African countries. It is important to highlight, however, that this doesn't automatically mean that there has been comparable growth in current expenditure on education per *student*. In countries where education systems are rapidly expanding from a base of low intake rates, and/or those where repetition rates are rising, enrolment growth can outstrip school-aged population growth by a considerable margin. (There are not enough observations in the PDD data to compare the FTI groups against FTI-ineligible countries. For individual country data see **Error! Reference source not found.**)

Figure II.8 Public current expenditure on education as % of government revenue, by FTI Status



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

Figure II.9 Total and annual real education current expenditure growth 2000-05, by FTI status



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

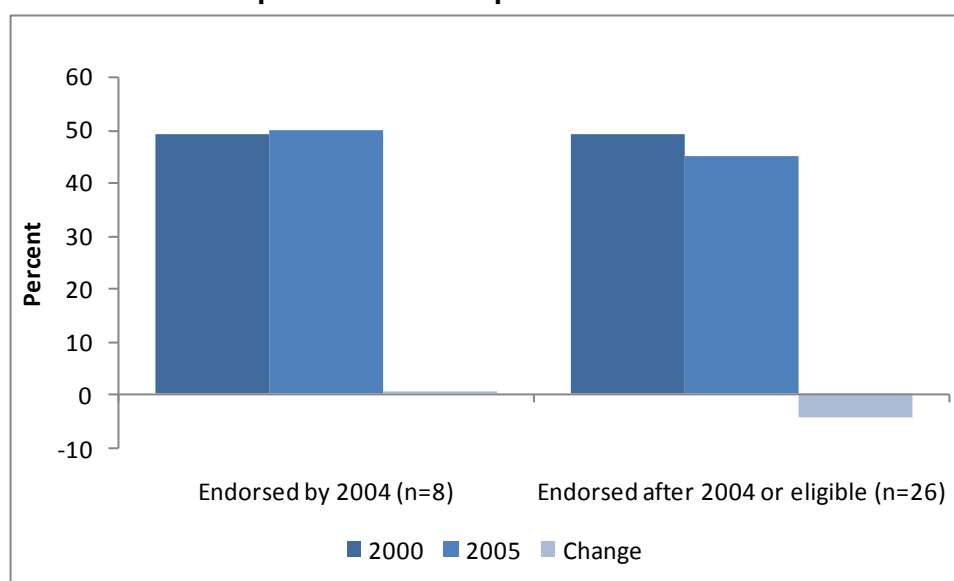
E Public expenditure on primary education

24 There is not enough data to present any analysis of indicators (vi), (vii), or (viii) from the UIS data.

25 *Indicator (vii) Public current expenditure on primary education as % of total public current expenditure on education (PDD data):* At the start of the decade both groups of African FTI countries devoted 49% of current expenditure on education to the primary subsector on average. This is well within the FTI IF benchmark band of 42-64%. Five years later, the early endorsed countries had registered a modest increase in this indicator (about half a percentage point), while the later-endorsed/eligible group recorded a considerable fall of four percentage points on average (Figure II.10 below). On the face of it, this suggests a shift in priorities within the education sector away from primary education for the later-endorsed/eligible group, although as with the other indicators this may not be the explanation in some countries.

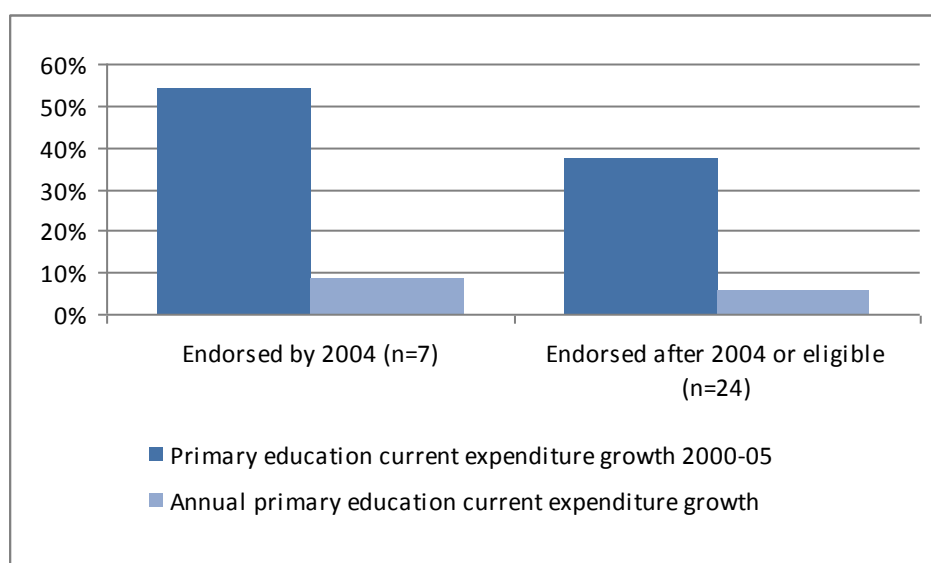
26 Given that there was not much difference between the FTI groups in the growth of current education expenditure over the five years (Figure II.9 above), the downward shift in the proportion spent on primary education in the later-endorsed/eligible group translates into a much lower rate of annual growth in primary current spending (6%) compared with the early endorsed group (9%) (Figure II.11 below). (There are only data on one FTI ineligible country (Cape Verde). For individual country data see **Error! Reference source not found.**)

Figure II.10 Public current expenditure on primary education as % of total public current expenditure on education



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

Figure II.11 Total and annual real primary education current expenditure growth 2000-05, by FTI status



Source: **Error! Reference source not found.** Note: (1) Annual rates show mean compound annual growth rate over the period.

Summary

27 Based on a sample of 33 African countries, which were split into two groups, early-endorsed and later-endorsed/eligible countries, the data show strong real growth in current expenditure on education financed from domestic sources over the first five years of the decade (about 8% per annum on average for both groups). This appears to have been largely driven by GDP growth since there has been little change in the proportion of GDP captured as domestic revenue (although the early-endorsed group showed a slight upwards trend) or the share devoted to current expenditure on education. There has, however, been a marked shift downwards in the share of current education expenditure going to primary education in the later-endorsed/eligible group. This led to a sizable difference between the groups in the rate of real growth in current primary spending (9% per annum for the early-endorsed group vs. 6% per annum for the later-endorsed/eligible group).

28 There is a general difficulty in interpreting the meaning of changes in public finance indicators which measure 'shares' rather than 'levels' of expenditure, particularly at a global level. While there is merit in monitoring trends in these indicators, since sharp changes may well signal movement in government priorities and/or levels of spending, additional information is needed from countries to understand if this is indeed the case. In addition it is important to recognise that some indicators are likely to be moving in different directions depending on the stage of development of a country's education system. Take indicator (vii) *share of primary education in total current public expenditure on education*, as an example: if a country is starting from low primary education intake rates and rapidly expanding its system, this indicator would be expected to increase in the short- to medium-term. But, in the longer-term, the larger cohorts of graduates from the primary cycle would put pressure on expansion of the secondary cycle, and indicator (vii) would be expected to fall to make way for comparatively high growth in spending on secondary education.

Results: Movement of FTI endorsed countries towards or away from selected IF benchmarks

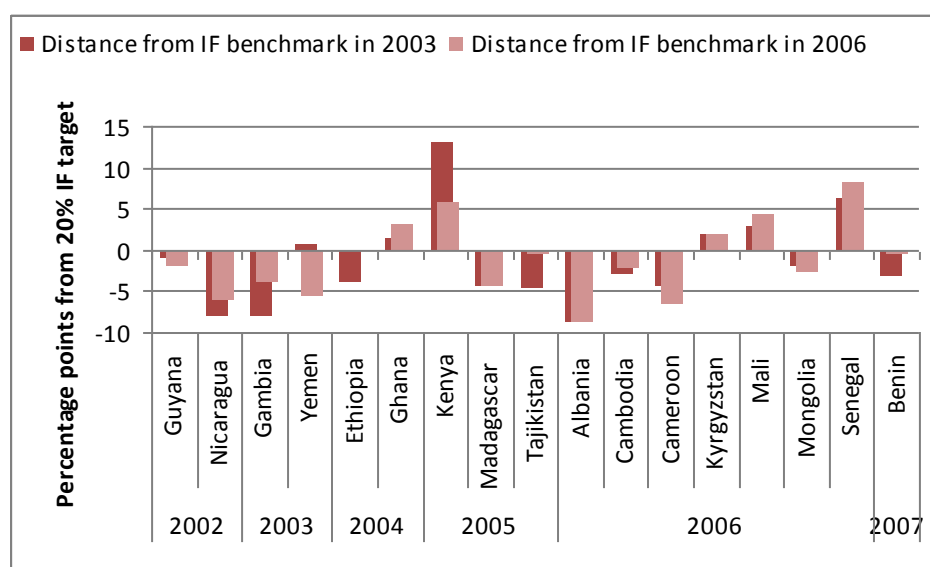
29 This section draws on data from the FTIS database. It presents data on a country-by-country basis, since, as previously discussed, the indicators are not necessarily calculated in exactly the same way in different countries (for more details see discussion in **Error! Reference source not found.** of **Appendix I**). Indeed there are some large differences between data found on particular countries in the FTIS database and standard UIS data for the same indicators and year. Furthermore, the data are not consistently different, i.e. the difference between the two sources for the same country may be positive one year and negative the next. This implies that some of the country-level data being reported to the FTIS are not consistently calculated each year for the same indicator (see **Error! Reference source not found.** of **Appendix I** for a comparison of sources).

30 The objective of the analysis is to see if endorsed countries have moved towards the FTI IF benchmarks over time, and also whether the year of endorsement appears to make a difference. It is important to emphasise that a judgement is not being made about whether a particular country's movement towards or away from a benchmark is a positive or negative development, for the reasons discussed already⁸. In addition, causality for any differences observed between early- and later-endorsed countries cannot necessarily be attributed to FTI. Many other factors are likely to have impinged on the movements in indicators observed, and there is also a selection bias inherent in the timing of countries chosen for endorsement.

31 *Indicator (iv) from FTIS: public current expenditure on education as % of public current expenditure.* For 17 endorsed countries, Figure II.12 below shows each country's distance from the FTI IF benchmark of 20% in 2003 and 2006, with countries ranked according the year of endorsement. Eleven countries were below the benchmark in 2003 and in 2006. Of the original eleven, six moved closer to the benchmark, while four moved further away. One country (Ethiopia) moved up to reach the benchmark exactly, but was replaced by another (Yemen) which fell from a position above the benchmark to six percentage points below it. Three of the six countries above the benchmark in 2003, increased their share of current expenditure going to education even further (Ghana, Mali and Senegal). In short, there is a mixed picture and the conclusion *cannot* be drawn that endorsed countries appear to be moving systematically towards the benchmark. Indeed, the year of endorsement does not appear to make much difference to the pattern of changes observed.

⁸ For further discussion of the Indicative Framework, including the extent to which it was used by countries in the case study group, see **Annex C**.

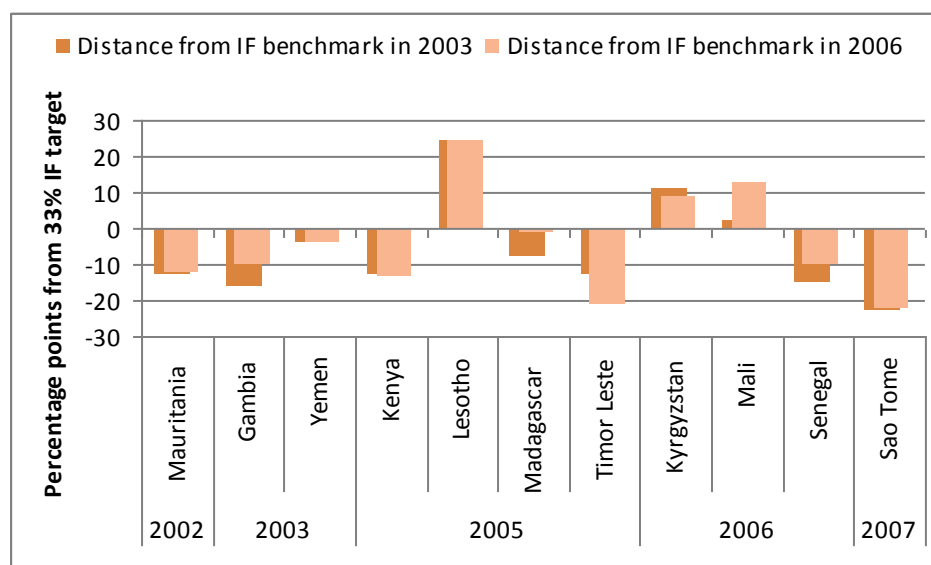
Figure II.12 Public current expenditure on education as % of total current expenditure: distance from IF target in 2003 and 2006



Source: FTI Secretariat.

32 *Indicator (viii) from FTIS: Current spending on items other than teacher remuneration as a % of total current spending on primary education.* The FTI IF benchmark for this indicator is 33%. Figure II.13 below shows that out of the eleven endorsed countries with data on this indicator, eight are below the IF benchmark in both 2003 and 2006. This means that none of the eight countries have moved up to reach or exceed the benchmark by the end of the three year period. In fact, more than half of the countries (six) are 10 or more percentage points below the benchmark in both years. At the extremes, Sao Tome and Principe is over 20 percentage points below the benchmark while Lesotho is 25 percentage points above the benchmark in both years. Nonetheless, over the three years, there has been movement towards the benchmark in seven out of eleven countries. The three countries in the 2002 and 2003 endorsed groups all moved towards the benchmark, while the picture has been more mixed with the countries endorsed later than this. Without more data it is not possible to say if this pattern is more widespread.

Figure II.13 Share of current primary education spending used on inputs other than teachers (%): distance from IF target in 2003 and 2006



Source: FTI Secretariat.

F External aid

33 This section looks at overall trends in aid commitments to education, and, within this, the priority given to basic education. It compares the current volume of aid for basic education with recent estimates of the external financing required to achieve the EFA goals. It presents a separate analysis of education aid trends for the six largest donors to basic education and highlights the considerable differences between them. The final subsection takes the group of FTI countries that were endorsed up to 2004 and looks at patterns of aid commitments to basic education pre- and post-endorsement. The important issue of how aid for education is distributed between countries is dealt with in the sub-section Distribution of external aid, which aims to draw out some of the equity implications of current education aid patterns.

34 Full information on the data sources used in the following analysis is provided in **Error! Reference source not found.** of Appendix I. In brief, the calculations rely on the data supplied by the GMR⁹, which cover the period 1999-2007 in the case of commitments, and the period 2002-2007 in the case of disbursements¹⁰, in constant 2007 USD. The original source of these data is the OECD-DAC creditor reporting system (CRS).

35 The following two figures, show total (rather than just direct) aid flows to education and basic education. These broader definitions include assumptions about the use of aid flows that are not strictly assigned to education or basic education (following the convention adopted by the GMR, and later the FTIS). In particular:

- Total aid to education = Direct aid to education plus 20% of direct budget support;
- Total aid to basic education = Direct aid to basic education plus 10% of direct budget support plus 50% of direct aid to education not specified by level.

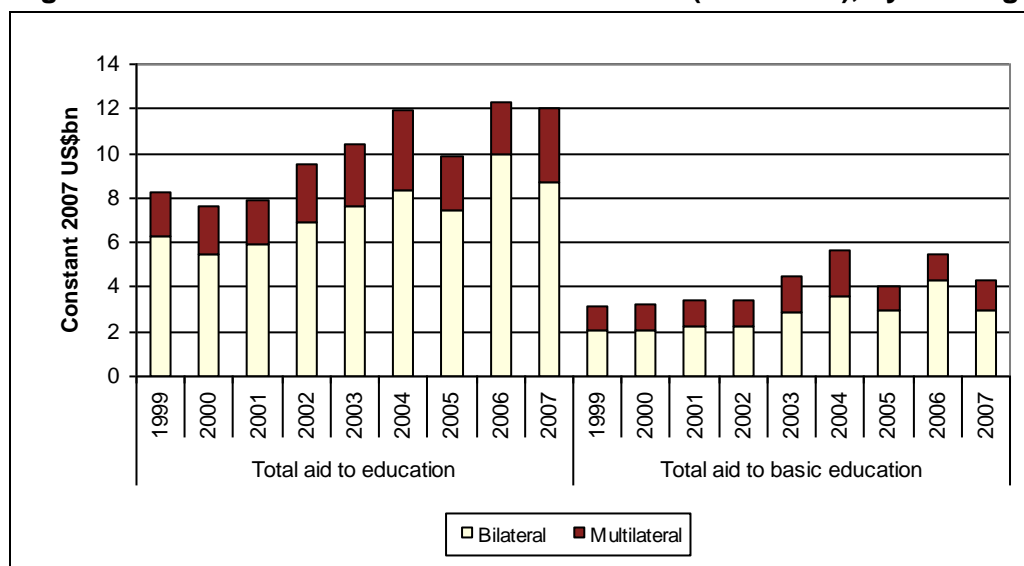
⁹ To be used in the 2010 GMR. The GMR has made certain adjustments to the education aid data for France and Japan. Details of these can be found in Table G.14 of Rawle, Georgina. *Mid-Term Evaluation of the EFA Fast Track Initiative Working Paper 2: Finance and Public Financial Management*, 2009. There is also an adjustment for Germany for the year 2005, Germany's adjustment is only for 2005, to include the missing imputed student costs to post sec ed which was reported in the DAC database for 2005 but not in the CRS.

¹⁰ The disbursement data are not complete because of gaps in the reporting by some multilateral donors. This section mostly concentrates on commitments for this reason.

Aid commitments and disbursements to education

36 Aid commitments increased significantly between 1999 and 2004 both to the education sector (by 45% to USD 12 billion) and to the basic education sub-sector (by 80% to USD 5.6 billion), as Figure II.14 below illustrates. Since 2004 there has been almost no growth in aid commitments to education: there was a sharp drop in 2005, followed by a return more or less to the 2004 levels by 2007. Recent trends in basic education are even worse. By 2007, aid levels to basic education were 25% lower than they were in 2004 at their peak.

Figure II.14 Aid commitments to education (1999-2007), by donor group



Source: **Error! Reference source not found.**

37 Aid commitments to education grew at a similar rate to overall aid commitments in the 1999-2004 period, with the result that education's share of total aid was running at a fairly consistent rate of 10/11% (**Error! Reference source not found.**). This suggests that the observed growth in aid commitments to education in the first five years was the result of the general increase in aid rather than a shift in priority assigned to the education sector. The post-2004 period tells a different story. Overall aid commitments continued to grow in 2005 and 2006, while education's share of total aid fell to 7% and 9% respectively. It appears that education lost ground to other sectors during this period. However, in 2007, overall aid commitments dipped and education regained its 10% share of the total¹¹.

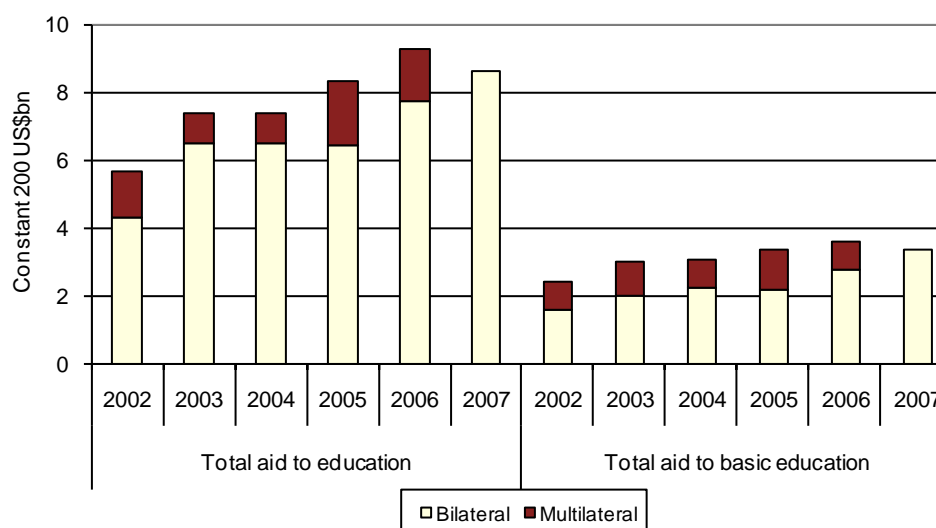
38 The priority accorded to basic education within overall education commitments has oscillated over the period 1999 to 2007 (**Error! Reference source not found.**). In 1999 the share of basic education in total aid to education stood at 38%, peaked at 47% in 2004 and was down to 35% in 2007. In other words there is *no* evidence of a consistent shift towards basic education within the education aid envelope since the start of the decade.

39 Aid commitments are often lumpy because they capture multi-year forward commitments in the year that they are agreed. This makes the interpretation of commitment trends rather difficult; for example, part of the rise in aid commitments observed in various years may be explained by a move by donors towards longer multi-year commitments, which would be consistent with international agreements on strengthening aid effectiveness (see,

¹¹ The GMR 2003/4 reports that, over the course of the previous decade (1990-1998) the bilateral share of aid to education in total aid grew marginally from c.8.2% to c.9.5%, although in real terms both bilateral aid to education and total aid fell considerably (see GMR 2003/4, pp232-233).

for example, the Paris declaration on aid effectiveness (OECD, 2005)). Aid disbursements, on the other hand, are more straightforward to interpret. Disbursements reflect actual resources released in a particular year. Noting that full data are not available for 2007, Figure II.15 below shows that disbursements have increased since 2002, although not consistently: they dropped in 2004, albeit only marginally, but had more than regained their 2003 level by 2005. They increased again in 2006 and look likely to have increased even further in 2007.

Figure II.15 Aid disbursements to education (2002-2007¹), by donor group



Source: **Error! Reference source not found.** Note: (1) Reliable disbursement data are not available before 2002 from the OECD-DAC CRS. It is for this reason that the GMRs have not presented disbursement data from before 2002 either. The EC is the only multilateral agency consistently reporting data on disbursements to the OECD-DAC secretariat. The GMR 2009 used unofficial disbursement data from its own survey of multilaterals to present total aid disbursement figures (p210 Figure 4.6). These figures have been converted into constant 2007 USD and multilateral disbursements are calculated as the difference between the total and bilateral figures. (2) Complete disbursements data for multilateral aid are not yet available for 2007.

40 Disbursements lag behind commitments by some years and therefore it is not surprising to find that disbursements to education are lower than commitments in a situation where the latter have experienced a period of growth in the recent past¹². The link between commitments and disbursements is emphasised in the 2009 GMR (UNESCO 2008a p210) which warns that "...there is a risk that the slowdown in growth in commitments since 2004 will soon be reflected in slower growth or stagnation of disbursements."

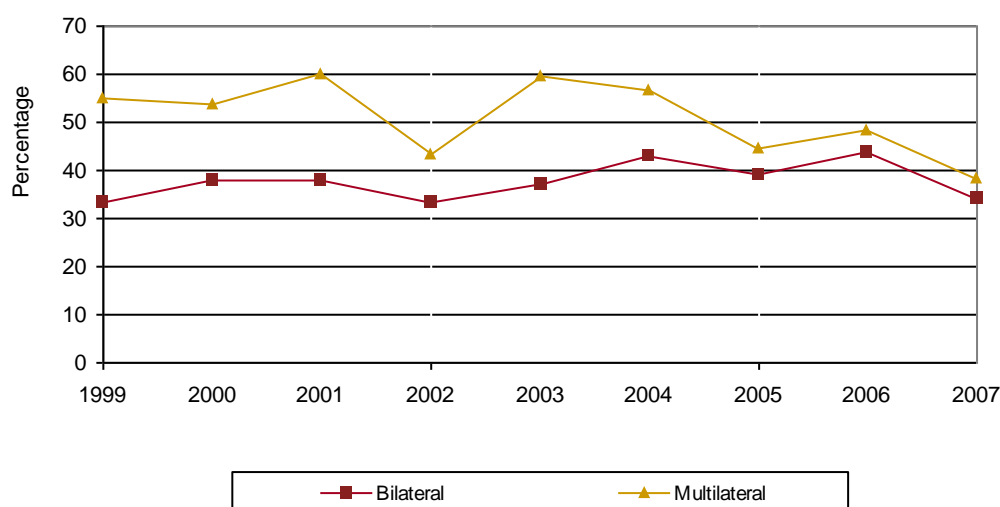
41 How do these global aid trends for education compare with estimates of the resources needed to reach international education goals? For basic education, various studies have estimated the cost, and the external funding requirements, of reaching selected EFA goals. The 2007 GMR estimated that the total volume of external aid needed to substantially meet EFA goals (including universal primary education and gains in early childhood and adult literacy) is USD 11bn per annum (2003 prices). It is clear that there is a large gulf between aid commitments to basic education as they stand (average of USD 4.6bn per annum between 2005 and 2007) and estimates of what is needed to reach the EFA goals.

¹² The ratio of commitments to disbursements over the period is slightly higher for basic education (1.5 on average) compared with education overall (1.4 on average) (**Error! Reference source not found.**).

Trends in education aid commitments by donor

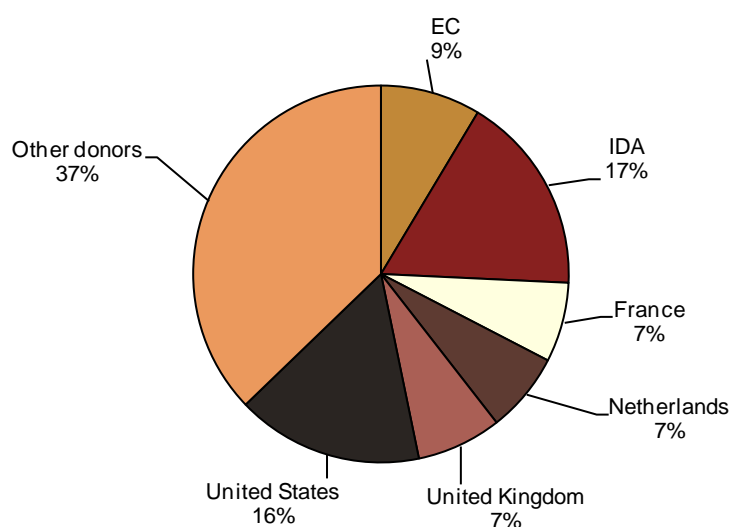
42 Within total aid to education, the priority accorded to basic education is somewhat different for bilateral and multilateral donors as Figure II.16 below demonstrates. In 1999 the share of total education aid commitments going to basic education was 55% for multilaterals and 33% for bilaterals. Eight years later the shares are much closer. Up until 2006 bilateral donors had shifted their education priorities towards basic education, although in 2007 this shift regressed sharply back to 1999 levels. Over the eight years, multilateral donors have reduced their basic education share quite dramatically to 38%, although there have been some large fluctuations in this indicator over the period.

Figure II.16 Share of basic education in total education aid commitments 1999 to 2007 (%)



Source: **Error! Reference source not found.**

43 In addition to comparing the groups of bilateral and multilateral donors, it is also useful to contrast the changes in aid flows to education for individual donors. Figure II.17 below reveals that six donors provide the majority of aid to basic education. Taken together, their commitments to basic education accounted for almost two thirds of the total in 2007. This group comprises two multilaterals (EC and IDA) and four bilaterals (France, Netherlands, UK and USA). The concentration of aid to basic education amongst a few donors was even more marked in 1999 where the six largest donors accounted for nearly three quarters of basic education commitments (**Error! Reference source not found.**). Of the then six largest donors, Japan and Norway have been replaced by the Netherlands and the USA. In fact, during the period, the Netherlands made huge strides in moving up the ranking of donors to basic education, from eighth place in 1999 to first place in 2006 (**Error! Reference source not found.**).

Figure II.17 Distribution of basic education commitments 2007, by donor

Source: **Error! Reference source not found.**

44 The drivers of the comparatively large increase in commitments to basic education since the start of the decade by the Netherlands are evident in Table II.3 below. This table compares two-year averages for key indicators from the beginning, middle and end of the seven year period for each of the main donors¹³. The big story for the Netherlands, however, is told between the years of 1999-00 and 2005-06, when it more than doubled its overall aid commitments, almost doubled the proportion of aid going to education, and increased basic education's share of its education aid by 10 percentage points (**Error! Reference source not found.**). No other donor comes close to matching this dramatic shift in commitment towards education and basic education in particular.

¹³ The reason for presenting two year averages is to smooth out commitment data, which are often lumpy.

Table II.3 Real trends in total aid commitments and the proportion allocated to education and basic education for a selection of large donors

Donor	2000-2001 ¹	2003-04 ¹	2006-07 ¹
EC			
Total aid (Constant 2007 USDm)	10,042	10,589	13,468
Aid to basic education (Constant 2007 USDm)	397	381	352
Education as % of total aid	7	8	6
Basic ed as % of total ed	50	45	41
IDA			
Total aid (Constant 2007 USDm)	9,226	11,864	11,139
Aid to basic education (Constant 2007 USDm)	595	1,144	690
Education as % of total aid	11	14	14
Basic ed as % of total ed	57	67	47
France			
Total aid (Constant 2007 USDm)	4,651	7,961	9,374
Aid to basic education (Constant 2007 USDm)	348	341	318
Education as % of total aid	30	22	22
Basic ed as % of total ed	25	20	16
Netherlands			
Total aid (Constant 2007 USDm)	4,305	3,204	8,076
Aid to basic education (Constant 2007 USDm)	299	210	771
Education as % of total aid	10	11	14
Basic ed as % of total ed	73	59	63
United Kingdom			
Total aid (Constant 2007 USDm)	5,618	5,766	8,722
Aid to basic education (Constant 2007 USDm)	377	712	623
Education as % of total aid	9	14	11
Basic ed as % of total ed	74	83	60
United States			
Total aid (Constant 2007 USDm)	11,631	24,617	24,824
Aid to basic education (Constant 2007 USDm)	289	523	548
Education as % of total aid	4	3	3
Basic ed as % of total ed	66	76	74

Source: **Error! Reference source not found.** Note: (1) all figures are 2 year averages.

45 Looking at the volume of overall aid, the four bilateral donors displayed much stronger growth than the two multilaterals. Two of the bilaterals (France and USA) more than doubled aid commitments over the period, while the Netherlands almost doubled theirs. Multilateral aid grew by about 28% on average.

46 There is a marked variation in both the starting point and changes seen over the period in the priority accorded to education, and to basic education, within each donor's overall aid envelope. In 2000-01, at the extremes, France committed 25% of education aid to basic education compared with 74% by the UK, although these shares translated into similar absolute amounts of aid for basic education. Over the period the USA displayed a marked increase in the share of education aid going to basic education. This is reflected in a large absolute increase in basic education aid commitments. In absolute terms, The Netherlands and the UK also provided a large additional amount of aid for basic education over the period, but in both cases basic education's share of total education aid fell considerably¹⁴. In other words growth in aid volumes for basic education was largely driven by strong overall growth in aid, not a shift in priorities within the education aid envelope¹⁵.

47 In contrast, the EC and France recorded an absolute decrease in aid commitments to basic education between the start, middle and end of the period, as well as a substantial fall in the share of education aid going to basic education (this indicator stands at just 16% for France in 2006-07 compared with 74% for the USA)¹⁶. The data on IDA reveal a more complicated story. From the start to the middle of the period, overall aid commitments rose by just under 30% and were at roughly the same level at the end of the period. There was a very large spike in aid to basic education in the middle of the period (2003-04), and at the same time the proportion of education aid going to basic education shot up. However, by the end of the period basic education's share of education aid had dropped markedly, and in absolute terms IDA shows only a modest increase aid to basic education between the start and end of the period. The full breakdown of aid commitments to basic education by year for each of the main donors is displayed in **Error! Reference source not found.**

48 If we consider, briefly, the three biggest donors to the FTI Catalytic Fund (CF), The Netherlands, Spain and the UK, whom together constitute 71% of all signed pledges since inception of the CF to end 2008, we can ask whether increases in their support to basic education are entirely accounted for by pledges to the CF, or whether they constitute an increase in their bilateral programmes as well. In the case of Spain, over the period in which it was making pledges to the CF between 2005 and 2007, total pledges accounted for 88% of net increases to direct aid to basic education. The same figure for the UK, which made a single pledge of USD133m in 2006, is 33%. For The Netherlands, the picture is complicated by a huge spike in direct aid to basic education in 2006, followed by an even larger decline in 2007 (**Error! Reference source not found.**). The picture thus presented for each of the three largest donors to the CF varies by donor. The lion's share of Spain's increased support to the sector was indeed accounted for by its contribution to the CF. This was much less the case for the UK, whose pledges account for only one third of its increasing support. For The Netherlands, in the years where direct aid to basic education increased (2004-2006), the CF accounted for approximately one quarter of that increase. In 2007 when direct aid to basic education decreased, pledges to the CF offset this decrease to the tune of 15%.

¹⁴ In both cases while the share of basic education in total education has been fairly sporadic, the sharpest decline was registered between 2006 and 2007. This decline can also be accounted for by commitments those countries made to the FTI CF: the UK pledged USD129m in 2006, representing more than the difference between its 2003-04 and 2006-07 averages, while The Netherlands pledged USD430m between 2004 and 2007, and still increased its aid to basic education in real terms by 158%.

¹⁵ It should be noted that while the apparent share of aid to basic education in aid to education fell, both overall and for many donors, there has been an increase in both multisectoral aid and aid to education unspecified by sub-sector; in fact, these two sectors demonstrate two of the top three in terms of biggest gains since 2004 (see **Error! Reference source not found.**). Given the assumptions that underpin our calculation of 'total' aid to education and basic education, it could well be that in reality the proportion of aid from these two sectors actually going to basic education is different to the proportion used in our assumption model.

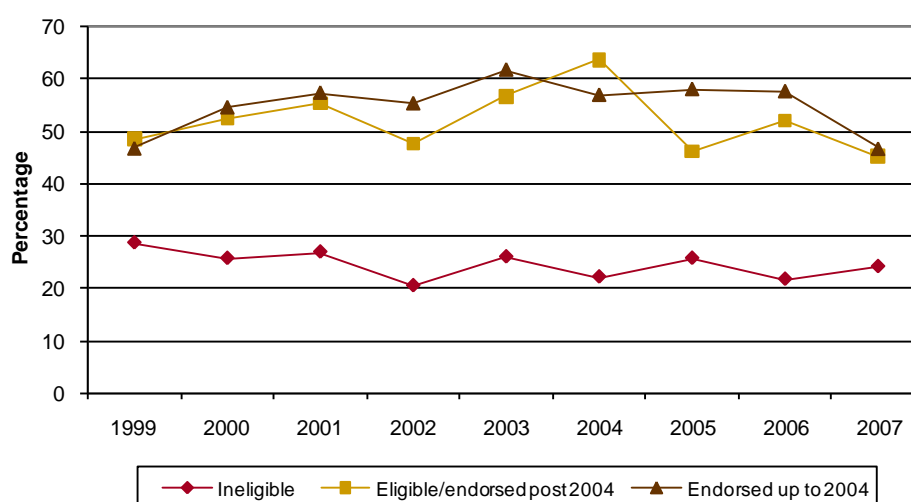
¹⁶ Over the period 1999-2007 both France and the EC have increased aid to budget support modalities, including multisectoral aid and GBS. The EC has also significantly increased its aid to education unspecified. France aid to education unspecified has almost trebled since 2002; although aid to this sector spiked in 2001 and 1999, in comparison to which, aid in 2007 seemed meagre (in 1999 aid to education unspecified stood at USD 1.068bn (constant 2007 prices), compared to just USD 124m in 2007).

Trends in education aid by FTI status

49 One of the objectives of the FTI endorsement process was to act as a trigger that would set off increasing volumes of aid to basic education. Demonstrating such a link requires an analysis of long-term time series, which are not yet available. However, the following figures present a first look at the issue. The first figure examines differences in the priority accorded to basic education within education aid, between countries grouped by their FTI status. There are three FTI status groups: (i) countries endorsed by FTI between 2002 and 2004 (13 countries). This subset was selected so that there would be a minimum of three years of data after the time of the endorsement; (ii) countries endorsed after 2004 or eligible for FTI (55 countries); (iii) countries ineligible for FTI (112 countries). The latter group almost entirely comprises middle- and high-income countries (see **Error! Reference source not found.** for a list of countries by category). It is important to note that even if clear differences are observed between the country groups they are not necessarily caused by participation/non-participation in FTI.

50 In 1999 both the early-endorsed countries and the later-endorsed/eligible countries had a similar proportion of education aid going to basic education (47% and 48% respectively) while the ineligible group's figure was much lower at 29%. Figure II.18 below plots trends in this indicator for the three groups and reveals that in 2000 the early-endorsed group climbed above the later-endorsed/eligible group and remained there (with the exception of 2004) until 2007 when similar shares were again recorded (47% for early-endorsed group and 45% for the later-endorsed/eligible group). The ineligible group remained well below the other two groups and followed a downward trajectory reaching a share for basic education in total education aid of 24% by 2007. In short, it appears that basic education was accorded a comparatively higher priority in education aid in the early-endorsed countries for most of the eight year period compared with the other two groups, and the difference is more marked in the post 2002 period (although as noted before, this is not necessarily because the countries participated in FTI early on).

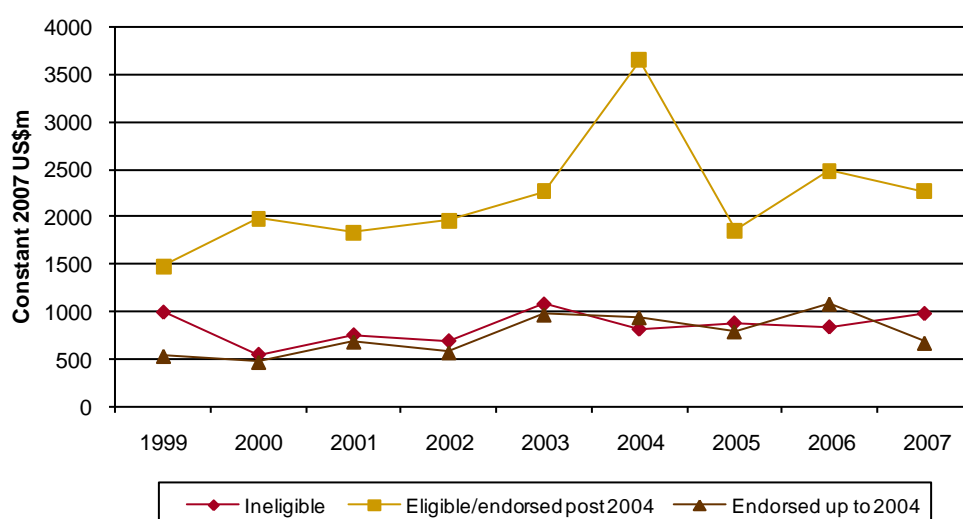
Figure II.18 Trends in share of basic education in total education aid by FTI status, 1999-2007



Source: **Error! Reference source not found.**

51 Looking at trends in real levels of aid to basic education by FTI status group, Figure II.19 below reveals that real growth in basic education aid between 1999 and 2007 was higher on average for the later-endorsed/eligible group than for the other two groups. Aid to basic education grew from USD 1,482m to USD 2271m (53%) in the former group, from USD 535m to USD 672m (26% growth) in the early-endorsed group, and remained at about USD 990m in the ineligible group. Of course these start and end years hide trends in between, but the later-endorsed/eligible group also outstripped the other two groups in terms of annual average real growth in aid to basic education (11% p.a. for the later-endorsed/eligible group, 8% p.a. for the early-endorsed group and 4% p.a. for the ineligible group).

Figure II.19 Real trends in total aid to basic education by FTI status, 1999-2007

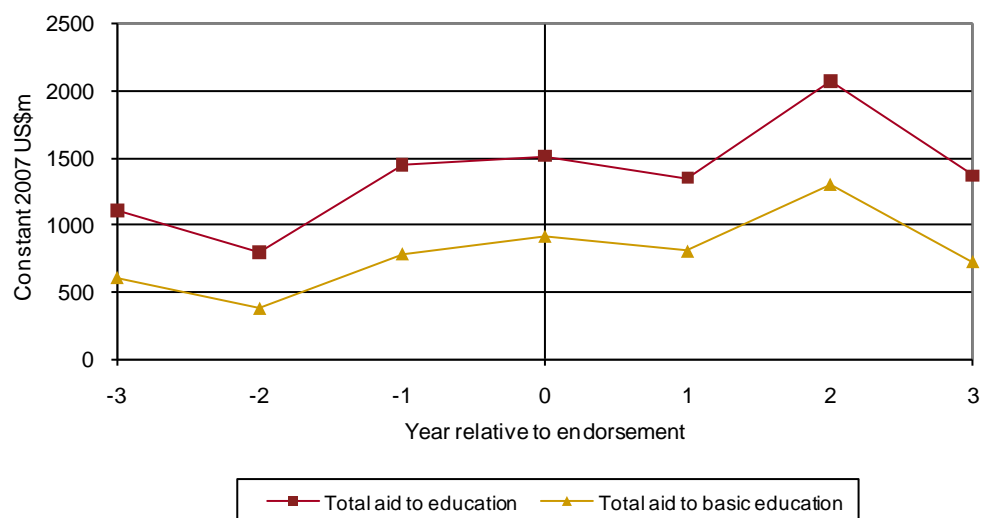


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52 Within the group of early endorsed countries, the year of endorsement varies from 2002 to 2004. Figure II.20 below shows the absolute levels of aid to education and basic education for this subset of early endorsed countries in relation to their year of endorsement (for mean figures see **Error! Reference source not found.**). Year 0 on the horizontal axis is the year of endorsement. The figure reveals a slight drop in aid commitments to basic education in the year following endorsement, followed by a sharp rise in the second year (the pattern is almost identical for total aid to education). In the third year after endorsement the volume of aid flows take a drastic turn downwards, ending up below their levels in the year prior to endorsement. In other words, there is *not* a consistent upward trend in aid flows to education or basic education following endorsement for the early group of endorsed countries¹⁷.

¹⁷ Excluding Viet Nam from the group of early endorsed countries, as the single largest recipient of aid overall, the picture changes due to the large decline in commitments to Vietnam in these years which was the single factor bringing down the trend for all countries. Without Vietnam, aggregate total aid to education rises by 8% for all countries between year 0 and year 3, and aggregate total aid to basic education rises by 15%.

Figure II.20 Aid commitments to education and basic education in countries endorsed by the FTI until 2004



Source: **Error! Reference source not found.**

53 The aggregate pattern of pre- and post-endorsement aid flows to education in the early-endorsed group is the result of a wide variety of individual country trends; see **Error! Reference source not found.** and **Error! Reference source not found.** This aggregate evidence, which is unable to discern causality in aid flows, is complemented by country case studies which look directly at whether there is a plausible association between FTI endorsement and subsequent aid flows in the countries concerned.

Summary

54 In summary, aid commitments to basic education grew markedly in real terms between 1999 and 2004, with most of the growth taking place after 2002. By 2007, they had fallen by almost 25% below their 2004 level. There is a large gulf between aid commitments to education as they stand and estimates of what is needed to reach EFA goals. The priority given to basic education with the overall education aid envelope has oscillated over the eight year period since 1999.

55 For individual donors there have been considerable changes in aid commitments to basic education over the period. Of the six largest donors to basic education, the USA stands out as having made significant increases in the share of their education aid commitments devoted to basic education; although it should also be acknowledged that the share of aid to education in USA total aid commitments is comparatively tiny (average around 3% compared to other selected donors average of around 10%, with France averaging 27%). The USA, The Netherlands and the UK have all greatly increased absolute levels of aid to basic education. On the other hand, the EC and France appear to have shifted their aid priorities away from basic education¹⁸. Basic education commitments from IDA show more of a mixed picture: there was a very large spike in aid to basic education in the middle of the period (2003-04), but it showed only a modest increase between the start and end of the period overall. This mix of donor effort in financing basic education has meant that the substantial step increase in levels of aid made by some donors has simply helped to keep aggregate levels of aid to basic education from falling too drastically in the latter part of the period.

¹⁸ This appearance is deceptive, however, as both donors have moved towards budget support aid modalities, as well as significantly increasing aid to education unspecified, more of which than is accounted for in these data may well go to basic education (see footnote 16).

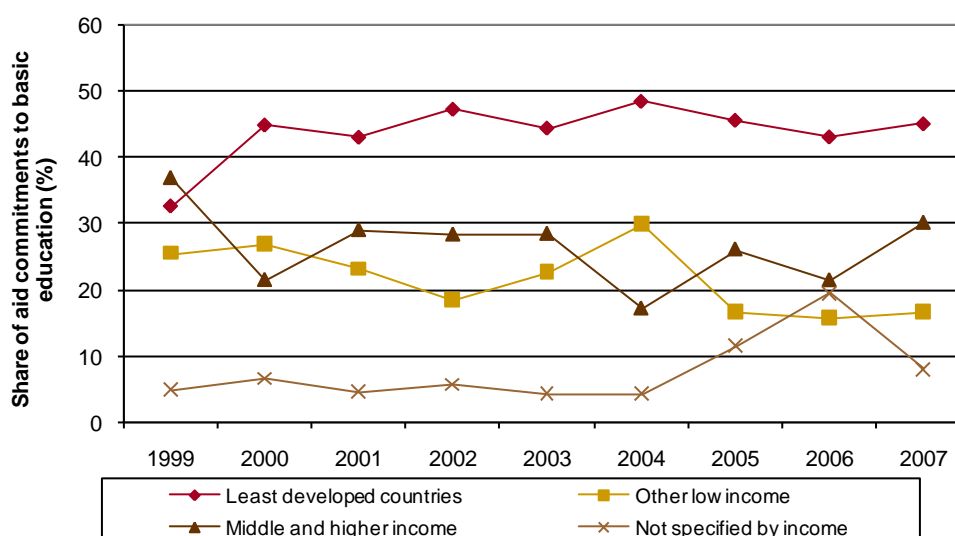
56 There is not a consistent upward trend in aid flows to education or basic education in the years following endorsement for the early group of endorsed countries on average. In fact, by the third year after endorsement, total aid to education and basic education for these countries was actually below where it was one year prior to endorsement. There is also a wide variety of individual country trends underpinning the average for this group. These are explored in the evaluation's country case studies which use quantitative and qualitative evidence to assess the extent to which trends in aid flows have been influenced by FTI endorsement.

G Distribution of external aid

57 This section investigates the distribution of external finance for basic education between various country groups. It uses some basic indicators of need, such as average country income, and the number of out-of-school children to try to establish how equitable the allocation of aid for basic education is, and how this distribution has changed over the eight year period since 1999. It also looks specifically at the group of early endorsed FTI countries to see if individual donors have prioritised these countries in their basic education aid.

58 It would be expected that the emphasis towards achieving the EFA goals and the momentum around the FTI would result in a growing share of aid for basic education going to the poorest countries. Figure II.21 below shows the distribution of aid to basic education from 1999 to 2007 among three groups of countries ranked by their average income: lowest (least developed, 49 countries), low (other low income, 18 countries) and middle or higher income (100 countries), plus one group where the aid has not been classified by country and hence cannot be allocated by income group (17 non-country specific groups)¹⁹. The figure reveals that, in line with the objectives of EFA, the share of total aid commitments for basic education going to least developed countries increased, although the gains made were largely achieved in the period 1999-2002. During this early period, the share of basic education aid committed to other low income countries fell, and, despite a gain between 2002 and 2004, this group's share fell fairly sharply in 2005 and remained static in the following two years.

Figure II.21 Distribution of aid commitments to basic education (1999 to 2007), by country income group



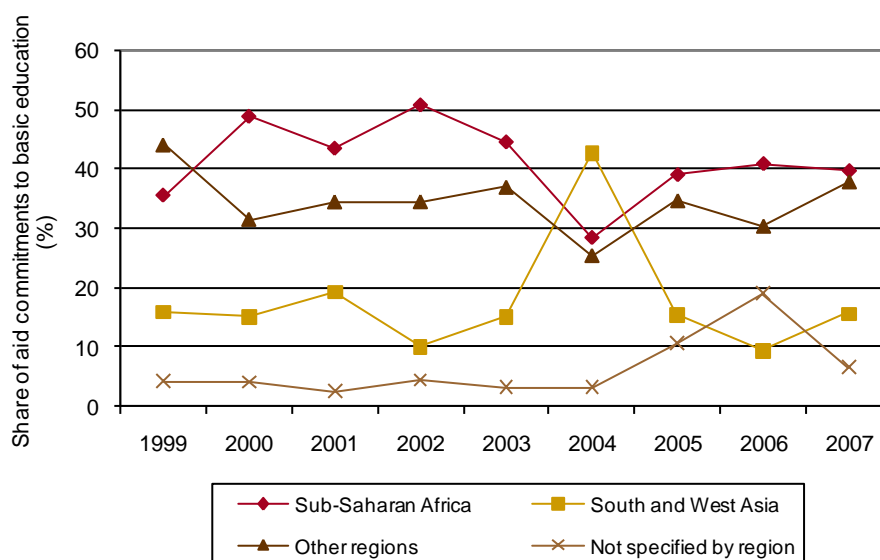
¹⁹ This differs slightly from the number of countries given in the public finance data sources.

Source: **Error! Reference source not found.**

59 It is worth noting that at the start of the period, middle- and higher-income countries accounted for the largest share of aid commitments for basic education (37%), some four percentage points higher than the share to the least developed countries. By the end of the period, the situation was very different with the least developed countries taking 45% of aid commitments to basic education compared with 30% for the middle- and higher-income countries. This indicates that aid priorities for basic education have shifted towards the poorest countries over the period, but there is no evidence to suggest that this change accelerated in the post-FDI period (it is possible that a high proportion of the aid attributed to the non-specified by income category was in fact allocated to the least developed and low income countries; this group's share increased sharply in 2005 and 2006, but fell off again 2007).

60 Turning to the geographic distribution of aid commitments to basic education, Figure II.22 below breaks down aid to basic education by three geographical regions, Sub-Saharan Africa (SSA), South and West Asia (S&WA), and the other regions of the World, plus one category where the data are not specified by region. SSA contains almost half of the World's out-of-school children (47% in 2006, see **Error! Reference source not found.** in **Error! Reference source not found.**) and for most of the period, SSA received the largest share of aid to basic education, reaching a peak of more than 50% in 2002 (the exception was in 2004 when it briefly fell below S&WA). It is worrying to note, however, that the trend since 2002 is downwards, and SSA's share of basic education aid stood at only 40% in 2007. Apart from a spike in 2004²⁰, the S&WA region, received between 10 and 20% of aid for basic education during the period. Given that S&WA is the region with the second largest out-of-school child population (24% in 2006), it does not appear to get its fair share of the aid for basic education according to this crude criteria. On the same basis, the other regions, which account for the remaining out-of-school children (29%), are comparatively well off in terms of their share of aid for basic education (38% in 2007).

Figure II.22 Distribution of basic education commitments (1999 to 2007), by region



Source: **Error! Reference source not found.**

²⁰ This is due largely to spikes in commitments to India (USD468m), Bangladesh (USD246m) and Nepal (USD43m) from the UK in that year. The IDA also significantly increased its basic education aid to these countries, with commitments of USD585m, USD219m, and USD61m respectively. The IDA also committed USD101m to Pakistan that year. In addition, Denmark, Japan, The Netherlands, Sweden and the US all made significant increases relative to their usual levels of aid to basic education to the region in 2004.

61 The analysis in chapter two revealed that different donors have different preferences for funding basic education. Some donors have significantly increased their commitments to basic education over the past eight years, while others have cut back. Has the increased aid largely gone to the poorest countries, while reductions have affected the comparatively rich countries? Have the early FTI endorsed countries particularly benefited from increased aid? In order to answer some of these questions, Table II.4 below presents aid commitments to basic education, for the six main donors (in 2007), by three country groups: (i) countries endorsed by FTI up to 2004 (13 in total); (ii) countries eligible for FTI and those endorsed after 2004 (55 in total); (iii) countries not eligible for FTI (99 in total), plus a non-specified group (17 observations)²¹. As highlighted earlier, the third group almost entirely comprises middle and high income countries, while the first two FTI groups largely contain the least developed and other low income countries²².

62 At the start of the period, several donors allocated fairly high proportions of their aid for basic education to the comparatively rich countries that are not eligible for FTI (Table II.4 below). France stands out particularly in this respect: in 2000-01, France allocated more than a third of its aid to basic education to countries which are not eligible for FTI. The USA allocated almost one third, and the Netherlands one fifth on this category. By the end of the period, the Netherlands had dramatically reduced the share of its aid going to the ineligible group (to 4%), while France and the USA increased theirs markedly (each ending the period allocating close to 45% of total aid to basic education to FTI ineligible countries). The EC began the period allocating 14% of its aid to basic education to countries that were ineligible for FTI support, but ended it allocating 47% to that group.

63 The group of early-endorsed countries have seen a large increase in aid for basic education from the Netherlands and the UK since 2000-01. In contrast, France and IDA recorded a large absolute decline in basic education commitments to the early-endorsed countries between the middle and end of the period. (Both the EC and the USA committed very little aid to basic education to this group over the period.) Anecdotal evidence suggests that the IDA has been reducing its commitments to basic education in some FTI endorsed countries as a result of commitments from the CF to finance basic education. It is possible that this partly explains the downward trend in IDA basic education commitments to the early-endorsed group.

64 Three donors have made substantial increases in basic aid commitments to the later-endorsed/eligible group of countries since 2000-01: IDA, USA and the Netherlands. Basic education aid provided by IDA and the USA to this group grew substantially between the start, middle and end of the period. The Netherlands registered a large increment in basic education aid to this group between the start and end of the period, but a large drop between the start and middle point.

65 The large amounts of aid in the 'not specified' category for the Netherlands and UK partly reflect their contributions to the FTI CF.

66 In summary, overall aid priorities for basic education have shifted towards the poorest countries in the eight years since 1999, but almost all of the movement occurred in the period before FTI was launched. On the basis that SSA contains the highest proportion of the World's out-of-school children, it seems appropriate that it received the highest proportion of aid commitments to basic education for most of the period. On the same basis, S&WA does not appear to get its fair share of basic education aid. This apparent inequity may not be specific to the education sector. S&WA contains several large (highly populated) countries, and it is well documented that aid per capita is often less for large countries.

²¹ This differs slightly from the numbers of countries in the public finance datasets.

²² There are six LDC/OLIC countries that are not eligible for FTI and seven LMICs that are eligible for FTI. The former are: (LDCs) Equatorial Guinea, Maldives, Samoa, Tuvalu; (OLICs) People's Republic of Korea, Uzbekistan. The latter are: Albania, Georgia, Guyana, Honduras, Indonesia, Sri Lanka and Tonga.

67 The analysis of individual donor aid to basic education revealed that most of the largest donors (exceptions being the UK and the Netherlands) have reduced the amount of aid to basic education given to early-endorsed FTI countries over the period since 1999. The USA, IDA and the Netherlands have all clearly raised their basic education commitments towards the poorest countries over the period, but the USA has also sharply increased both the share and the absolute amount of its basic education aid to the comparatively rich group of countries that are not eligible for FTI, as has France and the EC.

Table II.4 Real trends in aid commitments to basic education for selected donors, by FTI country status

Donor	2000-01 ¹		2003-04 ¹		2006-07 ¹	
	Basic education aid	Share	Basic education aid	Share	Basic education aid	Share
	Constant 2007 USD	%	Constant 2007 USD	%	Constant 2007 USD	%
EC						
FTI endorsed up to 2004	49	12	46	12	21	6
FTI eligible/endorsed post-2004	281	71	189	50	160	45
Not eligible for FTI	56	14	138	36	164	47
Not specified	12	3	7	2	7	2
IDA						
FTI endorsed up to 2004	212	36	259	23	136	20
FTI eligible/endorsed post-2004	281	67	366	66	534	77
Not eligible for FTI	14	2	38	3	20	3
Not specified	-	0	-	0	-	0
France						
FTI endorsed up to 2004	50	14	142	42	31	10
FTI eligible/endorsed post-2004	174	50	142	42	134	42
Not eligible for FTI	122	35	56	16	137	43
Not specified	2	1	1	0	16	5
Netherlands						
FTI endorsed up to 2004	37	12	42	20	176	23
FTI eligible/endorsed post-2004	191	64	91	43	263	34
Not eligible for FTI	59	20	70	33	30	4
Not specified	23	4	7	3	302	39
United Kingdom						
FTI endorsed up to 2004	20	5	105	15	233	37
FTI eligible/endorsed post-2004	296	79	495	70	191	31
Not eligible for FTI	50	13	91	31	48	8
Not specified	12	3	20	3	152	24
United States						
FTI endorsed up to 2004	36	12	40	8	38	7
FTI eligible/endorsed post-2004	96	33	157	30	244	45
Not eligible for FTI	88	30	265	51	234	43
Not specified	69	24	60	12	32	6

Source: **Error! Reference source not found.** Note: (1) The aid commitment figures are all two year averages.

H Private finance

68 The issue of private finance in education is varied and complex. At the outset an important distinction must be drawn between public financing of private agents, and private financing of public (or private) institutions. On the former there is a vigorous debate around the benefits and detriments of the use of Public-Private Partnerships (PPPs) in the education sector, which it is not appropriate to enter into here. Nor is this the place to engage in a comprehensive analysis of the issue of private household finance in education. Rather the intention must merely be to define the basic contours of the issue and try to signal its significance relative to public education expenditure.

69 This section thus looks briefly at various dimensions of the issue of private finance and provision of education. It first considers the broad issues around collecting data on private finance. Then it offers a brief description of some of the main datasets. Next it relays short summary discussions of private provision of education services and private finance in education, and sketches the relative significance of these aspects to the education sector more broadly. It concludes with a discussion of the implications of this issue for FTI.

Data collection

70 Data on private household expenditure on education is costly to collect²³. Data are available from a variety of sources, but datasets presenting comparable data series across countries and over time are still relatively young. Such data can only be collected in the first instance via household surveys and education facility accounting systems, which are not necessarily conducted or analysed routinely in all countries. Moreover comparisons of data across countries, and within countries across time, can be problematic for a variety of reasons. Where there is data, it is not always disaggregated between different types of cost (direct and indirect) in the same way, or by level of education. While WRI used uniform methods to process national survey data based on well-established methodologies created by the World Bank, individual survey quality varies widely and even similar surveys may not be strictly comparable. Significant differences in the design of questionnaires make it impossible to fully harmonise aggregation procedures. For example, household consumption measurements can vary widely depending on the distinct categorization of consumer goods identified. In addition, comparisons of countries with different levels of development can be problematic due to variations in the relative importance of expenditure and income from the production and consumption of non-market goods. The local market value of all consumption (including consumption from own production, particularly important in underdeveloped rural economies) should be included in the measure of total consumption expenditure. While most survey data now include valuations for consumption of income from own production, valuation methods vary²⁴.

71 The ways in which public and private financing is intertwined also complicates the matter (for instance where governments provide partial funding to private institutions, or education conditional cash transfers etc.). In many countries it is recognised that on aggregate the greater share of household education expenditure goes towards secondary and tertiary education, due to the high cost of these in comparison to primary which is often ostensibly free. However, it is also recognised that spending on primary education remains significant for many households in a variety of different contexts, and that the share of total

²³ Private expenditures are extremely difficult to report in the absence of special household expenditure surveys, which are costly to design and implement (GMR 2003/04, p99).

²⁴ EarthTrends (<http://earthtrends.wri.org>) Searchable Database Results; Economics, Business, and the Environment -- Base of the Pyramid: Share of total household expenditure, education; Technical notes. The reliability of these data can also be open to question as it is often difficult for households to value consumption items where there are not always established markets for those items. Examples include food gathered from the bush, blood (consumed as a foodstuff), firearms (where it is not possible to ask about firearms at all but where they often comprise a significant share of assets and consumption expenditure), livestock (where some communities consider it taboo to answer questions on numbers and values of livestock owned), etc.

household education expenditure commanded by different levels of education varies across different demographic and income groups. In countries with historically low levels of secondary and post secondary education, and in countries with rapid population growth, the opposite is more likely to be true due to more households having more young children and the education system not growing fast enough to catch up with the growing number of primary-school-leavers. In short, the cost of accessing education, even in countries where primary schooling is ostensibly free, remains in many instances a real barrier to the achievement of UPE and other EFA goals.

Datasets

72 Currently there is no definitive global repository for these data, nor yet a universally recognised or standardised set of indicators. Several of the main global datasets do present some data on private education expenditure, but not always for the same indicators and data is often very sparse across countries and years. Some analyses refer to total private spending as proportion of GDP, others to private spending as a proportion of public education spending defined in different ways (total public education expenditure; recurrent public expenditure etc.). At the household level, universal measures outside of household expenditure on education as a proportion of total household expenditure are not uniform either, as household spending is not always or similarly disaggregated by level of education, or split between different types of costs (direct and indirect).

73 Of the main global education datasets:

- UIS online database presents data on total expenditure on educational institutions and administration as a % GDP from private sources, disaggregated by level (all levels, pre-primary, primary, secondary and post-secondary non-tertiary, and tertiary). Data is very sparse both across countries and over years.
- WB EDStat presents an education data repository from country household surveys, including DHS, MICS, and LSMS. The latter contains data on household education expenditure disaggregated by level (primary, secondary and post-secondary). LSMS disaggregates between various types of household education expenditure, and gives proportion of education in total household expenditure. Only 14 of 80 countries have LSMS surveys, and not all of these for multiple years. EDStats tables 1.1-1.3 and 2.1-2.3 present data drawn from a variety of sources (including OECD and UIS databases, as well as individual household surveys) for between 61 and 63 countries respectively on two indicators: Private education expenditures as % of GDP; and Private education expenditures as % of total education expenditures. This data is disaggregated between three categories: All levels of education; Primary and secondary; and Tertiary. The tables do not present data on private household education expenditure on Primary education alone. Close to half of the countries presenting data in these tables are OECD countries (29 of the 30 OECD countries are present, the exception being Luxembourg).
- OECD presents expenditure data for OECD countries on all entities that provide funds for education, classified as either governmental (public) sources or non-governmental (private) sources, the sole exception being "international agencies and other foreign sources", which are treated as a separate category. There are three types of financial transactions: Direct expenditure on educational institutions; Transfers to students or households and to other private entities; and Households' expenditure on education outside educational institutions. Direct private expenditure data are disaggregated according to the type of service provider to which, or for which, the payments are made - that is, public institutions, government-dependent private institutions, and independent private institutions.
- World Resource Institute Earth trends presents Percent (%) of total household expenditure among those earning less than USD 3,000 annually for 33 countries,

compiled from household surveys taking place between 1998 and 2005 and originally published in *Next Four Billion: Market Size & Business Strategy at the Base of the Pyramid* (Washington, D.C.: WRI, March 2007).

- EPDC country profiles, which are constructed using household survey data, do not report household education expenditure.

74 Under these conditions of the effective absence of any definitive global repository or standardised set of indicators for household education expenditure, we are left with a more or less disparate collection of not necessarily comparable household survey data, collected at differing times around the world with irregular frequency. The UNESCO Institute for Statistics Global Education Digest includes statistical appendices on Private expenditure on educational institutions and educational administration as a % GDP, disaggregated by level, but acknowledges that ‘a lack of data limits the information on private funding even though it is an important factor’ (UIS 2009, p49). The GMRs report in detail on the private provision of education services – proportion of private enrolments etc., structure of the private sector in education service provision – but only sporadically on private education expenditure: most GMRs include at least a brief discussion in the main text, but none present tables in the statistical appendices with data on private education expenditure and the figures and indicators quoted in the main text in support of the discussion are drawn from disparate sources²⁵.

Private provision of education services

75 Private participation in education has grown markedly in the last 20 years. Globally, enrolment in private primary schools grew by 58% between 1990 and 2004, while the same figure for public primary schools was only 10%. There are around 113 million students in non-government schools; of which 62 million are at the primary level (p3, Patrinos et al 2009)²⁶. Governments remain the main financiers of primary (and secondary) education, but an increasing variety of forms of private participation (PPPs) in the delivery of education services proliferate. Public-Private Partnerships can take the shape of publically funded contracts to provide services such as the construction and maintenance of education infrastructure, provision of teacher training, provision of support services like school meals, design of national curricula, as well as the management and operation of public education institutions themselves. Still other forms of contract require private agents to provide education to specific student groups by means of subsidies and vouchers. The most common type of PPP is where the government provides subsidies to private institutions to fund student places.

²⁵ For instance, GMR 2005 reports that “The share of private expenditure in primary and secondary education has been estimated at 42% in Jamaica, 33% in the Philippines, 30% in Chile, 24% in Indonesia and 21% in Colombia, to take but a few examples (UNESCO Institute for Statistics/OECD, 2003).” Whereas GMR 2002 reports on private household expenditures per pupil relative to the level of public recurrent expenditures per pupil for 6 African LDCs (plus Ghana) use a combination of household survey data and secondary reporting.

²⁶ GMR 2003/4 shows global-level data as missing for 1990, but in 2004 presents private enrolment in primary education as a percentage of total enrolment as 7.3% at the global level (Table 11, GMR 2003/4, p382). GMR 2009 states that between 1999 and 2006 private enrolment in primary education as a percentage of total enrolment has remained static at 7% (Table 5, GMR 2009, p306).

Education financing by private households

76 While there is a vigorous debate as to the benefits and detriments of PPPs in education, another important factor within the education system of any country, even where free public primary education is ostensibly universal, is the amount of education expenditure borne by private households. Such expenditure can take the form of formal or informal user-fees, exam charges, transport and school clothing costs, cost of school meals, facility maintenance etc., as well as the opportunity costs of sending children to school who might otherwise be employed in productive economic activity. These costs are often intertwined in complex ways with public spending on education, making them difficult to disentangle, but can often place a significant burden on households, especially the poorest, and act as real barriers to the achievement of UPE even in countries where primary education is nominally free.

77 Numerous studies estimate the ratio of private household to public education expenditure to be significantly high in many countries. The GMR 2008 reports on 11 countries participating in the joint UIS-OECD World Education Indicators (WEI) programme, as well as 28 OECD countries, and finds that household payments of school-related charges in nine of the 11 countries represent more than one-quarter of total expenditure on education. Table 2.2 in the World Bank ED STATS²⁷ also reports Private Education Expenditures as a Percentage of Total Education Expenditures on primary and secondary education for a selection of countries, and shows that for those developing countries with data, this share can be highly significant: in Kenya in 1991 (the only year with data) the share is recorded at 38%; Indonesia records proportions of around 23-24% between 1999 and 2002; while Zambia shows a share of 80% in 1990. A DFID study (DFID, 1998) analysing Ghanaian household survey data from 1987 to 1992 found that household direct and indirect expenditures on primary education amounted to the equivalent of about 30% of government expenditures. A study in Vietnam (Patrinis & Glewwe 1999), using data from the Vietnam Living Standards Survey 1992-93, found that despite primary education being nominally free, and primary enrolment in private schools under 2%, private finance amounted to over 50% of total primary education financing. The country case studies conducted as part of this evaluation also produced significant insights in this regard. In Burkina Faso, for example, it was stated that household spending on education was estimated at approximately 33% of the total recurrent education expenditure (public + private) in 2006; the figure for primary only was 23%.

Conclusion

78 Notwithstanding the complications and problems associated with the construction and comparability of these data, such findings do demonstrate that private finance constitutes a significant element of overall education finance in many countries. As the GMR 2005 points out, a different picture would emerge to the one presented by public expenditure alone if data on private expenditure on education were available. Countries have different mixes of public and private schooling, and a shift of emphasis from what governments invest in education to what societies invest is needed to take this into account (GMR 2005, p117).

79 While it is not the remit of FTI to directly address private household expenditure on education, the issue does indirectly pertain to the FTI agenda on UPE. FTI's efforts to aid countries to achieve UPE (and perhaps other EFA goals) are necessarily affected by the issues of actual household education expenditure as a barrier to access, and private provision in education as structural feature of the education sector. Country efforts to account for these issues and tackle the various problems associated with them should thus

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<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTEDUCATION/EXTDATASTATISTICS/EXTEDSTAT/S/0,,contentMDK:21217413~menuPK:4324086~pagePK:64168445~piPK:64168309~theSitePK:3232764,00.html> [accessed 30/09/09].

be appropriately reflected in education sector plans and in this way enter into the consideration of FTI. As it stands, the IF indicator on private provision (Private share of enrolments % of pupils enrolled in exclusively privately-financed primary schools) is seriously inadequate to capture what is going on in an increasingly complicated and privatised world²⁸.

²⁸ See [Annex C](#) for a discussion of the FTI IF.

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