MillenniumProject

Commissioned by the UN Secretary General and supported by the UN Development Group

Task Force 3 Interim Report on Primary Education

February 4, 2004

Coordinators
Nancy Birdsall
Amina J. Ibrahim
Geeta Rao Gupta

Comments are welcome and should be directed to:

Ruth Levine at rlevine@cgdev.org

Note to the reader

This Interim Report is a preliminary output of the Millennium Project Task Force on Education and Gender Equality. The recommendations presented herein are preliminary and circulated for public discussion. Comments are welcome and should be sent to the e-mail address indicated above. The Task Force will be revising the contents of this document in preparation of its Final Task Force report, due December 2004. The Final Task Force report will feed into the Millennium Project's Final Synthesis Report, due to the Secretary-General by June 30, 2005

Disclaimer

This publication does not necessarily reflect the views of the United Nations Development Programme (UNDP), its Executive Board or its Member States.

MillenniumProject

Commissioned by the UN Secretary General and supported by the UN Development Group

The Millennium Project is the independent advisory body to United Nations Secretary-General Kofi Annan that is commissioned with recommending, by June 2005, operational strategies for meeting the Millennium Development Goals (MDGs). This includes reviewing current innovative practices, prioritizing policy reforms, identifying frameworks for policy implementation, and evaluating financing options. The Project's ultimate objective is to help ensure that all developing countries meet the MDGs.

As a United Nations-sponsored initiative, the Millennium Project proceeds under the overall guidance of the Secretary-General and United Nations Development Programme (UNDP) Administrator Mark Malloch Brown in his capacity as chair of the United Nations Development Group (UNDG). Professor Jeffrey Sachs directs the Project, which brings together the expertise of world-class scholars in both developed and developing countries, United Nations agencies, and public, non-governmental, and private-sector institutions. Ten Task Forces carry out the bulk of the Millennium Project's analytical work with support from a small secretariat based at UNDP headquarters in New York. The Task Forces and their Coordinators are listed below.

Task Force	Task Force Coordinators
1 - Poverty and Economic Development	• Mari Pangestu • Jeffrey Sachs
2 - Hunger	• Pedro Sanchez • M.S. Swaminathan
3 - Education and Gender Equality	• Nancy Birdsall • Amina Ibrahim • Geeta Rao Gupta
4 - Child Health and Maternal Health	• Mushtaque Chowdhury • Allan Rosenfield
5 - HIV/AIDS, Malaria, TB, Other Major Diseases and Access to Essential Medicines	• Agnes Binagwaho • Jaap Broekmans • Paula Munderi • Josh Ruxin • Burton Singer
6 - Environmental Sustainability	• Yolanda Kakabadse Navarro • Don Melnick
7 - Water and Sanitation	• Roberto Lenton • Albert Wright
8 - Improving the Lives of Slum Dwellers	• Pietro Garau • Elliott Sclar
9 - Open, Rule-Based Trading Systems	• Patrick Messerlin • Ernesto Zedillo
10 - Science, Technology and Innovation	• Calestous Juma • Lee Yee Cheong

Additional information on the Millennium Project is available on its website at
www.unmillenniumproject.org

United National Millennium Project
Task Force on Education and Gender Equality

Interim Report on Achieving the Millennium Development Goal of Universal Primary Education

[Draft: 1 February 2004]

Contents

I. Introduction
- Purpose and organization of the paper

II. The Task Force Contribution

III. The MDGs and the History of Goal-Setting in Education

IV. Trends toward Universal Primary Education and Gender Parity in Education at the Primary Level
- Primary school enrolment
- Gender parity in primary school enrolment
- Primary school completion
- Gender parity in primary school completion
- Differentials within countries
  - School differentials by household income
  - Urban/rural gaps and differentials by ethno-linguistic groups

V. Messages of the Task Force
- Message 1. Mothers matter most. Sustained progress toward universal primary education requires actions to improve the status of girls and women.
- Message 2. A little schooling isn't enough. The benefits of education endure only after a critical level of schooling has been attained, so providing educational opportunities for adolescents – and particularly adolescent girls – is essential.
  - Literacy
  - Labor market returns
  - Fertility and mortality
  - Physical integrity
  - HIV/AIDS
- Message 3. Parents, and other citizens, have the right to know. Improving local, national and international accountability through better data and monitoring is fundamental to better education.
  - Parents and school administrators
  - National planners and political representatives
  - International technical agencies and donors

Message 4. More money, better spent. Significant Additional Resources Are Critical, But Not Sufficient, to Reach Universal Basic Education.
- Various cost estimates
- Common findings about costs
- Money is not enough
- Beyond spending: Education system reform
  - Political commitment and leadership
  - Administrative continuity and capacity
  - Teachers' unions
  - Community involvement, local autonomy
- An effort to link more money to better policy: The Fast-Track Initiative
- Donor reactions to the FTI and prospects for additional support
  - FTI strengths
  - Progress on-the-ground
  - FTI's weakness: Lack of visible and high-level commitment to inspire broad action toward the 2015 goal
- Redefining the role of business and the private sector in basic education

Message 5. Focus on the hardest-to-reach. Reaching out-of-school children will take special efforts, beyond what is typically thought of as "scaling up."
- Direct and Opportunity Costs
  - Interventions
  - Eliminating School fees
  - Conditional transfers
  - School feeding
  - School health programs
  - Especially for girls
  - Children in conflict and post-conflict societies

Message 6. Think holistically. For education to reach its potential to contribute to economic growth, it needs to be accompanied by sound, broad-based economic reform.
- Education and economic growth
- A good economy increases the demand for education
- Education and women's empowerment

VI. What the Donors Should Do

VII. A Call to Action

References Cited

Annex 1. Success Stories in Policy Interventions towards High Quality Universal Primary Education

Annex 2. Data Issues

Annex 3. Major Initiatives and Actors in Primary Education and Girls' Education

Boxes, and Tables and Figures

	Title	Page
Boxes		
Box 1	Task Force Messages	3
Box 2	Importance of Adolescents	17
Box 3	Quality in Education	26
Box 4	Challenges of Costing	29
Box 5	Trends in ODA for Education	32
Box 6	Cuban Education System: Good Performance under Severe Resource Constraints	36
Box 7	Community Participation: The Key to Increasing Effectiveness, Transparency, and Accountability	38
Box 8	Special Section on HIV/AIDS	61
Tables		
Table 1	Development Goals for Universal Primary Education	6
Table 2	Development Goals for Gender Parity in Education	7
Table 3	Primary Completion by Region and Gender (Population weighted averages)	10
Table 4	Total Fertility Rate and Desired Family Size by Years of Schooling, Across World Regions	19
Table 5	Estimated Annual Financing Gap to Achieve the Education MDG, by Region	31
Table 6	Countries Considered for FTI Funding	40
Table 7	Primary Education Provision in Post-Conflict Settings, Asia and Latin America examples	53-55
Table 8	Coefficient of Years of Schooling: Mean Rate of Return Based (based on Mincer-Becker-Chiswick)	56-57
Table 9	Strategic Priorities Linked to Messages	63
Figures		
Figure 1	Public Spending on Education in Developing Regions	8
Figure 2	Development Assistance for Education Through Time (ODA to education, all bilateral donors, as percent of developing countries' aggregate GDP)	9
Figures 3 and 4	Attached separately	
Figure 5	The Timeline and Outcomes Disconnect	45

INTERIM REPORT
FOR COMMENT
(February 4, 2004)

Millennium Project
Task Force on Education and Gender Equality

Interim Report on
Achieving the Millennium Development Goal of
Universal Primary Education[1]

[1] This draft report was prepared by Anne-Marie Smith (consultant), Maria Beatriz Orlando (Center for Global Development) and Ruth Levine (Center for Global Development). It incorporates significant passages from Task Force background papers by Gene Sperling, Mary Joy Pigozzi, Julie Kennedy and colleagues, and Simon Ellis, as noted. The report has been reviewed by the Task Force members, and we have made our best efforts to incorporate the changes suggested. However, discussion about several key issues continues within the Task Force (as indicated in the text), and thus this should not be taken as representing a consensus view. Over the next several months, we will be consulting more widely, and will refine the contents of this report. Please address comments to Ruth Levine, rlevine@cgdev.org.

I. INTRODUCTION

How can the international community reach the global goal of universal primary education and gender parity in education? This question is the focus of two of the Millennium Development Goals endorsed by world leaders at the UN Millennium Summit in 2000 – and of this report.

The Millennium Project Task Force on Education and Gender Equality, an expert advisory group commissioned by the UN Secretary General, has been assigned to take a systematic look at the means to achieve dramatic improvements in education in the developing world. The Task Force, one of 10 under the auspices of the Millennium Project, is charged with developing recommendations for UN agencies, and the international community more generally, about how to achieve the MDGs. The Task Force has defined its main audience as international agencies; a secondary audience is policy makers in developing countries who may find it useful to consider how the actions recommended can be adapted to their circumstances. The Task Force's work, consisting of limited new research, a review of existing analytic work, deliberations and consultations, will be conducted from July 2003 – June 2005, with a final version of this report due in December 2004.

Purpose and organization of the paper. This interim report, a main product of the Task Force's deliberations, is not in any way intended to be the "final word" of the Task Force, but rather seeks to be a vehicle through which the Task Force can convey its current thinking about priorities – and particularly priority actions to be taken by donor countries and key technical agencies. It is also the way in which the Task Force highlights the range of views within the group. The Task Force expects to use the interim report for the purposes of broad consultation with civil society representatives, other experts, decision makers in international agencies, and others between February and July 2004. The results of the consultations will then inform the final report of the Task Force.

This interim report covers issues related to the goal of universal primary education, which encompasses the goal of gender parity at the primary level. The Task Force's other interim report, on gender equality, covers issues related to gender parity at higher levels of education, as well as a broader conceptualization of gender equality.

The paper is organized as follows: The first several sections set the context for the Task Force messages and recommendations: an articulation of the overall perspective of the Task Force, a brief history of goal-setting in international education, and evidence about progress toward achievement of the goals. Then, we set out six major messages of the Task Force. Each of the messages is substantiated by a review of selected literature. The messages imply a set of recommendations about strategic priorities for the developing countries, for donors, and for the international community's overall architecture in support of the education MDG. The implied recommendations for developing countries we hope will be treated as a menu. Circumstances, institutions and needs vary

considerably among countries, and ownership and leadership requires developing and implementing local solutions. For the donors as a group and for the international community, we are more explicit. We propose, in preliminary form, four recommendations. Annex 1 includes an inventory of interventions in primary education that are considered to be successful. Annex 2 includes additional details about education indicators and data collection. Annex 3 provides a summary of the major international and/or regional agencies and organizations working in the area of primary education and girls' education.

II. THE TASK FORCE CONTRIBUTION

The Task Force recognizes that many public and private organizations have made, and continue to make, major contributions to both our understanding of the shortcomings of education systems in the developing world, and actions to improve the situation. Analysts and advocates alike shine bright lights on the problems of access to schools, the quality of instruction, sex-stereotyping in curriculum, safety, health and nutrition problems that effectively limit children's ability to learn, and other issues. Literally dozens of reports have been generated on topics ranging from the quality of education data, to trends in gender parity, to the effectiveness of school feeding programs. The Task Force seeks to benefit from all of those efforts, and duplicate none of them.

Instead, the Task Force sees this report as a review of knowledge around specific messages that members believe must be considered and adopted by

Box 1
Task Force Messages

1. **Mothers matter most**. Sustained progress toward universal primary education requires actions to improve the status of girls and women.

2. **A little education isn't enough.** Because the benefits of education endure only after a critical level of schooling has been attained, providing educational opportunities for adolescents – and particularly adolescent girls – is essential.

3. **Parents, and other citizens, have the right to know.** Improving local, national and international accountability through better information generation and sharing is fundamental to better education.

4. **More money, better spent.** Significant Additional Resources Are Critical, But Not Sufficient, to Reach Universal Basic Education

5. **Focus on the hard-to-reach.** Reaching out-of-school children will take special efforts, beyond what is typically thought of as "scaling up."

6. **Think holistically.** For education to reach its potential to contribute to economic growth, it needs to be accompanied by sound, broad-based economic reform.

international agencies if they are to contribute in optimal ways to accelerating progress toward universal primary education and gender parity. Each of these messages underlies one or more specific actions that the Task Force recommends.[2]

Task Force perspective: Transformation vs. evolution.[3] Throughout its deliberations, the Task Force recognized that both the inputs to and the outputs from education are extraordinarily complex, although at times that complexity is absent from international discourse. Typically, the inputs to education are described in technical terms (e.g., the optimal pupil:teacher ratio, the availability of textbooks and chalk); outputs are often described in economic terms (e.g., the higher incomes associated with each additional year of education). But because education is, first and foremost, the vehicle through which societies reproduce themselves, both the inputs and the outputs in an education system may more rightly be thought of as a set of ideas about how a given society is structured and should be structured in the future.

Decisions affecting both *what* is taught and *who* is taught are part of the process of social reproduction. With respect to *what* is taught, the leading figures within one generation transmit to the next generation their understanding of history and the essential skills, knowledge and beliefs for the perpetuation of the society. With respect to *who* is taught, policies and practices related to resource allocation, placement of schools, the scope for private sector involvement, and overt or invisible barriers to access lead to outcomes that generally reinforce social stratification.

Explicitly recognizing the social reproduction objective of education helps to explain the painfully slow progress toward universalization of education and gender parity, and the troubled history of many of the reform efforts that have been undertaken to increase and democratize access to educational opportunities. It suggests that actions that are fundamentally *evolutionary* – that is, actions that seek to "make bigger" the existing system – are unlikely to succeed, particularly in societies characterized by profound economic, gender and ethnic inequality. Rather, success depends on actions that are fundamentally *transformational* – using specific levers to induce fundamental changes toward a more democratic and egalitarian future.

III. THE MDGS AND THE HISTORY OF GOAL-SETTING IN EDUCATION

The Millennium Development Goals (MDGs) were ratified by the leaders of the UN's 189 member nations at the September 2000 Millennium Summit, and since then have gained some purchase in guiding public policy priorities. The Goals, which are based on analytic work and consultation that started in the mid-1990s, are intended to be a shared statement of global aspirations for improvements in human welfare, tied to concrete

[2] In the final report, these messages can be taken as the consensus view of Task Force members. In this interim report, no such sweeping statement can be made, as noted in specific parts of the text.
[3] We are indebted to Lant Pritchett for contributing to thinking on this perspective.

indicators to be achieved by 2015 or earlier.

Education plays a prominent role in the MDGs. Goal 2 – "achieve universal primary education" – has the following target: "Ensure that by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling." Goal 3 – "achieve gender equality" – focuses squarely on gender parity in education at all levels, with ambitious targets for both 2005 and 2015.

The goals related to education were closely linked to the Education for All Framework established at the Dakar World Education Forum, which received a high degree of agreement among major international actors, including the donor community, education specialists, and technical agencies of the UN. That Framework, however, includes six goals that implied efforts in early childhood education, primary and secondary basic education, non-formal education, adult literacy and a range of other education-related initiatives.[4] The education MDG, in contrast, is formulated to focus exclusively on primary education in the formal sector.

The MDGs (and EFA) follow a long tradition of far-reaching, high-level goals generated through the UN agencies and other international bodies. Since World War II, every 10 years or so an international body has identified as a goal the achievement of universal primary education across all countries in the world. The timeframe set for the goal has typically been 20 years hence. A similar series of goals have been set for gender parity in primary (and higher) levels of education[5] (see Tables 1 and 2).

[4] The "Education for All" Framework established in Dakar seeks the following goals: expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children; ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities complete, have free and compulsory primary education of good quality; ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programs; achieving a 50 percent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for adults; eliminating gender disparities in primary and secondary education by 2005 and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality; and improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

[5] Clemens, 2004

Table 1. Development goals for universal primary education		
Target year	**Approved**	**Forum**
—	1934	International Conference on Public Education, Geneva
	1948	UN Universal Declaration of Human Rights, New York
	1951	International Conference on Public Education, Geneva
	1952-54	UNESCO Regional Conferences on Free and Compulsory Education; Bombay, Cairo, and Lima
1980	1960	UNESCO Meeting of Representatives of Asian Member States on Primary and Compulsory Education, Karachi ("Karachi Plan")
	1961	UNESCO Conference of African States on the Development of Education in Africa, Addis Ababa ("Addis Ababa Plan")
	1962	UNESCO Conference of Ministers of Education and those Responsible for Economic Planning, Santiago ("Santiago Plan")
	1966	UNESCO Conference of Ministers of Education and Ministers Responsible for Economic Planning in the Arab States, Tripoli
	1970	International Development Strategy for the Second UN Development Decade, New York
2000	1979	UNESCO Conference of Ministers of Education and Those Responsible for Economic Planning of Member States in Latin America and the Caribbean, Mexico City
	1980	International Development Strategy for the Third UN Development Decade, New York
	1990	UNICEF World Summit for children
	1990	World Conference on Education for All, Jomtien ("Jomtien Declaration")
	1993	Education for All Summit of Nine High-Population Countries, Delhi ("Delhi Declaration")
2015	1995	Fourth World Conference on Women, Beijing ("Beijing Declaration and Platform for Action")
	1996	*Shaping the 21st Century*, OECD Development Assistance Committee
	2000	World Education Forum, Dakar ("Dakar Declaration")
	2000	Millennium Summit, New York ("Millennium Declaration")
	2001	*Road map towards the implementation of the United Nations Millennium Declaration*
	2002	UNICEF The Special Session on Children
	2002	UNICEF Convention on the Rights of the Child
Source: Multiple sources, cited in Clemens, 2004		

Table 2. Development goals for gender parity in education		
Target year	**Approved**	**Forum**
—	1960	UNESCO Convention against Discrimination in Education
	1967	UN Declaration on the Elimination of Discrimination against Women
	1981	UN Convention on the Elimination of All Forms of Discrimination against Women
1980	1975	World Plan of Action for the Implementation of the Objectives of the International Women's Year, Mexico City
1995	1980	Programme of Action for the Second Half of the United Nations Decade for Women, Copenhagen
2000	1985	Nairobi Forward-Looking Strategies for the Advancement of Women Towards 2000
	1993	UNESCO and UNICEF Pan-African Conference on the Education of Girls ("Ouagadougou Declaration")
2005	1995	Fourth World Conference on Women, Beijing ("Beijing Declaration and Platform for Action")
	1996	Shaping the 21st Century, OECD Development Assistance Committee
	2000	World Education Forum, Dakar ("Dakar Declaration")
2015	2000	Millennium Summit, New York ("Millennium Declaration")
	2001	Road map towards the implementation of the United Nations Millennium Declaration
Source: Multiple sources, cited in Clemens, 2004		

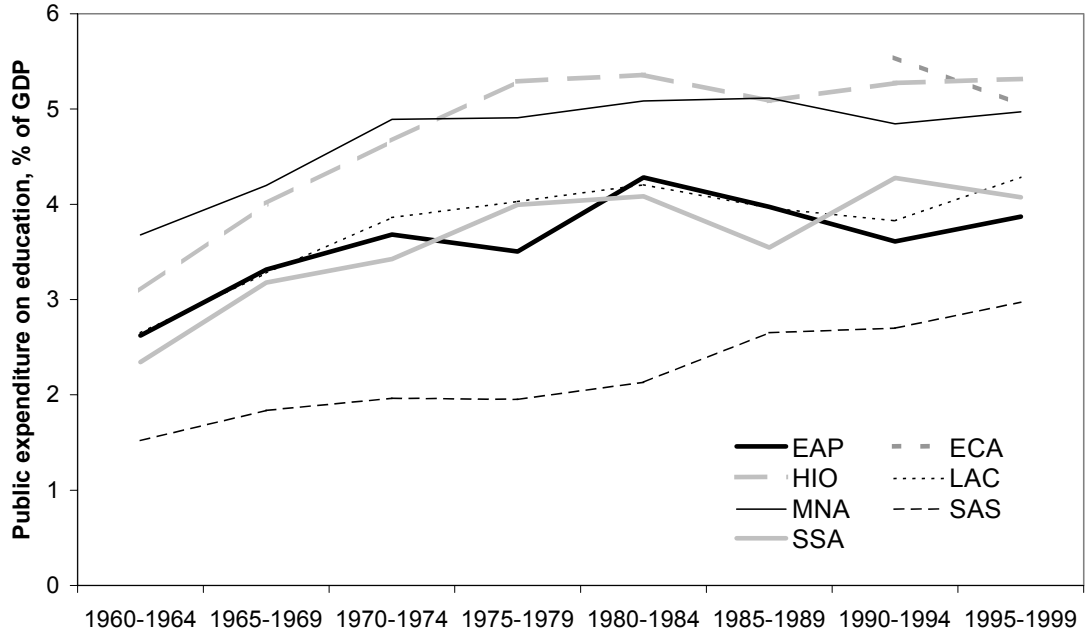
With respect to outcomes, the impact of goal-setting over the sweep of history is difficult to detect. Trends in the volume of public spending, development assistance and in enrolments – all of which follow a long-term, general upward trajectory – have not been visibly affected by these international statements (see Figures 1 and 2) (Clemens, 2004).

We can speculate about the reasons for the modest impact of goal-setting on outcomes. Historically, much of the goal-setting has been characterized by an imperfect link between the political, or rhetorical, level and the technical level: The feasibility of the goals were not established before the language was adopted, and they manifested an oversimplification of complex social phenomena. The indicators chosen arguably were not the best measures of the concepts of interest; many observers believe there has been an overemphasis on increasing enrolments, without corresponding attention to retention and completion ("survival" through the end of a school cycle) – or, more importantly, to learning outcomes. In addition, as global goals that represented a uniform vision of where countries should be headed, they have obscured the tremendous heterogeneity across countries and regions. For example, while most of the goals that today seem unreachable without a major improvement in current trends by many of the poorest

African countries (at least in the given timeframe), they have already been surpassed in many instances in Latin America (at least at the national level). Importantly, the goal-setting in education has tended to focus almost exclusively on expansion of access, particularly through increasing the number of schools and teachers; demand-side constraints of various kinds have generally been ignored. Finally, it is an uncomfortable truth that agreement by world leaders in a global forum does not guarantee their commitment on home territory, either in rich or poor countries. International goals reflect priorities that may not withstand competing pressures among domestic constituencies.

The goal-setting has had a purpose, however. Each of the goal-setting moments has been accompanied by several actions – in most cases the creation of special programs and greater visibility within the donor community, aimed at expanding access to schools and, at times, improving school quality. It is widely thought that international goal-setting is important in mobilizing and monitoring political commitment and leadership at the international level. If done effectively, it can help nations, regions and districts plan around clear targets and measure progress, and be held accountable for their commitments. In the most recent instance, the EFA goal-setting was accompanied by the creation of the Fast-Track Initiative designed to mobilize supplementary external funding for national education plans, and the preparation of annual EFA Monitoring Report.

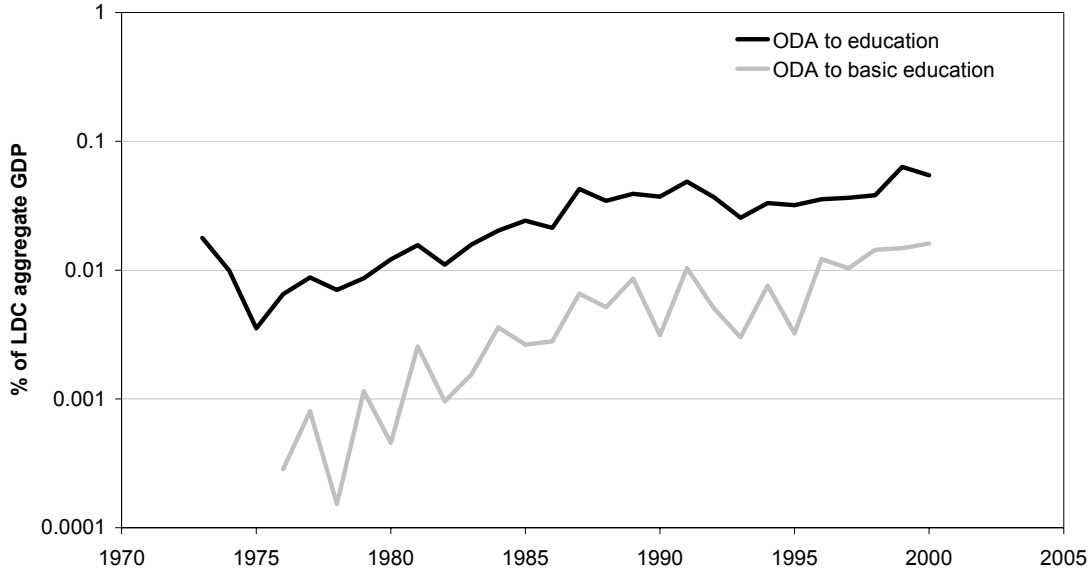
Figure 1. Public spending on education in developing regions[6]



Source: *World Development Indicators 2002*, in Clemens 2004

[6] "Public expenditures" includes public subsidies to private education

Figure 2. Development assistance for education through time (ODA to education, all **bilateral** donors, as percent of developing countries' aggregate GDP)



Source: OECD Creditor Reporting Service, in Clemens, 2004

Observations from the historical record about both the benefits and the impact of goal-setting suggests a conclusion that is relevant to the MDGs: International agencies, and the governments of developing countries that suffer from poor education sector performance should seize this important moment to fulfill commitments to education made earlier, as well as make meaningful new commitments. However, if the MDGs are used simply to introduce relatively small programs that make the existing school systems bigger, it is extremely likely that the international community will be setting the same (unmet) goals in 2015 as it set in 2000 (and in 1990 and in 1980). Dramatic and change-creating actions, based on new thinking about the expansion of educational opportunities, are likely to be the only means to induce measurable progress to universal primary education and gender equality.

IV. TRENDS TOWARD UNIVERSAL PRIMARY EDUCATION AND GENDER PARITY IN EDUCATION AT THE PRIMARY LEVEL

Recent history may be an imperfect guide to the future, but it is instructive to look at trends in primary school completion and gender parity across the regions of the world, highlighting the greatest challenges.

Primary school "completion"[7] An (imperfect) indicator of the success of the education system is primary school completion (to 5 or 6 years).[8] The most current average rate of completion in the developing world is 81percent (see Table 3), which is significantly behind the goal of universal completion. In Sub-Saharan Africa only a little bit more than half of all school-aged children complete primary school. In the 1990s, many countries, across all regions, registered important improvements in completion.

World and regional averages obscure the sharp differences in completion among countries during the 1990s. Brazil, Nicaragua, Cambodia, and the Gambia registered increases on the primary school completion rate of up to 20 percentage points. On the other hand, other countries showed stagnant or declining completion rates (Afghanistan, Zambia, Republic of Congo, Albania, Cameroon, Kenya, Madagascar, Qatar, Iraq, United Arab Emirates, Bahrain, and Venezuela.[9]

Table 3. Primary completion by region and gender (Population weighted averages)

	1990			2000*		
Region	**Girls**	**Boys**	**Total**	**Girls**	**Boys**	**Total**
Africa	43	57	50	46	56	51
East Asia and Pacific	92	97	96	98	98	97
Europe and Central Asia	85	95	90	93	95	93
Latin America and Caribbean	71	64	69	85	81	83
Middle East and North Africa	71	84	78	78	86	83
South Asia	59	77	68	63	84	74
All Developing Countries	65	79	73	76	85	81
Source: Bruns, Mingat, and Rakotomalala, 2003, based on World Bank database on primary school completion						
* for some countries the last available year is 1999						

Gender parity in primary school completion. Primary school completion has improved substantially in the 1990s around the world for girls (see Table 3). However, currently only 76 percent of girls complete primary school compared to 85 percent of boys. In most regions of the world rates of completion are lower for girls than for boys, especially in Africa. In Latin America, we observe an overall "reverse gender disparity," with girls registering higher primary school completion.

Some countries have severe gender disparities in primary completion, which have been assuaged only by declines of boys' completion in the 1990s. Other countries have

[7] Primary completion rates used in this section are those provided by the World Bank. The operational definition of primary completion is the total number of students successfully completing the last year of primary school divided by the total number of children of "graduating age" in a given year.
[8] In some cases, completion is measured as true "survival" to the end of a school cycle; in other cases, completion is measured as a proxy – enrollment in the final grade of the cycle. In all cases, measures of completion do not claim to measure learning outcomes, and thus fall short of the mark as indicators of true education system performance.
[9] Bruns, Mingat, and Rakotomalala, 2003

improved gender parity in completion through a variety of policy instruments (Tunisia, Bangladesh, and Sri Lanka). There are also examples of local programs that have increased girls' enrolment and completion (e.g., Balochistan Province in Pakistan) (see Annex 1 Successful Interventions)).

Gender concerns go far beyond the quantitative indicators of enrolment and completion, however. A wide body of research and practice highlights the lack of gender sensitivity in school curriculum, and gender-biased classroom interactions, in which boys' participation is favored over girls'. Elimination of these differentials, which are invisible in statistics, is also inherent to the achievement of gender parity in education.

Differentials within countries. Although the education and gender parity Millennium Development Goals fail to include an explicit distributional (or equity) dimension, achieving universal primary education requires that progress in access and completion disproportionately benefit poor and otherwise disadvantaged children. They are the ones out of school, or leaving school before they reach fifth or sixth grade. They are also the ones for whom educational quality is the lowest, and support systems at home the weakest.

Many developing countries have sharp education inequalities across income and ethnic groups. Educational inequalities also arise from geographic and language barriers. Education inequality includes lack of access for specific groups, quality disparity, and inequality of opportunities, which affects completion.

School differentials by household income. In every country, completion rates are lowest for children from poor households. Moreover, the education income gap exacerbates gender disparities. Girls from poor households register very low levels of completion in many countries.[10]

Filmer and Pritchett (1998) and Filmer (2000) find evidence of differentials on school enrolment and attainment by income levels using household survey data from the Demographic and Health Surveys in 35 developing countries. The authors find the following patterns:

- The difference in school completion by income levels can be relatively small in some countries and extremely large in other countries (up to a difference in 9 years between median school years).

- Among countries with lowest overall averages in enrolment and completion (Western/Central Africa and South Asia), the poor register very low enrolment in the first grade. In these cases, bringing education for all is an exercise in social inclusion and expanding the education system.

[10] Bruns, Mingat, and Rakotomalala, 2003

- Among countries with high overall education attainment averages, the poor reach nearly universal enrolment on the first grade. However, poor children drop out of school after one or two years of schooling in some cases. Thus, these countries register significantly lower levels of completion than enrolment (most Latin American countries). In these cases, education quality and household demand incentives are key to universal primary education.

- Education differentials by income exacerbate gender disparity, especially in Africa.

Urban/rural gaps and differentials by ethno-linguistic groups. In many countries the rural/urban education gap is the most important factor explaining education differentials. In Benin, the average completion rate is 39 percent, while in the rural areas is only 27 percent. In Mozambique, average completion is 26 percent and rural completion is only 12 percent. The same pattern exists in Niger, Burkina Faso, Guinea, Madagascar, and Togo.[11]

Girls in rural areas register even lower levels of completion, especially in Africa. Rural girls in Niger, Burkina Faso, Guinea, Benin, Mozambique, and Madagascar register rates of primary school completion that are lower than 15 percent.

Race and ethnicity differences are correlated to school achievement differentials, within countries, in Latin America and the Caribbean. Menezes (2003) summarizes the evidence on education exclusion for some ethnic communities. In Mexico, the school enrolment rates for indigenous groups are 20 percent below the national average, even after decades of multilingual and multicultural public education programs. In Ecuador and Brazil, completion rates are higher for white children than for children of black or indigenous descent. In Guatemala and Peru, indigenous groups are native speakers of ancestral languages, which delays primary school enrollment. Language barriers are also correlated to poor school achievement when the traditional curriculum in Spanish is used.

Ethnic school exclusion exacerbates gender disparities. In Peru, 65 percent of indigenous females are illiterate while only 26 percent of the non-indigenous females are illiterate.

Ethno-linguistic diversity creates serious challenges in Pakistan, Ethiopia, and Bangladesh.[12] In Balochistan Province (Pakistan), four languages are spoken in addition to the national language (Urdu). Language barriers had a significant impact on education access, especially for girls in rural areas where local languages predominate. By the end of the 1980s, literacy rates for women in Balochistan's rural areas were only between 1 and 2 percent. The Balochistan province education reform, included locally developed

[11] ibid
[12] See Annex 1

curriculums and textbooks in the native languages with the cooperation of local professionals and international experts.[13]

Future prospects. While there is not consensus on the number of children who currently are out of school (world agencies estimates vary between 104 primary school age children out of school worldwide to 121 million)[14], there is consensus in the prediction of the failure to meet the gender parity goal by 2005. However, there is more controversy surrounding progression toward the goals, and how many countries will reach them in 2015.

Bruns, Mingat, and Rakotomalala (2003) explain that some countries have experienced increases up to 20 percentage points in completion during the last decade. This progress provides hope that all countries that have at least 70 percent completion could potentially reach the MDG goal by 2015. The authors add that, on the other hand, many countries have had stagnant or worsening completion rates during the 1990s, including middle-income countries. Therefore, progress towards the MDGs on education and gender cannot be taken for granted, especially if the actual goal is primary school completion, rather than the lower bar of enrollment.

Figures 3 and 4 show that unless the current education progression trends change significantly, the goals of universal primary education and gender parity in education will not be met in the developing world. Prospects vary by starting point, of course. Latin America and the Caribbean and Eastern Europe and Central Asia will be extremely close to the goals if the current trend continues. Sub-Saharan Africa, South Asia, and Middle East and North Africa will be at least 10 percentage points away from universal primary education.

Figures 3 and 4 are in a separate file

Making the trend toward universal primary education steeper over the next 12 years than it has been over the past 20 in the developing world will be a very tall order indeed. An historical analysis of trends in enrolment from 1865 to the present shows both that there is a remarkably consistent pattern of transition from low to high enrolment (and from low to high gender parity), and that the transition in education coverage in many developing countries has been much faster than the historic transition exhibited by most developed nations.[15]

So that is the context and the challenges: Wide diversity across countries in region in current performance of their education systems, with the bleakest picture by far appearing in Sub-Saharan Africa and South Asia – two regions that are also characterized by particularly low levels of girls' participation in school. And an upward-bound trend in

[13] See Anzar (1999).
[14] UNICEF, 2004.
[15] Clemens, 2003

enrolments that, while steeper by far than what the rich countries achieved during their transition to universal primary schooling, is still not fast enough to achieve the MDGs by 2015. Together, this suggests the need for dramatic and highly strategic approaches to the major education challenges in the poorest countries.

V. MESSAGES OF THE TASK FORCE

The world suffers from shortages of many kinds, but it is blessed with an abundance of written work on the problems of primary education in developing countries. With recent large-scale analytic efforts by the World Bank, UNESCO, and other agencies, combined with broad and deep academic research on the topic of education in poor countries, much knowledge is readily available.

From this body of knowledge, and from practical experiences in the rough and tumble of policy making and program development, the Task Force is developing six messages that underpin the group's recommendations. Each of these messages is intended to address a dimension of the transformative solutions that will be needed to deal with the persistent problems of education in poor countries.

[In the final report, we anticipate highlighting specific interventions or actions associated with each of the Task Force messages.]

Message 1: Mothers matter most. Sustained progress toward universal primary education requires actions to improve the status of girls and women.

Education of girls and mothers leads to sustained increases in education attainment within a society from one generation to the next, and has the unique ability to enable a transformation from a situation in which having children out of school is socially acceptable to one in which the expectation is that every child completes a course of schooling. A wealth of cross-country and individual country studies from Africa, Asia and Latin America over the past 25 years reveals the same pattern: mothers' education is a strong and consistent determinant of their children's school enrolment and attainment. Multiple studies find that a mother's level of education has a strong positive effect on their daughters' enrolment – more than on sons and significantly more than the effect of fathers' education on daughters. Studies from Ghana, Egypt, Kenya, Peru, Malaysia, India and Mexico all find that mothers with a basic education are substantially more likely to educate their children, and especially their daughters, even controlling for other influences.[16]

[16] Lavy, 1996; Ridker 1997; King and Bellew, 1991; Lillard and Willis 1994; Alderman and King, 1998; Kambhapati and Pal, 2001, Parker and Pederzini, 2000; Bhalla et al, 2003.

Further, the more educated a mother is, the better. A study by the Inter-American Development Bank (IDB) finds that in Latin America 15-year old children whose mothers have some secondary schooling will remain in school for two to three more years than the children of mothers with less than four years of education.[17]

In "The Structure of Social Disparities in Education: Gender and Wealth," Filmer (1999) investigates the correlates of educational enrolment and attainment gaps within countries. Using 57 internationally comparable household datasets from 41 countries, Filmer examines the effects of gender, household wealth, the education of adult household members, and the presence of schools in the community on the educational outcomes of children. Filmer finds that the education of adults in the household has a significant impact on the enrolment of children in all the countries studied. The effect of mother's education is larger than that of fathers in some, but not all, of the countries studied. Among the countries where the marginal effect of maternal education is significant, it ranges from under one to six percentage point increase in the probability of enrollment. Filmer's analysis supports the view that women's education has a stronger impact than that of men in stopping the cycle of low education outcomes.[18]

What is the causal relationship between maternal education and children's enrollment? Several mechanisms are suggested. First, education is related to an adult's long-term earning capacity and to women's bargaining position for resources within the family. Therefore, an educated mother may have the resources to send a child to school. Second, mothers who are more educated may play a more effective pedagogical role, encouraging, monitoring or assisting their children in doing homework or preparing for examinations. A third possibility is that educated mothers serve as role models for their children. If children, particularly girls, see that their mothers attended and valued schooling, they may aim to follow that example. Several studies have sought to isolate these different causal mechanisms.

Research in Latin America suggests that the pedagogical model does not apply there, in a context in which many women are in the workforce. According to the IDB's *Facing Up to Inequality in Latin America*, "Were this a pedagogical story, mothers who do not participate in the labor market would be expected to have more time to improve their children's schooling. However, children of working mothers actually attain higher educational levels than those of mothers who do not work." After controlling for a variety of factors, the study finds that mother's participation in the labor force increases a child's likelihood of being enrolled in school. In 13 of the 15 Latin American countries for which data was available, this positive effect of a mother's participation in the labor market on a child's educational enrolment is positive and statistically significant. On

[17] Inter-American Development Bank, 1998, p. 74.
[18] Filmer, 1999.

average, if a mother participates in the labor market, the probability of her child being enrolled in school increases by around 5 percent.[19]

Is there still a positive and significant impact on children's education in contexts where educated women do not participate in the labor market? Research in India confirms that this is so. Behrman et al examine the relationship between maternal education and children's schooling in a region of India with very low participation of women in the formal-sector labor market. Their findings underscore the potential pedagogical effect of maternal education. Despite the absence of market returns to female schooling, their study reveals a rapid increase in demand for schooled wives in areas of high agricultural growth. They interpret this as derived demand for female schooling as an input in the production of child schooling. Returns to women's schooling are to be found in the household sector, where it increases "the efficiency of maternal time in the production of child human capital." They find, for example, that the children of literate women study two hours more a day than the children of illiterate women. Increased investment in female schooling thus has social payoffs even where there are not substantial labor market opportunities for the women themselves. Behrman et al conclude, "An important implication of our results is that increasing labor market opportunities for women is not necessary to justify increased investments in female schooling, which have payoffs even in settings in which there is increased demand solely in male-dominated occupations" [20]

[Over the next several months, the Task Force will consult internally and externally on the priority that should be given to adult literacy for women. Although adult literacy programs have many merits, there is a dearth of evidence about whether literacy acquired later in life has a similar effect on future generations as does early education of girls.]

Message 2. A little schooling isn't enough. The benefits of education endure only after a critical level of schooling has been attained, so providing educational opportunities for adolescents – and particularly adolescent girls – is essential.

Given its current quality and orientation, schooling does not produce enduring benefits until a minimum threshold is reached. The location of that threshold varies by context—not only degree of gender stratification, but also such factors as level of development and rural/urban setting. In general, more education will be required to secure returns in settings that are more gender stratified or more impoverished. The threshold also varies depending on the outcome being measured: literacy, labor market returns, fertility, violence against women, and HIV/AIDS risk.

[19] Inter-American Development Bank, 1998, p. 74.
[20] Behrman et al, 1999, p. 712.

While the Millennium Development Goal to which world leaders have subscribed focuses on primary education, it is likely that this is insufficiently ambitious to generate the hoped-for benefits. The approach of "basic education," which may be up to nine years of schooling (depending on local definitions of a cycle of basic education), is likely to be an aspiration that is more consistent with the long-term goal of prosperity and greater human welfare in today's developing countries (the developed countries of tomorrow). This is particularly true given the size of the adolescent population, and the risks faced by teenagers (see Box 2). The evidence presented here focuses attention on the crucial role of continuing education past the primary level to gain and secure returns in many different areas.

Box 2. The Importance of Adolescents

Nearly half of all people now living are under the age of 25. Adolescents account for half a billion people—the largest generation of adolescents in history. The United Nations terms this a "demographic window," offering a unique opportunity: "With appropriate investments in health and education and conducive economic policies and governance, countries can mobilize their young people's potential, and launch an economic and social transformation."[1]

Adolescents need to reach their physical, emotional and intellectual potential before transitioning to the adult responsibilities of marriage, childbearing, householding, and employment. Education can have a substantial impact on the timing and the quality of all of those transitions.

The risks that children and adolescents face are daunting. Premature and ill-prepared entrance into the labor market will lower employment prospects over a lifetime for men and women. Early marriage and childbearing will result in grave health risks for women and their children. The next generation then remains vulnerable to an intergenerational transmission of poverty, with low school enrolment and poor health indicators.

To these generic risks are added the further specific risks of our time. AIDS is vastly increasing the number of orphans. In ten Sub Saharan African countries, more than fifteen percent of children under the age of fifteen have been orphaned. In the 1990s, armed conflicts killed nearly a million children. In 2000, an estimated 300,000 child soldiers were involved in thirty conflicts around the world. Estimates of the number of women and children trafficked each year into the sex trade and labor enslavement vary widely, from 700,000 to four million.[1]

How will young people navigate past these risks? The world needs to make great strides in healthcare, conflict resolution, and human rights. Of particular importance for adolescents is access to reproductive health services, protection from the forms of violence and abuse to which they are especially vulnerable, and targeted training and labor market preparation. Education is crucial. Curricula need to be relevant and to open alternatives and opportunities for adolescents. School facilities need to provide safe environments for all students, girls as well as boys. And educational systems have to find ways to maintain retention into the crucial period of adolescence, a key threshold for many different outcomes.

Interestingly, parents seem to intuit what the data displays. Research shows that when a community also has a secondary school nearby, parents are more willing to let children start primary school because they want them to move to the secondary level where they believe the benefits really lie.[21]

[In the sections that follow, much of the

[21] Herz, et al. 1995, p. 40.

evidence refers to an association between a desired outcome (e.g., literacy) and a level of education, rather than proof of causation. However, taken as a whole, the work cited strongly suggests that, under the current conditions of primary schooling in the developing world, completing only primary education has limited potential to provide individuals with the basis for improved life chances.]

Literacy. A growing body of research suggests that completion of at least five to six years of schooling is a critical threshold for sustainable mastery of basic competencies. Permanent literacy and basic numeracy cannot generally be achieved on any less. The UNESCO Institute for Statistics finds that 10 percent of children are literate after three years of education, 70 percent reach literacy after six years, but 100 percent attain literacy with a full ten years of basic education.[22] Longer matriculation is also associated with greater retention of literacy skills. Importantly, literacy skills also are retained only if individuals are in an environment in which these skills are required and reinforced over a lifetime.

Labor market returns. Psacharopoulos and Patrinos, 2002, review the latest estimates and patterns in the literature on returns to investment in education. They report that, overall, women receive higher returns to their schooling investments (10 percent) than men receive (9 percent). Returns vary, however, by level of schooling. The returns to primary education are much higher for men (20 percent) than for women (13 percent). Women, on the other hand, experience higher returns to secondary education (18 percent) than do men (14 percent).[23]

Fertility and mortality. Female secondary education is a critical component of lowering fertility and mortality. Subbarao and Rainey conducted a cross-country study examining fertility and secondary school attainment among women in 65 low and middle-income countries in 1985, collectively including 93 percent of the population of the developing world. In countries where few women had a secondary education, family size averaged more than five children, of whom one to two died in infancy. But in countries where half the girls were educated at the secondary level, the fertility rate fell to just over three children and child deaths were rare. Subbarao and Rainey calculate that in these 65 countries, doubling the proportion of girls educated at the secondary level form 19 percent to 38 percent in 1985, holding constant all other variables (including access to family planning and health care), would have cut the fertility rate from 5.3 to 3.9 and the infant mortality rate from 81 to 38. In percentage terms, it would have reduced births by 29 percent and infant deaths by 64 percent compared to the actual in 1985.[24]

Other multi-country studies confirm that girls who drop out of school and marry in their early teens typically begin childbearing before their bodies are mature and continue with

[22] Ellis, 2003, p. 43.
[23] Psacharopoulos and Patrinos, 2002.
[24] Subbarao and Rainey, 1995.

closely spaced births. The result is high mortality, among children as well as mothers. Evidence also consistently shows that women with no or less than primary schooling tend to have earlier ages at marriage or first birth and higher subsequent fertility than those who have completed primary schooling.[25]

Another study summarizing sample surveys across the developing world compares female education and fertility by region. The higher the level of female education, the lower desired family size, and the greater the success in achieving desired family size. Further, each additional year of a mother's schooling cuts the expected infant mortality rate by 5 to 10 percent (see Table 4).[26]

Table 4. Total fertility rate and desired family size by years of schooling, across world regions

Years of Schooling	Total Fertility Rate	Desired Family Size
Africa (8 countries)		
0	7.0	6.9
1-3	7.2	6.4
4-6	6.2	5.9
7 or more	5.0	5.0
Latin America (13 countries)		
0	6.8	4.8
1-3	6.2	4.7
4-6	4.8	4.2
7 or more	3.2	3.7
Asia and Oceania (13 countries)		
0	7.0	5.4
1-3	6.4	4.3
4-6	5.8	4.2
7 or more	3.9	4.0
Source: Schultz, 1993		

Physical integrity. Female education can play a critical part in reducing violence against girls and women and enhancing their control over their own bodies. As the evidence on female genital mutilation (FGM) makes clear, secondary education may once again provide an important threshold.

Profiles of nine African countries found that FGM was more prevalent among uneducated women. Women with primary or no education are more likely to have been cut than those who have received secondary level instruction. In the Central African Republic, for example, 48 percent of women with no education and 45 percent with primary education have been cut, while only 23 percent of women with secondary education have been

[25] Herz and Measham, 1987; Ainsworth et al 1996.
[26] Schultz, 1993.

subjected to the practice.[27] Another study by the World Health Organization in 1998 reports that in the Ivory Coast, 55 percent of uneducated women had been cut, compared with 24 percent of women with a primary or higher level of education.[28]

Women's education also affects their attitude toward the genital mutilation of their daughters. A study in Kenya found that women who had some secondary education were four times more likely to oppose FGM both in general and for their daughters and granddaughters as were women who had never completed primary school.[29] In Burkina Faso, the WHO study found that educated women were 40 percent less likely to have their daughters subjected to FGM. The study found that while 78 percent of girls whose mothers had not graduated from primary school had been cut, only 48 percent of girls whose mothers had received some secondary educated allowed their daughters to be cut.[30]

HIV/AIDS. The HIV infection rate in many developing countries is growing fastest among teenage girls. Education for girls may be a critical to breaking that pattern, by increasing their understanding of risks and their capacity to avoid them. As Herz and Sperling argue,

> Girls who attend school are far more likely to understand the risks involved in risky behavior, not believe the myths associated with sex, and (in the case of good school programs) even know effective refusal tactics in difficult sexual situations. Equally as important, education helps girls gain the economic clout and the standing in society to avoid high-risk behaviors and save their own lives. While education is not a fool-proof solution to sexual violence and the transmission of HIV/AIDS, it is widely seen as the most fundamental contributor to giving women more voice and standing in their families and communities.[31]

A 32-country study found that women with post-primary education are five times more likely than illiterate women to know facts about HIV/AIDS. For example, illiterate women are three times more likely to think that a healthy-looking person cannot be HIV positive and four times more likely to believe that there is no way to avoid AIDS.[32] Another study found that rural Ugandans with secondary education are seven times less likely to contract HIV. Over the course of the 1990s, people who finished secondary

[27] Population Reference Bureau, 2001.
[28] WHO, 1998.
[29] Demographic and Health Survey—Egypt, 1995.
[30] WHO, 1998.
[31] Herz and Sperling, 2003, p. 20.
[32] Vandemoortle and Delmonica, 2000.

education were seven times less likely to contract HIV—and those who finished primary education half as likely—as those who received little or no schooling.[33]

[While no Task Force members disagree in concept with the value of higher levels of education, there is not yet consensus about the practical implications. There is concern that advocating for investments in post-primary education will create an unaffordable burden on both donor and domestic resources, and will result in an inequitable allocation of resources, as the more privileged groups in society will be more likely to take advantage of greater access to higher educational levels.]

Message 3. Parents, and other citizens, have the right to know. Improving local, national and international accountability through better data and monitoring is fundamental to better education.

Transforming education requires that, at all levels, stakeholders know what is working and what is not. To make the right decisions about whether to send children to school, and what to ask of their local and national leaders, parents and guardians, to know key facts about the performance of their local schools. To formulate sound policies and projects, planners need to have data that indicate the true scope of the problem and that measure the impact of interventions. At the international level, accurate, relevant, timely and comparable data is central for mobilizing support, informing planning and monitoring progress toward the MDGs. However, it is important to note that attaining this crucial data presents many challenges due to differences in administrative and survey methodologies of differing world agencies yielding different data on enrolment and attendance.

This is not simply a standard plea for more data and better data systems, although these are part of the solutions. But they are solutions only within the context of a broad conceptualization of who has the right and need to information about school and education system performance. As *Education for Action 2002* observes,

> [I]f the development of policy and planning is conceived as a purely technical process, it is unlikely to serve poor and disadvantaged people well. Unless the process of policy development, planning and program delivery are part of a wider engagement with people and their representatives, education that is inclusive and meaningful will be unlikely to materialize. This is not to deny the pivotal role of government, nor of the need for well-trained and committed planners, it is rather to recognize that a credible plan will reflect the outcomes of ongoing dialogue and participation designed to provide qualitative as well as quantitative information and understandings.[34]

[33] De Walque, 2002.
[34] *Education for Action 2002,* p. 127.

Parents and school administrators. At the local level, parents and school administrators need information about the effectiveness of their local schools. Simple indicators of relative performance—spending per child, preparation of teachers, educational outcomes compared with other schools—are essential. Such information is generally unavailable to parents, particularly parents who are most likely to be faced with failing primary schools.

Examples from the varied contexts of Brazil and Uganda illustrate the point. In 2001, the Education Secretariat of the State of Parana in Brazil introduced the Boletim da Escola, an annual school report card of the performance of each of the primary and secondary schools under its jurisdiction. The report cards seek to increase accountability of the schools and government to the community. The cards help the community, the government, and the school adopt a shared vision of universal primary education. Other objectives of the report cards are: empower parents to participate in the education process and inform decision making at all levels. The report card covers:

- Student achievement (from statewide standard tests);
- Student flow (promotion, retention, and drop out rates from national statistics);
- School characteristics;
- Students' impressions and socio-economic background (questionnaires);
- Principals' style (statements);
- Parents' opinions (parent survey).

During 2002, about 1.3 million report cards had been disseminated to parents and community members through several means, stirring significant interest. Teachers, parents, and administrators have already used the cards as the primary information source for implementing solutions and monitoring progress. [35]

In Uganda, a 1991-1995 survey revealed that only 20 percent of central government funding destined for local schools was actually reaching them. In response, the central government launched an information campaign. Each month, it provided data on training transfer grants to school districts. This information was published in newspapers and broadcast on the radio. Equipped with such information, local communities were able to monitor the flow of federal funds precisely and effectively. By 2001, fully 80 percent of federal funds was reaching schools. Although many other changes were occurring in Uganda during the same period, so the impact of the transparency in information *per se* is impossible to isolate, schools with access to newspapers increased their funding on average by 12 percentage points more than schools with no access to newspapers.[36]

[Additional material to be added here about the relationship between greater access to information, accountability at all levels, and greater parental "voice" in the education system.]

[35] Vasconcelos Saliba, 2003; also see www.pr.gov.br/cie/boletim
[36] Reinikka and Svensson, 2003

[Additional material to be added here about the link between quality (and quality measurement) and sustained demand for education on the part of parents.]

[Not all Task Force members are convinced that transparency of information and greater parental involvement in the teaching-learning and school management process are essential for good education system performance.]

National planners and political representatives. At the national level, data are required for planning for the education sector as a whole and how it fits into macroeconomic policies. Good data and program evaluations are also essential for designing and assessing the cost-effectiveness and impact of a range of investments and interventions. While nations have varying degrees of centralization in their education sectors, all require sound data at the national level for their sector-wide plans.

The experience of UNESCO's UIS, the lead agency for internationally comparable education statistics, has highlighted many problems with the quality of education data, which reflect underlying weaknesses in national information systems. The problems include:

- The inability of some countries to provide any data at all – fully 30 percent cannot provide basic education data
- Incomplete data over time
- Incomplete data within a country – with data relating to particular areas such as private education, or to particular parts of the population such as migrant groups, particularly difficult to obtain
- Inconsistencies of data within a country – especially where the data have been supplied by different ministries, a particular problem being mismatches between population data used in the education ministry, those supplied by the national statistical agency and those distributed by the UN Population Division which is the lead UN agency for population data

As UNESCO has highlighted difficulties in collecting quality education data within countries, UNICEF in the "State of the World's Children report 2004", does also, and further describes specific differences in methodologies in collecting data between countries leading to international agencies having different data. Specifically, since "UNICEF uses enrolment data for most countries and survey data where enrolment data is either not available or is older than the survey data,"[37] UNICEF's statistics are higher than that of other international agencies, estimating, for example, that between that 121 million children are out of school, of which 65 million (54%) are girls.[38] UNICEF explains that "Using different methods—enrolment and attendance—helps get us closer

[37] UNICEF, 2004
[38] Ibid, 2004

to the real number of children who might be denied their right to an education, and so in need of intervention."[39]

From the national perspective, an acute problem for planners is the lack of information within administrative sources about the characteristics (except for location of residence) of the in-school and out-of-school children. To address this problem, household survey data are a valuable complement to administrative data. Data on household spending on education, for example, can be particularly significant in interpreting the impact of government spending on educational outcomes.

The major advantages of household survey data are that they cover several areas that administrative data do not, in particular:

- The characteristics and home circumstances of children who do not attend school
- A rich coverage of "home" factors that influence attendance at school
- More complete coverage of informal and private schooling (including early childhood education), which may not be included in administrative sources

On the other hand there are also some problems associated with such surveys: They take place only once every three years; they do not have global coverage; and they generally are financed and operated on behalf of donor agencies and may not be integrated into national government policy.

An increasing number of surveys collecting data on education participation have been conducted in developing countries. Co-ordination efforts have been undertaken to try to harmonize some of the key variables, so as to generate an international database of comparable education indicators. The number of developing countries covered by USAID's Demographic and Health Surveys, UNICEF Multiple Indicator Cluster Surveys, and the World Bank's Living Standards Measurement Surveys is large and growing.

[In the final report, we will add short section on shortcomings of evaluation work to date, and surprising "things we don't know" (for instance the lack of information on cost-effectiveness and the focus of evaluations on enrolment vs. learning outcomes).]

International technical agencies and donors. At the international level, monitoring of progress toward achievement of the MDGs is a necessary part of optimal allocation of donor resources, and contributes to efforts to assess effectiveness of policy and programmatic changes. Good data will also help with coordination among partners. While poor performance in the education sector may not retard international rhetorical support, it certainly prejudices aid flows.

[39] Ibid, 2004

UIS has documented multiple problems that complicate efforts to compare progress across countries or over time, including:

- Inadequate implementation of the international standards and classifications leading to data which are not comparable across countries
- Changes in the use of international classifications which lead to inconsistent data over time
- Poor or incomplete metadata and, in particular, the absence of information on quality of the data
- An over-reliance on data from administrative sources and the lack of other data with which to validate information
- Long time lags before data are processed and available

Statistics for gross enrolment in primary grades are fairly complete for Africa and response rates have improved significantly. When considered by overall coverage by country the greatest problem areas for enrolment data are the small islands of the Caribbean and the Pacific. Whereas the majority of countries could produce data for teacher pupil ratios, since they do not involve either specific age or grade information, only about one quarter of the Pacific countries could provide data. Improved vital statistics would have the most impact here. Although enrolment data are available for just over 30 percent of Caribbean countries 81 percent provided a teacher/pupil ratio, reflecting more difficulties in obtaining population figures for small islands. In Africa the collection of data is interrupted by changes in staff, and by broader economic or social crises. Although the response rates remain relatively constant, the particular countries which respond changes from year to year.

Reliable, accessible data is also required from donors if planning for education at the national level is to be sound. The UN Joint Inspection Unit has remarked on the difficulty of obtaining "a single set of comparable and accurate data on the level and amount of assistance provided to primary, basic education by the various actors, bilateral, multilateral, regional and financial institutions in 2002." Methods for attributing aid to basic education are not clear and consistent (is teacher training, for example, to be counted as support to tertiary education or primary education?). Funds pledged for new initiatives may be transferred from existing assistance, rather than representing actual increases in aid.[40]

Box 3. Quality in Education

Quality in education is not a simple concept. It includes the fundamentals: delivering a knowledge base and a set of usable skills to impart effective literacy and numeracy. But there is much more to it. Cognitive development is essential, incorporating the encouragement of higher-order critical and reflective thinking and problem-solving. Appropriate curriculum, including life skills and learning to live together are also paramount, encompassing education on rights, health, nutrition, gender equality, HIV/AIDS, peaceful negotiation, conflict resolution, and respect for and acceptance of diversity. The learning environment is a core component to delivering quality in education. The health and safety of all learners should be protected and promoted, through such measures as feeding programs, health screening, adequate sanitation facilities, and prevention of bullying and harassment. The teaching process, including respect for all learners, is also key to achieving quality in education.

Quality in education enables students both to reach their individual potentials and to participate fully in – and perhaps transform -- the societies they live in. Quality in education is impossible without ensuring access, yet access to education without quality is meaningless.

Following are examples of education reforms with a significant impact on quality, and specific interventions with a significant impact on quality:

Education reforms in Chile during the 1990s had the objectives of improving quality and reducing inequities. Within the overall reforms, several interventions had a significant impact on quality: school evaluation and rewards system, elimination of double shifts to increase the number of hours and activities in the school day, and improvements on teachers' salaries and job conditions. Another example of education reform towards higher quality and equity is India's District Primary Education Program (1995-1999). Districts participating in the program registered improvements in standard language and mathematics tests.

Teacher training has a direct impact on education quality and should be an ongoing process. Botswana's Primary Education Improvement Project, the Basic Education Teacher Diploma in Namibia, and the Rajasthan Training Program (India) involve teachers directly in the design and delivery of their ongoing training. An innovative approach in teacher training is Guinea's grant program for teachers who want to pursue training and research activities. In Brazil, distance education using television is a great tool to keep teachers updated.

*Source*s: Pigozzi (2003) , Annex A, Delannoy (2000), World Bank (1999), Craig, Kraft, and Du Plessis (1998)

[40] Bertrand, 2003, p. 10.

Message 4. More money, better spent. Significant Additional Resources Are Critical, But Not Sufficient, to Reach Universal Basic Education

There is little doubt in anyone's mind that achieving universal primary education, encompassing gender equity at the primary level, will cost much more than is currently being spent, either by developing country governments or by the international aid community. While estimates vary (as outlined below), the external financing requirements for poor countries are likely to be somewhere between $2-6 billion per year. Moreover, if this Task Force's message about the importance of post-primary education is appropriated, then the price tag will be even larger.

There is also little doubt that money is not the sole solution to the problem of low enrolments, gender differentials, low completion rates and poor quality. Myriad studies have demonstrated that additional financial resources are likely to make some education systems function better, giving children closer schools, more and better prepared teachers, and needed supplies. But additional financial resources alone are unlikely to rescue failing systems from the traps of poor governance and management, lack of connection to parents and labor market needs, and other factors that keep schools from performing well. (See Box 3 for a discussion of education quality.)

The "bottom line," then, is likely to be a combination of significant new resources, both from national governments and, in the case of poor countries, from rich countries through bilateral and multilateral aid mechanisms, *and* changes in how the money is used. Because of the weak evaluation work to date, an essential part of this approach will be monitoring the impact of reforms and targeted interventions, and making mid-course corrections if and when they are proving to be less than successful.

Various cost estimates. Recent studies for achieving universal primary enrolment by UNICEF, UNESCO, Oxfam International and the World Bank have estimated that it would require between US$7 billion and US$15 billion per year to put every child in a good quality primary school. Several have dealt in detail with some of the many methodological challenges inherent to such an exercise (see Box 4).

The lowest and earliest estimate was done by UNICEF in 2001.[41] It explicitly sought to estimate the global *minimum* cost for achieving the goal. In that study, analysts:

- Calculated costs at the country level and then aggregated them
- Assumed a linear trend in student enrolment toward the 100 percent goal
- Used country-specific unit costs
- Estimated unit costs in 34 (out of 128) countries with levels from similar countries
- Assumed costs remain constant in real terms

[41] Delamonica, Mehrotra, and Vandemoortele 2001.

In 1998 dollars, they estimated annual costs of US$9.1 billion between 2000 and 2015 to reach universal primary enrollment. This comprised US$6.9 billion per year of additional recurrent spending and another US$2.2 billion per year for quality improvements and capital investments. They point out that this additional funding could be achieved with 0.14 percent of the developing countries combined GNP, or by increasing their current primary education expenditures by 11 percent.

Another study calculated global requirements for universal primary education within the context of meeting all the MDGs.[42] It provided four different estimates as follows:

- An estimate based on a single average cost of US$110.60 per student multiplied by the number of primary school-age children not in school, coming to US$11.4 billion.
- An estimate based on using regional median costs per student for each country, yielding US$14.9 billion per year.
- An estimate using country-specific average costs per student for each country of US$10.4 billion. This is closest to the US$9.1 billion per year estimated by the UNICEF study that also used country-specific average costs.
- An estimate using 13 percent of GDP per capita as the cost per student to reflect the funding required to assure good quality schooling, which yields an estimate of US$28 billion per year.

The most detailed study to date, by Bruns, Mingat, and Rakotomalala (2003), extends these findings in several ways. It also estimates costs from country-specific data (in this case 47 countries that account for more than 90 percent of the primary school age children who are not in school). It focuses on the share of each school-age cohort that *completes* primary schooling. It simulates the flow of students into and through primary school, including estimates of repetition rates. And it addresses the impact of HIV/AIDS on education, including the need for more teachers to replace those who have died or are absent, and support for AIDS orphans to assure they can attend school. The most sensitive parameters in this model are average teacher salaries, pupil-teacher ratios, share of the recurrent education budget not spent on salaries, and the repetition rate.

[42] Devarajan, Miller, and Swanson, 2002.

- Average teacher salaries are assumed to rise immediately in half the countries to 3.5 times GDP per capita while they decline gradually to this level in those with higher pay. They assume it is politically easier to raise wages than to lower them.
- Pupil-teacher ratios are assumed to adjust gradually to 40:1.
- Recurrent spending on non-salary inputs adjust to 33 percent, a rate which is significantly higher than currently found in most countries, but which would be necessary to assure quality.
- Repetition rates are assumed to gradually fall to 10 percent, a rate found in well-performing developing countries.

The study calculates the costs for the 47 low-income countries for which they have detailed data and that represent more than 90 percent of the school-age children in low-income countries who are not in school. The resulting annual requirements are US$16.6 billion, of which

Box 4. Challenges of Costing

Initial estimates of the costs of universal primary education were very rough, simply using average costs per pupil and number of children out of school. Such calculations underestimate the cost of achieving universal primary education because they focus on enrolment rather than on completion, graduation or other endpoints more closely aligned with the goals of a well-functioning primary education system and which require quality improvements as well as simple extension to more students. The calculations are also subject to errors caused by assuming that marginal costs of expansion will equal current average costs, costs per pupil are the same across countries, or costs per pupil are constant over time.

These simple calculations also can be misleading because they focus on costs specific to the primary education sector and may neglect the costs of implementing policies in other areas that could have a substantial impact on reaching the goal of universal primary schooling. “They do not capture elements such as roads and other basic infrastructure or broader policy and institutional changes such as civil service reform that are necessary to improve sectoral performance and service delivery” (Report to Development Committee, Sept. 2003). They generally focus on the primary education sector alone, without taking into account the potential need for investments in secondary and post-secondary education both to increase the value of completing primary school and to increase the supply of candidates for primary school teachers. Finally, the costs of programs and policies aimed at reducing gender discrimination are not included, yet the magnitude of gender discrimination will affect enrollment, the supply of teachers, and the quality of benefits of schooling.

More recent estimates have improved on the initial efforts by addressing one or more of these issues. Most studies now aggregate total requirements from regional or country-level estimates and calculate annual spending based on the required flow of children into the school system. They also separately calculate recurrent and capital costs, and some incorporate changes in average costs and quality over time.

However, all of the studies are subject to the same limitations of data. Population data necessary to estimate the size of student cohorts is weak in the low-income countries of interest; student enrolment data is notoriously unreliable due to poor recordkeeping, repetition and poor attendance; and costs per pupil are confounded by inadequate information on budget expenditures, numbers of employed teachers, wage information, and private expenditures. Keeping these caveats in mind, the improvements in methodology have generated better estimates of the global requirements for achieving universal primary enrolment than were previously available.

US$15.1 billion are recurrent costs and another US$1.5 billion are capital costs. They estimate that domestic resources could be mobilized to cover US$14.3 billion of the annual costs, leaving a financing gap of US$2.3 billion.[43] Overall, this would mean that total spending on primary education by these countries from their own resources would rise from the current levels of US$8.5 billion to US$21 billion in 2015. The external financing gap would rise to US$4 billion in 2015 and begin to close thereafter.[44]

To estimate total requirements to reach universal primary enrollment, the study makes a simpler calculation using current unit costs and applying population and economic growth projections. It finds the incremental costs would be between US$23-28 billion, compared to spending by these countries of US$80 billion in 2000. The higher cost is due largely to higher unit costs – roughly six times higher than in the low-income countries in dollar terms. Such an estimate overstates the incremental cost since it does not address potential efficiency gains. The middle-income countries also have larger tax bases with which to finance the incremental costs. As a result, the projected gap that would require external funding is smaller than for the low-income countries, US$1-3 billion annually. Adding these figures to the low-income countries generates estimated incremental cost of US$33-38 billion per year of which US$5-7 billion would need to be financed with external assistance.

UNESCO reviewed these various costing exercises and argued that they underestimated costs and external aid requirements for several reasons. First, the World Bank estimates of domestic resource mobilization may be unrealistically high. Assumptions regarding future growth and revenues are optimistic and require spending on primary schooling to increase on average by 8 percent per year between 2000 and 2015. UNESCO also estimated that the impact of HIV/AIDS was not sufficiently accounted for, and thus added another US$10.4 billion in costs. These adjustments lead to external financing requirements on the order of US$5.6 billion, about twice the level estimated by the World Bank.[45]

[Although the required analytic work has not yet been done, it is likely that the messages of the Task Force, if they include post-primary education, would imply a higher price tag than any of the estimates reviewed above. The final report will have a total cost estimate.]

Common findings about costs. Beyond the global estimates, these studies have several common findings. First, all of the estimates suggest that recurrent costs, rather than capital investments, represent the bulk of required funds. About 55 percent of the external gap is for recurrent costs and only 45 percent for capital investments.[46] Policies

[43] Figures in the two preceding sentences are taken from Bruns et al 2003, Table 4.13. They appear to be contradicted by Table 4.15 that summarizes incremental costs for all low-income countries and states that the figure is US$8 billion for the 47 countries.
[44] Bruns et al 2003, p. 106-107.
[45] UNESCO 2002 "EFA Global Monitoring Report 2002
[46] Bruns et al 2003, p. 103.

regarding external assistance have to address the fact that they are, instead, largely focused on capital expenditures.[47]

Second, though the costs are large, they appear to be feasible for many countries relative to existing domestic spending on education and external aid levels. For example, the US$9.1 billion per year estimate from UNICEF is equivalent to a 1.1 percent annual increase in spending between 2000 and 2015. Bruns et al 2003, estimate that as a whole, even the low-income countries can cover more than 80 percent of the incremental costs for achieving the MDG target. UNESCO (2002) is more conservative in its evaluation of the capacity to mobilize domestic funding, but still recognizes that national resources will outweigh international assistance.

The estimates for external funding for primary schooling are some three times the current levels. In Sub-Saharan Africa this gap is largest. External aid commitments average near US$600,000 when the estimated requirements for the 33 Sub-Saharan countries in the study are US$1.9 billion. Although this appears large, it is still less than total development assistance to education (see Box 5). Only 20 percent of current external *education* spending goes to primary education. Thus, additional funding would be welcome, but shifting ODA priorities toward basic education could also fill this gap. *[This issue is not yet clear. Further analysis is required to determine whether the current levels of external funding at higher levels of education are required to ensure an adequate supply of teachers.]*

Third, differences between countries and regions are extremely large in terms of the affordability of reaching universal primary enrollment. Sub-Saharan Africa stands out as being the region in which external aid would have to play the largest role due to the limited capacity to mobilize domestic funds, requiring US$1.9 billion annually in external aid. South Asia's low-income countries have the second largest needs, of about US$400 million annually. The differences across countries demonstrate the importance of allocating external aid to countries where the gap is largest. In countries such as Tanzania and Ethiopia, reaching the MDG target requires doubling or tripling domestic primary spending even with large increases in external aid (see Table 5).

Table 5. Estimated annual financing gap to achieve the education MDG, by region

Type of financing	Africa	S. Asia	LAC	EAP	MENA	ECA	Total	Share of total financing gap
Recurrent	1,127	97	14	30	21	34	1,323	55
Operation	841	97	14	30	21	34	1,037	43
AIDS	286	0	0	0	0	0	286	12
Capital	725	300	34	6	49	0	1,114	45
Total	1,852	397	48	36	70	34	2,437	100

Source: Bruns et al, 2003; p. 108

[47] Report to Development Committee, Sept. 2003

Fourth, related to the previous point, efforts by middle-income countries to mobilize more resources or use them more efficiently in reaching the goal of universal primary enrolment could free up external aid for the lowest income countries that have the greatest needs.

Box 5. Trends in ODA for Education

International aid for education has risen steadily as a share of recipient countries aggregate GDP since the 1970s. Most of this increase is due to bilateral donors. Bilateral assistance for education has increased from less than .01 percent of aggregate GDP in recipient countries to almost 0.1 percent. By contrast, multilateral assistance as a share of recipient countries GDP stayed roughly the same. Relative to donor countries aggregate GDP, this funding fell somewhat in the 1990s. [1] Funding for basic education has remained at approximately 20 percent of total development assistance to education.[1]

At the World Bank, specifically, education lending has grown in relation to total lending. It now reaches 7 percent of total bank lending, compared with three percent in 1963-1969. Support for primary education has increased to 50 percent in 2002 compared with two percent in 1963-1969.[1]

Fifth, the range of estimates is heavily influenced by the quality of programs and policies. As discussed below, none of the goals will be met if new spending is not used appropriately. Efforts will be required to reduce repetition, allocate sufficient resources to complementary inputs, and maintain facilities. In half the low-income countries, teachers' salaries may need to be raised while in others the difficult prospect of lowering salaries may be required. Any of these policies can markedly affect the total costs of reaching universal primary enrollment.

Finally, the work on costing highlights that extreme difficulty of tracking and accounting for donor spending in education. Much of donor contributions are in non-monetary form (in-kind contributions, technical assistance, and so forth), and there is a large difference between the amount allocated in a foreign assistance budget and the amount that gets "to the ground level" for program inputs. To date, no system has been developed that provides adequate information to permit the international community to see whether spending by specific donors is or is not "filling the gap" between what is needed and what the national governments are able to provide.

Money is not enough. Increasing resources is clearly seen as a key strategy for achieving universal primary education; yet empirically the relationship between aggregate spending alone and outcomes in education—both access and performance – is unclear. While the World Bank study described earlier found patterns between spending levels (and other education system characteristics) and successful performance, other researchers have found weaker relationships, or none at all. Some countries that allocate lower than the regional average proportions of GNP to primary schooling achieve good education outcomes; in other countries, higher than average spending results in poorer outcomes.

For example, a review of 15 cross-country analyses relating resources to performance show no consistent relationships.[48] The relationships between such factors as pupil-teacher ratio, class size, teacher salary, spending per pupil or total spending as proportion of GDP to such outcomes as test scores, repetition rates, drop-out rates and enrolment ratios were sometimes positive, sometimes negative, sometimes significant, sometimes not.

Much of the work relating spending to outcome has been done on developed countries. Arguably, there may be a stronger link between resources and achievement in developing countries. Educational systems in developing countries tend to be so severely under-resourced that marginal increases in resources may have much larger impacts on educational outcomes than in developed countries. To investigate this possibility, Al-Samarrai constructed a new database covering all the world regions with many developing countries, including sub-Saharan Africa—and found much the same results. In both low and high income countries, the relationship between spending and outcomes in education is very weak.

Other than problems with the data (unlikely, since the results are in line with similar studies and with individual country studies), what explains this outcome? One possibility is the omission of household spending data. There may be a stronger relationship between total education expenditure (household combined with government) and educational outcomes than between government expenditure alone and educational outcomes. The proportion of total educational expenditure represented by household spending tends to vary considerably across countries. Some estimates are that four percent of household consumption is directed to schooling in low-income countries, compared to 6 percent in middle income countries and eight percent in industrial countries. There is wide variance for countries around those means. And for poor families in developing countries spending on schooling may reach twenty percent of household consumption.[49] In whatever setting, household spending may constitute a substantial proportion of the total spending on education. Therefore the weak link between public education expenditure and education outcomes may be partly due to variation in household education expenditure across countries.

The technical efficiency of education expenditure is another candidate for explaining the weak link. The effectiveness of public expenditure management systems deserves scrutiny, although there are no cross-country data available to measure it. The budgeting process and the relation between planning and budgeting may be key to understanding the relation between public expenditure and education outcomes. Shortfalls – due to a range of factors, including macroeconomic climate and aid availability –may force

[48] Al-Samarrai, 2002. The cross-country evidence mirrors the micro-based evidence, particularly from the US, which shows the lack of a systematic and consistent link between resources and achievement (Hanushek 1996).

[49] This comes from Herz et al, 1995, pp. 26, 42. Al-Samarrai cites Mehrotra and Delamonica 1998; Penrose 1998.

unanticipated cuts. In such situations, it may prove politically more feasible to cut one item than another—textbooks, for example, rather than teacher salaries. Such situations may lead to distortions or inefficiencies in resource allocation. Differences in the effectiveness of public expenditure management systems across countries may, therefore, help explain the weak link between resources and outcomes.

It is also possible that current allocations of resources across different input categories (e.g. teachers, textbooks, etc) is not optimal for maximizing outcomes. Currently, sufficient information on the impact of different inputs is not available. Controlling for these inputs may explain the lack of relationship between education spending and outcomes.

Beyond spending: Education system reform. Moving away from cross-country regression analyses, reviewing the landscape of successes in country case studies, it is clear that tangible resources are not the only necessary input. Successful reform of education systems has many other inputs.

Political commitment and leadership. Political commitment and leadership were key elements for the successful top-down and wide- scope education reforms in Chile (1980s and 1990s), Ethiopia (1991-1992), and Uganda (1990s) . In these three cases, education reforms were part of a national regime change. Thus, the very strong political commitment towards the reforms was linked to the overall success of the new democratic governments in those countries. Reformers had to work hard to build popular support for the reforms as well as establishing dialogue with key actors. Less dramatic but equally effective cases of strong political commitment towards education reform are found in countries that started reforms within the current political regime, for example the cases of Pakistan (Balochistan Province Reforms between 1990-1998) and India (District Primary Education Program 1995-1999). In New Zealand, education reform towards decentralization was successfully completed thanks to consistent political leadership throughout several administrations. In Mexico, the program Progresa counted on the very strong support of the Zedillo administration and has been renamed as Oportunidades and continued by the Fox administration. [50] And Cuba has a famously effective system, largely traced to its political underpinnings (see Box 6). *[Further work is required to draw upon the literature on the dynamics of and political obstacles to successful education system reform. We expect to draw from recent case studies of large-scale education reform in Bolivia, South Africa and Romania in the 1990s.]*

[50] See Annex 1 for more information on these cases and sources. For a model of national government behavior and the provision of public education see Pritchett (2002) For an account on how education reforms were implemented in New Zealand between 1987 and 1997 see Perris (1998). Political leadership was critical to channel public support, accelerate legislative changes, build alliances with the financial ministry, devise a communications strategy, and gain the cooperation of new and existing staff that had to implement the transition.

Administrative continuity and capacity. Building administrative capacity within education ministries is a consistent concern. It arises whether the immediate topic of concern is gathering and analyzing data, interacting with multilateral and bilateral donor agencies, formulating comprehensive sector plans, engaging in good budgeting processes, or implementing and evaluating specific interventions.

Administrative continuity is a particular concern during reform processes, and many education ministries suffer from high turnover. Corrales notes that in a sample of countries from around the world, average tenure of education ministers is less than two and half years, that the average tenure in office is lower for ministers of education than for ministers of finance, and that longer tenures for education ministers are correlated with quality reforms in education.[51] And of course, there can be continuity of commitment even while there is change of personnel. From 1990 to 1996, a crucial period of its successful education reform, Chile also had three different education ministers.[52]

[51] Corrales, 1999, p. 10. He also notes that this is inconclusive because of the sample size/
[52] Delannoy, 2000, p. 24.

Box 6. The Cuban Education System: Good Performance under Severe Resource Constraints

The official record of Cuban education is outstanding in many dimensions: universal school enrolment and attendance, universal adult literacy, gender parity, equity (by income level and urban/rural), and high learning achievement (according to standard tests). Total public investments in Cuba's education system have experienced severe constraints in the past decades due to the economic isolation and decline of the country. The elements that have kept the education system afloat are related to the continuity of the country's education strategy and its highly structured system:

- Sustained levels of public investment relative to other sectors;
- Emphasis on quality;
- Comprehensive early childhood education and student health programs;
- Complementary programs to reach out to those outside the school system;
- Community participation in the management of schools;
  - Great attention to teachers (pre and in service training, high status), keeping the profession attractive relative to alternative activities (low salaries are prevalent in all sectors; thus the difference is in the non-monetary incentive system);
  - The Ministry of Education evaluates teachers' performance periodically and can effectively fire underperforming staff;
- Low-cost instructional materials of high quality;
- National curriculum is adapted to local needs;
- Competition at the school level;
- Strategies to incorporate children in rural areas and children with special needs;

Source: Gasperini (2000) and presentation of Jeffrey Puryear during the Third Meeting of the United Nations Millennium Project Task Force on Education and Gender Equality, Washington, DC.

Teachers' unions. Bringing teachers unions on board seems to be a significant part of successful reform of education systems. In many developing countries, teachers' unions wield substantial political weight. They are often highly politicized and led by professional politicians who make their careers in union activism.[53] Unions may have effective veto power over educational reforms – if not at the planning stage, then during the implementation, in which their involvement is essential.

Community involvement, local autonomy. The involvement of local communities is also valuable in the process of reforming educational systems. Local communities arguably have the best knowledge about the needs of their children and strong incentive to monitor the performance of teachers and administrators. In some cases, community involvement has contributed to improving school conditions—repairs and maintenance, teaching materials, or housing for teachers. In other cases, community involvement has been helped in supervision of local schools. For example, In El Salvador's EDUCO program,

[53] Bhalla et al, 2003, notes that the Indian Constitution provides for a special representation of teachers in the upper houses of state legislatures, p. 10.

committees made up of local residents are responsible for managing funds from the national government and paying teachers. This increases accountability and has reduced teacher absenteeism. In Uganda, an information campaign sponsored by the federal government has enable communities to monitor more effectively the flow of funds to local schools. And in India, the MAYA program successful supports increased local autonomy over schools (see Box 7). *[In the final version of this report, we anticipate highlighting several successful programs and interventions, as suggested by Task Force members.]*

An effort to link more money to better policy: The Fast-Track Initiative.[54] The Education for All / Fast Track Initiative (EFA/FTI) is one example of a way in which donors have tried to link funding to reforms.

EFA/FTI has several guiding principles:[55]

- *Country ownership,* with the locus of activity and decision-making at the country level, is a long-term development partnership trying to harmonize donor efforts with a view to strengthening the capacity of the partners to manage their own development process efficiently.
- *Support linked to performance*: it links the additional support to partner country performance.
- *Lower transaction costs* by improving coordination and coherence in donor practices in support of country owned education sector strategies, implying a move, where appropriate, towards a sector wide-approach (SWAP) in individual fast track countries.
- *Transparency* through open sharing of information on the policies and practices of developing countries and donors alike.
- *Global benchmarking* with mutual learning on what works.

The benchmarks themselves have several components, in service delivery, system expansion and system financing – each of which reflects the belief (and empirical evidence) that more donor money by itself will not achieve the aims sought. These benchmarks are drawn from the observation of higher-performing countries and are intended to serve as a common international frame of reference. They include: [56]

- average annual teacher salary of 3.5 times the per capita GDP
- pupil-teacher ration of 40:1
- 850 – 1000 annual actual instructional hours

[54] Material in this section is excerpted from Sperling, 2003
[55] Bertrand 2003, p. 26, citing The Framework of the Education for All Fast-Track Initiative, handout by the World Bank, page 2.
[56] Bertrand 2003, pp. 26-27; Bruns et al, 2003, p. 73.

Box 7. Community Participation: The Key to Increasing Effectiveness, Transparency, and Accountability

Among the casualties of El Salvador's civil war of the 1980s was the nation's educational system. A third of the country's primary schools closed, many teachers left their positions, one million children were out of school. Some local communities coped by establishing their own schools, hiring teachers directly. In the 1990s, the new government sought to build on this experience in the process of reestablishing a national educational system. EDUCO, which began in rural areas but was subsequently extended to the entire country, provides a one-year renewable agreement between the Ministry of Education and a school's Community Education Association (ACE)—an elected committee consisting primarily of students' parents. The Ministry of Education oversees basic policy and provides funding; the ACE is responsible for hiring, monitoring, retaining or dismissing teachers via one-year renewable contracts.

Enrollment has increased swiftly in EDUCO schools, which serve the poorest areas. Their test scores, grade promotion and repetition rates are comparable to those of traditional schools. Parent involvement in EDUCO schools -- visiting classrooms, meeting with teachers, and maintaining school physical plants -- has been key to their success. Evaluations of the program indicate that parent involvement has had a positive impact on learning and has helped raise test scores. With additional parent supervision, teachers are less likely to be absent from EDUCO schools than from traditional schools. Parent associations are also able to use the flexible compensation scheme and annual contracts to motivate better performance from teachers.

In India, the Prajayatna is a citizen's initiative, facilitated by MAYA (a local NGO) that seeks to bring sustainable educational reform by strengthening institutions of local self-governance and civil society . Periodic meetings and councils at the school, administration, and state government level enable the process of continuous education improvement. This initiative works with the parents, teachers, and administrators of 15,000 government schools in Karnataka Province (India). The consultation process has produced a data bank for more informed decision- making. The rapid dissemination and success of MAYA's program is due in part to the methodology of participation used, which incorporates the culture and characteristics of local communities. MAYA's facilitators have strong leadership qualities to catalyze common thinking and action.

Sources: World Bank. World Development Report 2003-2004; MAYA 2002 Annual Report (www.mayaindia.org) and Field Visit of the United Nations Millennium Project Task Force on Education and Gender Equality (July, 2003).

- average repetition rate of 10 percent or lower
- publicly domestically generated revenues of 14 to 18 percent of GDP
- recurrent spending on education at 20 percent of government revenues
- primary education share of the education budget at 42 to 64 percent (depending on length of primary cycle)

Eligibility to be considered for funding under the EFA/FTA is based on two further criteria:

- a formally adopted national Poverty Reduction Strategy Paper that integrates the education plan into overall national development priorities;
- education sector plans, agreed with donors.

As for the donors, the financing structure put forward by the FTI did not envision a pooling of donor resources into a common fund, but instead, a coordinated process of periodic donor meetings to assess and fill existing funding gaps.

[The section that follows on the Fast-Track initiative was prepared several months ago, and requires extensive updating. The revised section will be completed within the next several weeks.]

In June 2002, a first set of 18 low-income countries that had both PRSPs and education sector plans were invited to submit EFA plans. Five other countries, deemed priorities because together they account for 50 million of the 104 million children total estimated to be out of school, were invited to participate, since they lacked PRSPs and education sector plans.

By November 2002, 10 countries had developed and submitted education plans for approval and funding.[57] Of the ten, seven were approved for funding, while three were asked to do additional work on their plans and resubmit them for funding at the next donor consortium meeting in the spring of 2003 (see Table 6). The funding gap for implementing the seven approved country plans over the first three years was calculated at $430 million. Of that $430 million in additional resources identified, just over $100 million in new donor contributions was committed at the time of the November meeting. Donors collectively committed in principle to provide the rest of the necessary resources at future meetings.

While the November meeting did mark the approval of the first group of seven country plans, and some funding was designated to get those plans underway, the overall impression left by

[57] Recent research by ActionAid found that in a few cases, FTI planning during this period was done by just a few individuals, with little communication either with the rest of the government or with civil society. UNESCO, 2002, also has also assessed sixteen full PRSPs. It finds universal primary education clearly delinieated in all but one case. Only seven, however, retain the goal of eliminating gender disparities in primary and secondary education, p. 19.

the donors was less than encouraging to countries considering reforming their education systems as part of the FTI process. There was no talk of making contingent funding commitments, and the impression was left that when countries submitted good plans, donors would see how much money they could pull together, and approve plans and disburse funds accordingly.

Table 6. Countries considered for FTI funding				
18 Countries Invited into First Round of FTI			Other Countries to be Considered	
Approved for Funding in November 2002	Submitted Plans November 2002; Approved March 2003	Scheduled to Subr Plans by Novembe 2003	Countries in "Analytical Fast Track" with many unschooled children	Possible Second Round FTI Countri
Burkina Faso Guinea Guyana Honduras Mauritania Nicaragua Niger	The Gambia Mozambique Yemen	Albania Bolivia Ethiopia Ghana Tanzania Uganda Vietnam Zambia	Bangladesh D.R. Congo India Nigeria Pakistan	Kenya Kyrgystan Rwanda Senegal Tajikistan

The second meeting of the Donor Consortium was held in March 2003. Donors again committed only minimal amounts of funding: another $107 million to fund the first seven approved countries over three years, bringing the total money committed to these countries to $207 million.

The donors also clarified a number of aspects of the FTI process and the roles of various actors:

- Donors decided that the process for determining the viability and readiness of FTI country plans will be conducted at the country level by donor agency representatives on the ground, in conjunction with the FTI secretariat a the World Bank. The high-level consortium meetings, therefore, will no longer undertake the task of reviewing and approving specific country plans.

- The primary method for funding approved plans will also be through the regular aid processes of donor agencies at the country level. The semi-annual consortium meetings will be used to review overall progress and to consider additional funding in those circumstances where resources are not being effectively mobilized at the country level.

- Approved but unfunded developing country plans (donor orphans) are to be handled by volunteer donors of last resort. The Netherlands and several other countries expressed interest in playing this role, and to put in place a flexible pool of last-resort funding by September 2003.

- In addition to sector plans, FTI countries will draft memoranda of understanding (MOU's) between the government, all aid agencies, and NGOs and other actors, which will set out in specific detail roles and responsibilities, and unify all reporting requirements around a single set of indicators.

- The World Bank will continue to play the role of monitoring both donor and recipient country progress, and will more systematically collect information about donor harmonization, to encourage increased accountability.

The process by which non–FTI countries become eligible for funding consideration under the FTI was also clarified. The donors agreed in principle that any IDA-eligible country with a PRSP and an education sector plan is now eligible to submit a plan for funding consideration under the FTI. Moreover, provided the plan is adequately designed (it emerges from a proper dialogue at the country level and includes annual progress targets toward sustainable, quality universal education and appropriate attention to girls' issues and AIDS prevention, etc.), developing countries can simply submit their education sector plan from their PRSP into the FTI process, rather than creating an entirely new document.

Diluting the clarity of this potential step forward is the fact that not all donors were willing to endorse the change at the March meeting. Some expressed reservations about admitting more developing countries to the FTI process before all of the countries in the first round receive funding. The United States has been the most reluctant of all the donors to expand the FTI, alone contending that results of FTI interventions with the first round of countries should be evaluated before expanding the FTI to other countries. Despite agreeing in principle to admitting countries on the basis of their completed PRSP's and education sector plans, the donors must still agree by consensus to admit these new countries into the FTI.

While the FTI has been generally welcomed, UNESCO notes the concern that has been expressed at the speed and extent of domestic policy required to improve efficiency and raise revenues. There is also a danger of ignoring many of the countries that are "off track" for reaching the EFA/MDG goals but that do not meet FTI criteria.[58] The World Bank underscores that the intent of the FTI is to accelerate progress and learn lessons from countries that are already on track to reach the goals, as well as to support those off track.[59]

Donor reactions to the FTI and prospects for additional support. The reaction of various donors to the FTI has ranged along a spectrum from outright skepticism to strong rhetorical support. The overall low levels of additional funding elicited by the FTI demonstrates a lack of a major high-level commitment to this mechanism, but is also indicative of a larger lack for support for basic education within donors' aid budgets. The total G-7 contribution for 2000-2001 was $639 million, about 3 percent of these countries

[58] UNESCO, 2002, p. 24.
[59] Bruns, et al, 2003, p. 17.

total bilateral aid budgets and only three-one thousandths of a percent of their combined GDP.

Despite the range of donor reactions, the Education For All Fast-Track Initiative is unquestionably the most promising effort to-date to support and consolidate a global compact on education. But in important areas, the FTI is falling short of the notion of a true global compact, and without addressing these shortcomings, will not present a viable structure for achieving the goal of universal education by 2015.

FTI strengths. Perhaps the strongest aspect of the FTI process has been the "virtual fund" concept, where donors can coordinate funding decisions without ceding important bilateral control. Through the semi-annual donor meetings, donors are able to more clearly understand which developing countries are already receiving assistance and which are not, allowing them to adjust their aid accordingly. This structure, if strengthened rather than stalled in upcoming meetings, could represent a major innovation in development financing.

Progress on-the-ground. In addition, the FTI has substantially increased coordination on the ground in a number of countries. Honduras, for example, has taken advantage of the FTI's new MOU process to lay out in impressive detail a three-year reform plan and lock in *ex ante* support not only from all donor agencies but also from the Honduran ministries of Finance, Planning, and Education. In Niger, all on-the-ground actors in the education sector have signed onto a partnership agreement, which secures unified support for their national plan, and, importantly, lets the Education ministry operate with one common set of reporting requirements for all donor agencies. As the FTI gains more experience in implementing this MOU-type model, a greatly improved level of coordination and efficiency at the country level could become the standard in all FTI countries. Also, by decentralizing the decision-making process for approving countries education plans, the FTI could further increase donor harmonization on-the-ground.

FTI's weakness: Lack of visible and high-level commitment to inspire broad action toward the 2015 goal. Any global compact needs a high-level and visible commitment from major donors to provide confidence that funds are available for those who rise to the occasion, and to offer broad incentives for reform. Without that level of commitment – both in terms of providing contingent resources and clarifying the structure of the compact – there is a limited amount that the FTI, no matter how well designed, can accomplished. Despite the progress in harmonizing efforts on the ground, the FTI has been less successful in drawing out high-level commitment from Heads of State and Finance Ministers in donor countries. Those who participate in the UNESCO EFA meetings and the FTI donor consortium meetings often do not have the political mandate to reallocate significant aid resources to support universal education.

Redefining the role of business and the private sector in basic education.[60] [61] While the funding and provision of education belongs first and foremost to governments, the private sector has long been engaged in supporting basic education both in developing and developed countries. Businesses have a strong and unique set of skills, and can offer significant financial and other resources[62] to fill the gaps in what is normally considered to be a public good. This has occurred through individual direct philanthropy for specific projects, in coalitions such as the Business Trust (South Africa) for both advocacy and provision, and in more strategic, long-term engagements such as Educa (Dominican Republic)[63]. However, beyond narrow, individualized cases of strategic, long-term engagement, it can be difficult to create incentives for broad and sustained corporate support for basic education (as opposed to skills training or higher education) in part because of a relatively significant mismatch in the timing of desired outcomes for each of the sectors. Businesses are motivated by actions that result in immediate outcomes and direct returns while investments in education require a much longer timeframe to yield results in the local economy (see Figure 5). Despite this mismatch, the private sector as a whole remains engaged in many countries in the provision and financing of education, mostly through individual company philanthropic giving to local NGOs or schools, and through household expenditures. As noted elsewhere, these funds pay for everything from infrastructure to books to teacher salaries.

The business sector's motivations for supporting effective basic education range from the problems of weak productivity and high training costs arising from the absence of a workforce with at least a basic education, to supporting employee morale and the needs of their current employees and their families. Additionally, individual household subsidies are motivated by parents' desires for their children to be educated. In Sub-Saharan Africa, the range of private expenditures on education extends from a low of 15 percent in Senegal to a whopping 90 percent of the education expenditures in Zimbabwe due to the breakdown of the public sector.[64] Private expenditures of this magnitude tend to arise out of necessity, including shortfalls in government commitment, skill deficits in the labor force and employee demand.[65]

---

[60] This outline was prepared by Julie Kennedy, Magna International, with contributions from Tracy Breslin, Thomas Haven, & Laila Kuznezov at Harvard University.

[61] The suggestions presented here do not attempt to be an exhaustive examination of best practices or a comprehensive analysis, but rather intend to stimulate considerations of "next practices" for business support of the achievement of the universal education goal.

[62] Businesses contribute not only financial resources, but also knowledge, expertise, ideas about management, contacts, "power" in advocacy/policy, and more

[63] www.btrust.org.za, Tietjen, Karen. Multisectoral Support of Basic & Girls' Education. SAGE Project, October 2000.

[64] Michael Klein from the IFC said "in many cases, where services exist, they are provided by private sources. Anywhere from 15% (in Senegal) to 90% (in Zimbabwe) of primary education is provided in private schools. Some 63% of health-care expenditures in the poorest countries are private, as against 33% in high-income OECD countries." UNESCO 2000

[65] Schemo, Diana Jean. "The A B C's of Business in Brazil; Companies Pitch In Where Public Education Leaves Off". 1998, 16 July. The New York Times.

When considering both the financial resources and the reform agenda that are required to achieve the goals of universal primary education and gender equality in education, it is useful to return to the concepts of evolution versus transformation. To achieve the dramatic and change-creating actions needed to induce measurable progress toward these goals, the role of businesses should be more strategically defined and transformation-focused. Corporate giving of any sort can be positioned along a continuum that extends from philanthropic to strategic investment. The most effective investments are those that occur as strategic investment, as part of the company's corporate goals, tied to top management and directors rather than sequestered in a corporate giving department that is not linked to the strategic outcomes of the company. As private sector investments can be a critical input to addressing the gaps required to achieve the goal, and as these investments arguably only gain critical mass and influence when pooled, it is worth considering ways to delineate possible paths to cooperation amongst businesses in a sector that prefers unilateral action.

Figure 5. The Timeline and Outcomes Disconnect

	Present/ Short Term	
Private Sector Action area[1]		***Education Sector Action area[2]***
Factor Conditions – human resources		
Increasingly skilled labour-force pool		
Increased employee morale and satisfaction with job		*Service provision*
Demand Conditions		More schools built
Expanded customer base		More school supplies provided
Enhanced public image, reputation, legitimacy		
Related Supporting industries		
Increased support to and interaction with suppliers		
Increased support to and interaction with clusters		
		Policy advocacy & Opinion-making
Context for Strategy and Rivalry		Policy change and reform
Improved government relations	Mid-Term	Leverage and increase awareness of role of education
		Increased political awareness
		New advocacy bodies created
		Institutional linkages & partnerships formed
	Long- Term	
		Human output
		Increased public awareness/attitude change
		More educated graduates
		More women graduates
		Better educated parents & families

Education does not produce enduring benefits until a minimum threshold (in terms of years of schooling) is reached, while business is driven by short-term goals usually driven by profit and output. As a result, it can be difficult to create a strategic connection between basic education and a company's strategy unless the deficits are sufficient that they impact a company's ability to function and provide an immediate need for action.

[1] From Porter, Michael E., Kramer, Mark R. "The Competitive Advantage of Corporate Philanthropy" Harvard Business Review, 12/02
[2] Excerpted from Tietjen, Karen. Multisectoral Support of Basic & Girls' Education. SAGE Project, October 2000.

Message 5. Focus on the hardest-to-reach. Reaching out-of-school children will take special efforts, beyond what is typically thought of as "scaling up."

Expanding access to and completion of primary schooling implies reaching the children who are from households that are at society's margins. Most of the roughly 104 million school age children who are not attending school are from poorer segments of the population, are disproportionately female, and are the children of uneducated and illiterate parents. In all countries, poor children and girls are less likely to start school, more likely to drop out, and more likely to engage in child labor or domestic chores that keep them from schooling. Therefore, universalizing primary schooling cannot be achieved without addressing the specific reasons that keep poor children and girls out of school, repeating grades, and dropping out. Moreover, focusing on the hardest-to-reach, instead of the "next easiest to reach" groups, has the potential to trigger social transformation toward greater equality. Under no political economy scenario would middle-class children be excluded from access to education if much poorer children are gaining entry (and staying in school); thus, it may be possible to focus on the poorest and, in a sense, let the needs of the middle class be met "naturally."

In most of the world's countries, rich children are in school and complete primary schooling.[66] In many developing countries, both middle and low-income children are out of school, although patterns vary by region and overall level of poverty. In Africa, the number of children who never complete primary school is very large and they come from almost all income levels. In South Asia, failure to complete schooling is more concentrated among the poor. For example in India, 38 percent of children never complete grade 5, of which 61 percent come from the poorest 40 percent of households. In South America a smaller fraction of children fail to complete fifth grade, but they are disproportionately poor. The number of children who do not complete fifth grade ranges from 12 to 32 percent and over 70 percent of them are from the poorest 40 percent of households. In East Asia, too, the children out of school are overwhelmingly poor.

The gap between rich and poor children is apparent from comparisons of median grades completed. In Western and Central Africa, the median grade completed of the bottom 40 percent is zero because fewer than 50 percent of poor children complete even the first year of school. By contrast, the wealthiest quintile has a median of four to six years of completed schooling. The gap between rich and poor is highest in South Asia. India has the largest gap of all, 10 years difference between the median attainment of the poor (zero years) and the rich (10 years). For Pakistan, the difference is nine years. In Latin America, the gap is smaller, approximately 4 years difference in median grade completed between rich and poor. In Eastern and Southern Africa, the gap is smaller, ranging between one and three years; while in East Asia, the gap is three years.

[66] The following data is from Filmer and Pritchett, 1998.

In some countries, the main reason for low educational attainment is that children do not enroll in school. In Benin, Burkina Faso, Cote d'Ivoire, Mali, Niger, Senegal, Bangladesh, India and Morocco more than half of the children from the poorest two income quintiles never even enroll in school. Low rates of enrolment are generally a problem among South Asian countries. In other countries, enrolment may be almost universal, but high repetition and drop out rates lead to low completion. This is a common pattern found in Latin America. In both cases, poor students are found among those who fail to complete – either because they are less likely to enroll or less likely to progress through school.

The patterns are similar for girls. Of the 104 million children out of school, 65 million are girls. In Sub-Saharan Africa, only 55 percent of girls attend primary school and 17 percent are enrolled in secondary school. In a number of African countries, the situation is distinctly worse. In Niger, Chad, and Burkina Faso, less than 30 percent of girls age 6-11 are enrolled in school. The gap in boys and girls schooling is also prominent in South Asia, where 20 percent fewer girls than boys are enrolled in primary school.[67]

The drop-out rate is also problematically high for girls. This is of particular concern because many returns for education for girls seem to begin only after a threshold of several years of schooling have been reached (see earlier section). In more than half of African countries analyzed in a recent study, the primary completion rate for girls is below 40 percent.

Direct and opportunity costs. Many direct and opportunity costs fall on the poor and the families of girls, discouraging them from getting schooling. Direct costs, which are generally similar for boys and girls, include school fees, books, materials and uniforms. Particularly where public spending on education is low, household spending on education can be significant. This places a particular burden on poor households in developing countries, for whom spending on education can reach 20 percent of household income.[68]

The opportunity costs for schooling can also be high in poor families that depend on input from each family member. Children's foregone earnings is one opportunity cost, in situations where there are labor markets for children.[69] The value of chore time, particular from girls, can be a greater issue. In much of Asia and Sub-Saharan Africa, girls are kept out of school in order to assume a burden of household work that includes care of young children and the ill (increasingly those with AIDS), collecting wood and water, household chores of cleaning and cooking, such time-consuming farm labor as pounding grain. While in principle these tasks could also be accomplished by boys, in practice they aren't. Time-use studies from around the world reveal greater investment of girls' time than boys in household tasks. Studies in Malawi, Burkina Faso, Kenya, India,

[67] UNESCO 2002, Filmer 1999, Oxfam 2001.
[68] Herz et al, 1995.
[69] Although Ravallion and Wodon, 2000, doesn't support the view that child labor keeps children from poor families out of school.

Nepal, and Java all confirm that girls get involved in household production at a much younger age and work longer than boys.[70]

Studies show that girls' household activities have a greater impact than boys' activities on the parents earnings, particularly in Asia and Africa.[71] Girls' work at home often permits parents, especially mothers, to work more on the farm or in the paid labor force.

Social and cultural traditions can also create additional costs for girls schooling. In situations where girls are particularly subject to physical harassment or attack—whether on the way to school or from teachers and male peers in school itself—this raises costs for security. Where girls' privacy is both highly prized and also not respected, there may be need for separate lavatory facilities. Where females are kept in seclusion, educating girls may require separate schools and teaching faculties.

Limitations on the returns to female schooling also affect parents' decisions to send girls to school. Where women are excluded from or discriminated against in the labor market and where they earn less than men, parents' incentive to educate their daughters is weakened. Legal or regulatory barriers to women's participation in the labor force or policies that effectively restrict women's access to information and resources help perpetuate the tradition that girls stay home from school and do more chores.

Interventions. Some interventions are specifically targeted at getting poor children and girls into school and keeping them there. These make schools affordable, reducing direct costs for poor boys and girls and addressing some of the added opportunity costs for girls. They also increase demand for schooling, through such measures as contingent cash transfers and school feeding and health programs.

Eliminating school fees. Eliminating or reducing school fees substantially has resulted in substantial increases in enrollment, particularly for girls. When free schooling was introduced in Uganda in 1997, primary school enrolment doubled from 3.4 to 5.7 million children, rising to 6.5 million by 1999. Total girls' enrollments increased from 63 percent to 83 percent, while enrolment among the poorest fifth of girls rose from 46 percent to 82 percent.[72] In Tanzania, the elimination of primary school fees in 2002 resulted in additional enrolment of 1.5 million students.[73] A scholarship for girls in Tanzania also significantly increased their enrolment in secondary school. The program was subsequently extended to boys as well. In Bangladesh, a stipend for girls in secondary school substantially increased their enrolment, particularly in rural areas.[74]

[70] See studies cited in Herz et al, 1995, chapter 3.
[71] Herz et al, 1995, citing Hyde 1989
[72] World Bank, 2002.
[73] Coalition for Health and Education Rights, 2002.
[74] World Bank 2001.

The increased enrolments that result from the elimination of fees are an important achievement, but can also be a significant strain on educational systems. In Malawi, for example, the elimination of school fees in 1994 led to a 55 percent increase in enrollment. The additional 1.2 million students overwhelmed the capacity of Malawi's schools.[75] The abolition of school fees in Tanzania has also resulted in overflowing classrooms. Further, reducing or eliminating tuition has little impact if school districts are subsequently permitted to levy additional fees such as building funds and student activity fees. In Kenya, despite the elimination of tuition in 1974, such fees quadrupled the cost of schooling in some districts, resulting in a substantial increase in the drop-out rate, particularly in poorer districts.[76]

Conditional transfers. Programs for conditional cash transfers for education provide resources directly to targeted beneficiaries only when they keep their children in school. Such programs serve as social safety nets, raising the immediate incomes of impoverished families, while also achieving a development purpose by increasing the human capital of the poor via the education of poor children. Conditional transfer programs are well established in Mexico (Progresa), Brazil (Bolsa Escola) and Bangladesh (Food for Education). Such programs also exist or are being planned in Nicaragua, Honduras, Chile, Argentina, Ecuador, Colombia, Jamaica and Turkey.[77] In addition, The World Food Program assisted 27 countries with "take-home rations" programs in 2002: Afghanistan, Bangladesh, Benin, Cambodia, Cameroon, Chad, China, Djibouti, Eritrea, Ethiopia, Ghana, Guinea, Guinea Bissau, Iran, Korea, Laos, Malawi, Mali, Morocco, Mozambique, Myanmar, Niger, Pakistan, Rwanda, Tajikistan, Uganda, and Yemen.

In Mexico, Progresa (now known in an expanded form as Oportunidades) rovides cash transfers to poor households in the most marginal rural areas conditioned on children attending school regularly. It has increased enrolment rates at the primary and especially the secondary levels, for boys and especially for girls. The greatest impact occurs at the sensitive transition year to secondary school, with a 20 percent increase in enrolment for girls and a 10 percent increase for boys. The program is expected to increase educational attainment for the poor by 0.66 years of additional schooling by grade 9.

In Bangladesh, Food for Education (FFE) provides a monthly in-kind food transfer (primarily wheat) to poor households conditioned on school attendance by primary-age children. In participating schools, enrolment increased by 35 percent (44 percent for girls and 28 percent for boys) compared with 2.5 percent nationally over two years. Attendance and drop-out rates also compare favorably in FFE schools.

Nicaragua's conditional cash transfer program for poor households with children in primary school has also produced results. Enrolment increased by 22 percent, with the

[75] Rugh 2000.
[76] Herz et al 1995.
[77] Morley and Coady, 2003.

poorest households benefiting most. Grade progression also improved, again with better results for the poorest.

School feeding. School feeding programs disproportionately benefit poor children by creating incentives to enroll and attend school, and by improving health, attentiveness, and capacity to learn. Offering food at school is an effective way to encourage children who are poor and chronically hunger to attend classes. In Bangladesh, school-based food distribution increased enrolment by 20 percent compared to a 2 percent decline in non-participating schools over the same period of time.[78] In Jamaica, Tamil Nadu, and other places where school feeding programs were evaluated, attendance and retention generally rose.[79] In Kenya, a randomized control study demonstrated that children's school participation was 30 percent higher among students attending schools with feeding programs.[80]

The FAO estimates that 300 million children are chronically hungry, most of whom are in developing countries. Without breakfasts, students are more easily distracted in the classroom and have problems staying alert and concentrating on lessons. Studies in many countries suggest that hunger affects cognitive functions and may thereby impair a child's ability to benefit from schooling. For example, a program that provided breakfasts to primary school children in Jamaica significantly increased arithmetic scores.[81] School feeding programs that address specific micronutrient deficiencies have also been shown to improve school performance. For example, iron supplementation raised test scores among children in India.[82] In Kenya, students participating in a feeding program also had higher test scores but only in those schools where teachers were relatively well trained before the program started.[83]

Reviewing this evidence led the International Food Policy Research Institute to conclude that "Hunger is a barrier to learning. . . . A hungry child cannot concentrate. A hungry child cannot perform. Hungry children are unlikely to stay in school. School-based feeding programs have proven effective in encouraging enrolment, increasing attention spans, and improving attendance at school."[84]

World Food Program case studies in Pakistan, Morocco, Niger and Cameroon show strong improvements in enrolment and attendance when families receive food incentives in return for good school attendance.[85] The enrolment of girls in the North West Frontier and Balochistan Provinces of Pakistan, for example, increased by 247 percent and 197

[78] Ahmed and Billah, 1994
[79] Simeon and Grantham-McGrego, 1989; Babu and Hallam, 1989
[80] Vermeersch, 2002
[81] Simeon & Grantham-McGregor 1989
[82] Seshadri & Gopaldas 1989
[83] Vermeersch, 2002
[84] IFPRI 2001
[85] World Food Program, 2001

percent respectively, between 1994 and 1998. Student attendance and dropout rates were also positively affected. Each month, a 5-liter tin of vegetable oil is distributed to the family of each female student who attended school for a minimum of 20 days.[86] In Morocco, girls in targeted rural communities who attended regularly were given 100 kilograms of wheat and 10 liters of vegetable oil per year for good attendance. Within the first two years of the program, female entries in the first grade doubled, and in one province covered by the project, girls comprised 43 percent of total primary enrolment in 1999, up from 10 percent in the early 90s. [87]

School health programs. School health programs also contribute to improved school attendance. For example, school-based mass treatment of children for hookworm in Kenya was shown to reduce student absenteeism by one-quarter.[88] In India, a program to provide iron supplementation and deworming medicine to preschool students decreased absenteeism 7 percent among children age four to six.[89] *[We expect to add more information about the cost-effectiveness and implementation of school health programs in a future version.]*

Especially for girls. Given the particular barriers to girls' education, specific interventions are needed to make schools more accessible and secure for this population.

Decreasing the distance to school encourages girls' enrolment and attendance, due to concerns for safety and reputation. Research in such diverse places as Ghana, India, Malaysia, Peru and Philippines indicate that distance matters for all children, especially for girls.[90] Providing schools within local communities has been shown to substantially increase enrollments in Indonesia, Egypt and several African countries. The impact is particularly pronounced for girls. In Egypt, for example, following a campaign to construct rural primary schools, girls' enrollments grew by 23 percent compared with an 18 percent increase in boys' enrollments.[91]

Schools also need to be safe places for girls. This includes being free from harassment from male peers as well as safe from predation by male teachers.[92] In Cameroon, for example, UNICEF reports that teachers had had sexual relationships with 27 percent of the girls surveyed.[93] Clearly this involves significant cultural changes. One minimal but essential step toward making schools acceptable environments for girls is providing private latrine facilities. Experience across thirty African countries, for example, indicates that where no private latrine facilities are available at school, a majority of

[86] Word Food Program, UNESCO, 1999
[87] UNESCO/Word Food Program
[88] Miguel and Kremer, 2003
[89] Bobonis et al, 2002.
[90] Sipahimanlani 1999; Lavy 1996; Gertler and Glewwe 1992; King and Lillard 1987.
[91] Duflo 2001, Rugh 2000, Filmer 1999.
[92] Lloyd and Mensch 1999.
[93] UNICEF 2002

young women do not attend school during menses because they lack an adequate way to care for personal hygiene.[94]

Girls and their families may find little reason to attend school if what they're taught there is that girls are of less value than boys or if they are tracked into fields of study or towards low-paid occupations considered traditional for females. Analyses of textbooks in Africa, the Middle East, Asia and Africa consistently find heavily stereotyped material, with women portrayed as subordinate and passive while men display intelligence, leadership and dominance.[95] Many developing countries also practice gender streaming in secondary school, directing girls away from math and science.[96] Teaching practices—such as giving boys more opportunities than girls to ask and answer questions, use learning material and lead groups—may further discourage girls.[97] Several countries in Africa and Asia are beginning to use gender sensitivity training for teachers and administrators to encourage girls' participation.[98]

Providing female teachers for girls may address some security concerns as well as providing useful role models. International cross-section data suggest some positive correlation between gender parity in enrolment and the proportion of female teachers.[99] Qualified female teachers, however, are in short supply. Young women are now being recruited, particularly in rural areas. Their lack of educational qualification may be compensated for by their knowledge of and commitment to local communities.[100]

Opportunity costs for girls' education that arise from their large burden of household chores can be addressed in a variety of ways. Some measures reduce the need for girls work: providing day-care centers and pre-schools for younger siblings or for students' children; improving the supply of accessible water and fuel. Others—such as flexible school schedules --enable girls to pursue an education while maintaining household responsibilities. Take-home food rations for the families of school-attending girls can offset the loss to the household of the girls' labor. Flexible schedules, double sessions, and evening school hours have been introduced in Pakistan, India, Bangladesh, Morocco and China.[101] There do not appear to be any programs designed to have boys take a larger share of the domestic load.

Children in conflict and post-conflict societies. One of the most dramatic cases of lack of access to education are children in regions that are undergoing armed conflict or are

[94] Forum for African Women Educationalists 2001. See also World Bank 1996 and World Bank 2001.
[95] See numerous studies cited in Lloyd and Mensch 1999, p. 93 and Herz and Sperling, pp.41-42.
[96] Herz et al, 1995.
[97] UNICEF 2002
[98] UNICEF 2001.
[99] Herz et al, 1995, p. 48.
[100] citations in Herz and Sperling, p. 44
[101] Herz et al, 1995.

recovering from conflict. The education programs presented in Table 7, show that the provision of education during conflict and post conflict is:

- Possible in spite of hardship for children, teachers, and program administrators;
- Essential for nation building and re-building;
- Needs to start during conflict and immediately after conflict (cannot wait until "security" is established), otherwise a generation maybe lost;
- Is part of a national healing and reconstruction process

Table 7. Primary education provision in post-conflict settings: Asia and Latin America			
Context	**Objectives**	**Activities**	**Lessons Learned**
Laos: National Primary Teacher Training			
Lao, PDR is one of the poorest countries in Asia. Less than 1 in 4 children finished primary school (early 1990s). Large rural population in remote areas. Numerous ethnic minorities. Civil War (1960-1975) caused brain drain, injuries and death of trained teachers (one third of teachers are untrained), destruction of schools and infrastructure, and unsafe conditions for children and teachers (unexploded bombs).	-Develop "in-service" training model for teachers in the poorest remote rural areas; - Raise the quality of primary instruction.	-On the job training for supervisory and training personnel (17 provinces); -Training 50 teachers per district in a 2 year "in – service" program; -Training takes place in two stages: workshops during school vacation in provincial centers and supervised teaching at the village school during the school year; - Training includes sessions for parents and parents associations.	-Program has operated since 1992 and trained 8,000 teachers to date; -Enrolment increased and drop out rates went down; -Parent involvement was critical in supporting the training and rebuilding schools; -Workshops paired with supervised teaching led to tangible improvement on teaching quality and wide coverage; - Modular approach facilitated keeping training up to date and address specific issues of each village.
Vietnam: Multigrade Teaching and Alternative Basic Education			
-Post war Viet Nam suffers: isolation, poverty, human loss, and damages on infrastructure and natural resources; -Large development gaps among different geographical areas (large urban/rural gaps); -Shortages of teachers; -High drop out rates for girls, poor children, and ethnic minority children;	-Increase enrolment among "hard to reach" children (mountainous areas, destitute children, and ethnic minority children; -Increase education effectiveness (literacy and numeracy) and cost effectiveness; -Incorporate	**Multigrade Teaching in remote rural areas:** -Uses a shortened 120 week modular curriculum; -Self –paced learning and peer tutoring; -Wide range of learning materials; -Specific training and support for teachers. **Alternative Basic Education :** -Serves marginalized street and working children in urban slums	-Enrolment in rural areas and enrolment of ethnic minority children has increased ; -Multigrade teaching is not always the cheapest option but is likely to be more cost-effective than isolated interventions; -Multigrade teaching requires special teacher training and the development of new textbooks and materials for students; Teaching/learning modular units can be

-Large number of street and working children, as well as orphans; -In the early 1990s the government embarked in the Doi Moi Process, a set of socio-economic reforms.	local culture (collective meaning) into the curriculum.	and rural areas -Focuses on reading, writing, and numeracy; -Uses a shortened 100 week modular curriculum; -Self –paced learning and peer tutoring; -Wide range of learning materials.	implemented in the whole country but should be adapted to local settings; -Alternative basic education constitutes a bridge to enter or re-enter the formal education system; -Community participation (schools, local authorities, civil community, local NGOs, and religious groups) is key to the success of these interventions
El Salvador: Education Sector Reform			
-The country is still under the effects of a 12 year civil war and two devastating earthquakes; -During the 1980s civil war investment in education was low, there were serious shortcomings in the supply of schooling in rural areas, and school buildings were damaged; -In the early 1990s the country started an overall post-conflict reconstruction effort.	-Increase enrolment, especially for poor children in rural areas and girls; -Increase equity in the provision and quality of education (gender equity and income level equity); -Provide inputs for education quality.	-Decentralization and community participation (EDUCO program); -Increasing investment in education; -Curriculum reform; -Legal reform; -Teacher training; -Creation and reform of evaluation systems	-A context of dialogue and flexible design were key to implement the reforms, obtain information, and apply correctives promptly; -Community participation was essential to increase coverage and improve quality; -Direct involvement of private institutions and NGOs in the discussion and implementation of policies was very important to the sustainability of many programs; -Effective policies for teachers professional development are needed; -Limitations to school autonomy must be considered; -Linkages between educational levels should be established; -Evaluation should be a tool for change.
Indonesia: Early Childhood Education for Internally Displaced Children			
-Ambon ethnic and religious conflict between 1999-2001 destroyed schools; -Conflict generated as many as 300,000 people displaced at	-Create a participatory learning approach, culturally and environmentally sensitive;	-Selection of tutors; -Community participation in the design of each specific program; -Discussion with parents to develop activities for children;	-Impact on children: less aggressive behavior, more cooperation, better attention, and more assertive communication; -Program has been duplicated in many

the height of combat; -Limited teachers (segregated into religious groups); -Scarce educational resources; -Unsafe environment for children and teachers.	-Break the cycle of violence by working with children; -Prepare young displaced children for formal schooling;	-Monitoring; -Tutors' supervision.	camps for displaced communities; -Community participation and initiation of the program was key to its success; -Raising sense of control is part of the healing process; -Concept of pluralism, tolerance, and reconciliation can be encouraged since early childhood.
Source: Inter-Regional Symposium on the Future of Children and Youth in Countries with Conflicts in Latin America and Asia. Inter-American Development Bank and The Rise Institute. November, 2003. Information based on the following presentations: Sangdeuane Lachanthaboun, Khamla Phoumsavanh, and Anne Thomas (Laos Program); Douong Van Thanh (Viet Nam Program); Jose Luis Guzman (El Salvador Program) ; Sondang Irene Erisandy, Livia Iskandar-Dharmawan, and Bai Tualeka (Indonesia Program)			

[We will insert textbox on Roma children.]

[Section to be inserted on disabled children.]

[Section to be inserted on problems of children in households facing economic shocks.]

[Section to be inserted on challenges of "scaling up" small programs.]

[Section to be inserted on issue of girls in rural areas.]

Message 6. Think holistically. For education to reach its potential to contribute to economic growth, it needs to be accompanied by sound, broad-based economic reform.

Education is, first and foremost, an end in itself: an essential ingredient for the full realization of human capacity, within the tradition of Human Capacity Theory. In this framework, education is essential for making informed choices, for seeing beyond the immediate horizon and opportunities, and for having a voice in public decision making. Education is a counterweight to limits on social and economic mobility that are imposed by cultural biases, gender and ethnic discrimination, and history.

While education clearly has intrinsic value, some of the benefits of education – particularly its effects on economic growth and on women's empowerment – are highly dependent on context, which in turn is affected by policy decisions and actions outside of the education sector *per se.*

Education and economic growth. Investment in more education will not, by itself, lead to economic growth or to increased demand for education by subsequent generations. This seems paradoxical given the evidence that *for a given individual* more education is associated with higher income and higher educational attainment of children. This seeming paradox is resolved by recognizing that the *context* within which educational investments occur can enhance or neutralize the potential gains from education. This fact does not mean that education should not be pursued for its intrinsic value or for its various social benefits. However, it does mean that investments in education need to be complemented by policies to improve governance, investment climates, and labor market incentives if the material promise of greater education is to be realized for society as a whole.

For individuals, the benefits of education are clearly demonstrable and consistent across many settings. A large literature has demonstrated that individuals with more education have higher incomes. Simple regressions of wages on years of schooling provide consistent and robust estimates showing that an additional year of schooling is associated, on average, with 10 percent higher wages.[102] This average masks variations across regions, labor market segments, age, and sex, but the underlying association is almost without exception positive and statistically significant. The measured returns to education tend to be higher in developing countries than developed countries; higher in Latin America and Sub-Saharan Africa compared to Asia, Eastern Europe, the Middle East and North Africa; and higher for women than for men. The estimated returns to a year of primary schooling tend to be higher than the returns to a year of secondary or tertiary schooling. However, this pattern differs by sex. In particular, men appear to have higher returns to primary schooling than women, lower returns to secondary schooling, and comparable returns to tertiary schooling. Thus, it is fair to conclude that people with more education are likely to benefit in material terms (see Table 8).

Table 8. Coefficient of Years of Schooling: Mean Rate of Return Based (based on Mincer-Becker-Chiswick)

			Mean Per Capita (US$)	Years of Schooling	Coefficient (percent)
Per Capita Income Group					
	High Income ($9,266 or more)		23,463	9.4	7.4
	Middle Income ($756-$9,265)		3,025	7.6	10.7
	Low Income ($755 or less)		375	8.2	10.9
Region					
	OECD		24,582	9	7.5
	Europe/Middle East/North Africa		6,299	8.8	7.1

[102] This statement and the facts that follow are drawn from Psachoropoulos and Patrinos 2001. A more selective review focused on causality between schooling and earnings can be found in Card (2001).

	Asia		5,182	8.4	9.9
	Latin America and Caribbean		3,125	8.2	12
	Sub-Saharan Africa		974	7.3	11.7
World			9,160	8.3	9.7
Returns to Education by Gender (percentage)					
			Men		Women
Educational Level					
	Primary		20.1		12.8
	Secondary		13.9		18.4
	Higher		11		10.8
Overall			8.7		9.8
Source: Psacharopoulos and Patrinos, 2002, Tables 3, 4, and 5.					

In the aggregate, however, it appears that investment in education has no (or even a slightly negative) effect on the rate of growth in output per worker.[103] A number of studies in the early 1990s argued that educational investment increased economic growth;[104] but these studies were flawed because they used enrolment (a flow measure) instead of indicators of the stock of educational investment. When appropriate measures are used, the relationship between educational investment and growth disappears.[105] This seeming paradox has three potential explanations: credentialism, stagnant labor demand, and unproductive uses of labor.

The first possibility is that education has no impact on an individual's productivity, but rather acts as a credential or social screen for access to privileged employment. However, this argument is refuted in studies that demonstrate schooling does impart cognitive skills that are rewarded in the labor market. For example, when test scores or other cognitive measures are introduced into earnings regressions, they are generally significant. In these same regressions, variables measuring the years of schooling may be insignificant.[106] Further evidence that schooling imparts real increases in productivity come from studies of incomes earned by the self-employed, for whom credentials cannot be an explanatory factor.[107] A detailed review of returns to education concluded that at least 90 percent of these estimates are, in fact, associated with measurable changes in skills.[108]

[103] Pritchett, 2001
[104] Barro, 1991; Levine and Renelt, 1992
[105] This discussion draws heavily on Pritchett, 2001. Other studies that confirm the lack of a relationship between education and growth include: Benhabib & Spiegel 1994; Spiegel (1994); Lau, Jamison and Louat, 1991; and Jovanovic, Lack and Lavy (1992).
[106] Glewwe, 2002
[107] Jollife, 1998
[108] Card, 2001

A second explanation is that without complementary factors of production (e.g. technology, capital), demand for labor may stagnate. Studies of agriculture demonstrate that returns to schooling are greater where technological progress is present.[109] A rough consideration of the contrast between Africa, where little technological progress has occurred, and Asia, where the "Green Revolution" has increased labor productivity, suggests that education alone cannot promote society-wide economic growth.[110] Rather, complementary factors to realize that educational potential are probably necessary.

Further evidence for the impact of complementary factors comes from studies regarding growing wage inequalities. Differences between the wages of skilled and unskilled workers have been growing over the last few decades. Of the different possible explanations, a consensus is emerging that technological advances have increased the demand for skilled labor relative to unskilled labor. Autor, Levy and Murnane (2002) demonstrate how computerization in the United States substitutes for relatively unskilled routine work but complements and increases the productivity and income of skilled problem-solving work. Sakellariou and Patrinos (2003) find a similar pattern in Vietnam.

A final explanation is that education improves skills, but that more skilled individuals are employed in unproductive activities. Few empirical studies are available to evaluate this hypothesis but its plausibility has been raised by several researchers.[111] In countries where rent-seeking behaviors are more remunerative than productive endeavors, people have incentives to invest in skills that allow them to appropriate income rather than to invest in skills that increase production. One cross-country analysis assessed whether different kinds of higher schooling were associated with growth. They found that countries that graduated larger shares of engineering students (presumably intending to work in more productive activities) experience higher growth than countries with larger shares of graduating lawyers (presumably entering careers that do more to redistribute wealth than to generate it).

A good economy increases the demand for education. Creating a supportive economic environment is not only important for education to be able to contribute to economic growth. It is also important for attaining universal primary enrollment. This can work from either the supply or the demand side. In terms of supply, stagnant economies simply have fewer resources available to invest in children's education. The contrast between Latin America and East Asia is instructive. In 1960, educational attainment in the two regions was comparable and Latin America was, on average, somewhat wealthier. Today, the two regions spend similar shares of GDP on education – but East Asia's rapid growth during the intervening decades means that this share comes out of a larger pie. Consequently, for the same share of national income, East Asian countries can now invest substantially more than Latin American countries.

[109] Schultz, 1975 - cited in Pritchett, 2001
[110] Foster & Rosenzweig, 1996; Glewwe and Jacoby, 2000; Pritchett 2001
[111] North, 1990; Murphy, Schleifer and Vishny, 1991; Pritchett 2001

On the demand side, the returns to education are lower in slow-growing economies, thereby blunting incentives to send children to school. One of the explanations for declining or stagnating enrolment ratios in Sub-Saharan Africa in the 1980s is that there were fewer jobs for graduates in both the private and public sectors. Consequently, private returns to education fell, leading to reduced incentives to stay in school.[112] In Latin America, returns to primary schooling tend to be low relative to tertiary schooling. Consequently, the incentive to progress through primary school is low except for those who expect to be able to go on to university. This contributes to the polarized distribution of education and income in that region.[113]

The relationship between economic growth and progress in education is not a simple one. While growth can increase the returns to education and thereby create incentives for children to stay in school, it also raises the opportunity cost of schooling. For example, rapid growth and rising returns to education in Vietnam in the 1980s was accompanied by *falling* secondary enrolment rates; presumably as youths entered a more dynamic labor market. Yet, in the following decade, secondary enrolment rates increased substantially, and most of this increase can be attributed to increases in family wealth.[114]

This relationship between wealth and enrolment is one mechanism that has been successfully exploited by public policy. Recently, countries such as Mexico, Nicaragua, Brazil, and Bangladesh have adopted programs that give families stipends conditional on their children attending school. This raises the demand for education and, where supply is available, is associated with higher enrollments.[115] A study of the program in Bangladesh suggests that child labor may not be a major impediment to schooling since the rise in enrolment associated with the incentive program was accompanied by only a small decline in child labor.[116]

Education and women's empowerment. It is not only the economic growth benefits that are affected by the policy context. Around the world, increased education is associated with the empowerment of women. Educated women become more effective agents, able to improve both their own well-being and their family's welfare. They are better equipped to extract the most benefit from available services and existing opportunities, and to generate alternative opportunities, roles and support structures.

These empowering effects of women's education are manifested in a variety of ways, including increased income-earning potential, ability to bargain for resources within the household, decision-making autonomy, control over their own fertility, and participation in public life.

[112] Mehrotra & Vandemoortele, 1997
[113] IDB, 1998; Lopez-Acevedo 2001; Bloom et al 2001
[114] Glewwe and Jacoby, 2000
[115] Morley and Coady, 2003
[116] Ravallion and Woodon 2000?

Any such impacts, however, are highly dependent on the context. They are strongly conditioned by a number of factors such as level of economic development, depth of the labor market and, in particular, and degree of gender stratification in the prevailing setting. The impact of women's education is greater in settings that are already relatively more egalitarian. Under such conditions, even modestly educated women are more likely to participate in important family decisions, to work in non-farm occupations and to control economic resources.

In areas that are more gender-stratified, where women are far more likely than men to be denied access to resources and prevented from exercising their own autonomy, education alone will not necessarily be transformative in the absence of any other normative shifts and power relations. In such settings, it takes more education to reach thresholds of change.

Consider fertility as an example. Increases in women's education are associated with declines in fertility around the globe. But how much education is needed to achieve an effect? A review of 59 studies from many different countries found that the levels of women's education associated with a 10 percent decline in the fertility rate vary with the degree of gender stratification. In the most inegalitarian settings (which are in Sub-Saharan Africa and South Asia), in three out of four cases (16 out of 22) a 10 percent decline in fertility is attained only among women with some secondary education, or not at all. In moderately egalitarian settings, a 10 percent decline is attained by women with some primary schooling in half the cases (8 of 16). And in the most egalitarian settings – in Latin America – a 10 percent decline is attained by women with some primary school in almost three in five cases (12 out of 21).[117]

Thus, the impact of women's education is a result of many factors. Absent a change in the context of gender stratification, education alone cannot be expected to destroy barriers to women's full participation in economic, social, and political life. Women's education interacts with many other factors, which also need to be confronted.

[Section to be added on the relationship between education and other sectors, particularly health, and water and sanitation.]

[117]Jejeebhoy, 1996, p. 5.

Box 8. SPECIAL SECTION ON HIV/AIDS

This is a placeholder – work required to demonstrate impact of AIDS on education systems, and to highlight how education affects AIDS prevention efforts. Use Bruns et al, page 77, on incremental costs of AIDS

The AIDS pandemic impedes progress toward achievement of better educational outcomes, and economic growth, in several distinct ways, according to an analysis by Hamoudi and Birdsall (2002):

- First, in the supply of educational services: The deaths of large numbers of adults, including hundreds of thousands of teachers, increases Africa's high fiscal burden of teacher salaries and/or will induce governments in the region to reduce the starting qualifications of teachers to maintain even the same inadequate numbers as are presently in the education system. [**insert numbers re: loss of teachers**]

- Second, in the demand for education: Lowered life expectancies reduce the lifetime private returns to education, making investment in schooling appear less attractive to households. An analysis of Demographic and Health Survey data found that when life expectancy increases by 10 years, schooling attainment increase by 0.3-0.6 years; if life expectancy were to decrease by 20 years – as has been the case in countries most affected by the epidemic to date – the reduction in life expectancy might be expected to reduce average schooling of young adults to 1-3 years from the current 2-4 years.

- Third, in the translation of education into economic growth through an effect on both human and physical capital: In many countries the loss of a large share of the skilled work force may reduce the returns to skill among survivors, thus reducing the contribution of education to overall growth. Over the medium term, as the epidemic has a negative effect on domestic savings and foreign investment, it will lead to the erosion of physical capital stocks in the most severely affected countries. This, too, will impede the translation of education into economic growth.

These messages have specific implications for what the international community could and should do to foster progress toward universal primary education and gender parity. They also have implications for potential actions that could be taken by developing country governments to move toward universal primary education and gender parity by 2015. The linkage between messages and strategic priorities is summarized in Table 9 and discussed, in a slightly different order than they appear in the table, in the sections that follow.

None of the priorities individually is a radical departure from what has been suggested elsewhere. However, together we believe that the actions recommended constitute key levers not just for the expansion of educational opportunities, but for broad transformation in the level and type of education available to future generations. Moving

beyond a vision of every school age child starting first grade, it is possible to imagine a future in which:

- The essential role of mothers in valuing and ensuring the education of their children is not only recognized, but is used to its full potential.

- Society invests enough, and for long enough, in the education of its children so that their future is bright. Into the teenage years, both boys and girls have the chance to learn valuable life and work skills.

- Parents are seen as the central stakeholders in the education system, and are provided with honest and complete information about their local school's performance and resources. Policymakers and education managers respond to parents' demands for more and better educational opportunities.

- Girls in settings where gender discrimination runs deep, and children from poor and otherwise marginalized groups in all countries, benefit disproportionately from the actions of the state in providing convenient, safe, and high quality schooling.

- The links between what is taught and what is demanded in the labor market are strong. Children and parents know that economic policy making will reward, rather than undermine, investments in education.

- Donors and poor countries make agreements about what is to be done, and how much money is to be made available – and each side lives up to the bargain.

Table 9. Strategic Priorities Linked to Messages		
Task Force Message	**Implications for Donors/Technical Agencies**	**Implications for Country Policymakers**
Mothers matter most. Sustained progress toward universal primary education requires actions to improve the status of girls and women.	As part of long-term strategy, prioritize investments in girls' education.	
A little education isn't enough. Because the benefits of education endure only after a critical level of schooling has been attained, providing educational opportunities for adolescents – and particularly adolescent girls – is essential.	Maintain effective investments in education from primary level to basic level. Monitor availability and use of educational opportunities for adolescents.	Develop specific strategies to reach adolescents, and particularly adolescent girls. This may include nonformal education.
Parents need to know. Improving local, national and international accountability through information generation and sharing is a fundamental part of better education systems.	Provide support for local accountability mechanisms. Provide additional financial and institutional support for improvement of data systems.	Create/support local accountability mechanisms that employ international standards wherever possible. Disseminate monitoring data to all stakeholders, including parents.
More money, better spent. Significant Additional Resources Are Critical, But Not Sufficient, to Reach Universal Basic Education	Create compact, and fulfill financial and other commitments in a timely manner. Participate in accountability mechanisms (OECD/DAC – donor harmonization efforts)	Create compact, and fulfill commitments in a timely manner.
Focus on the hardest-to-reach. Reforms and interventions aimed at "all children" will leave out girls and the poorest. Specific actions that take into account the needs of marginalized groups are needed.	Expand investments in interventions aimed at specific marginalized populations. Support evaluation of the effectiveness of reforms and education sector interventions.	
Think holistically. For education to reach its potential to contribute to economic growth, it needs to be accompanied by sound, broad-based economic reform.	Critically examine and adjust trade, intellectual property and other policies that affect participation of poor countries in global economy.	Design economic policies to be coherent with and supportive of universal education objectives.

VI. WHAT THE DONORS SHOULD DO

In the discussion above we have outlined key messages for all actors – local and national governments, donors, the international policy and technical community, parents, and so on. In the end whether the MDG that all children should complete primary education is achieved is mostly in the hands of policymakers in the developing countries. It is public policy and spending decisions that will reflect whether our messages -- that mothers matter most, that parents in those countries have a right to know, that primary education alone is not enough, that money needs to be spent well, that the poorest children are the hardest to reach, and that non-education policies affect children's success in school – are transformed into strategies and policies that make the goal more likely to be achieved.

At the same time, the Task Force believes that all the effort and policy change at the country level will not alone be enough. For the poorest countries in particular, that are most at risk of falling short on this and other goals, the input, influence and sustained commitment of the donor community is critical. We will therefore close the report with recommendations directed to the donors. These are still being considered by Task Force members.

[Recommendations to be re-worked – the version below does not represent a consensus position on the part of all Task Force members.]

Overall Recommendation. Donors should engage as a group in a meaningful compact with national governments

The idea of an international compact, on education as on a number of other development goals, emerges from the Monterrey Financing for Development Conference. It affirms that donor assistance is most effective when it empowers those who are committed to taking responsibility for addressing their own challenges. Compacts call for development support from the rich countries in exchange for increased accountability for results on the part of the developing countries. Greater transparency is required from all partners.

Through a compact, "both developed and developing countries commit to a common goal, and provide each other with mutual confidence that each will live up to their side of the bargain."[118] In the absence of a compact, that mutual confidence breaks down.

To the degree that donor nations are skeptical of poor nations' capacity or willingness to use aid effectively for its stated purpose, they will be less forthcoming with assistance. Likewise, when poor countries cannot be confident that donor financing, once committed, will actually materialize, they cannot commit to the upfront investments and the medium

[118] This quote, along with much of the text in this section is taken directly from a background paper by Sperling, 2003

term strategies toward reform and in addition they will be less able to manage what are usually politically controversial changes in education systems.

Compacts—increasingly the model for major development initiatives, from the HIPC debt relief initiative, to the Global Fund for AIDS, TB and Malaria, to the newly proposed Millennium Challenge Account—are meant to address past shortcomings on both donor and recipient sides, and in the structure of the relationship between them (see text box).

The goal of the ideal compact would be to provide clarity and confidence to all parties involved, which could empower poor countries already committed to serious national reforms and to provide strong incentives for countries that are not quite there.

In the education sector, the framework for such a compact has been developed. The Task Force recommended building on that framework, strengthening and reforming it in specific ways. Each of the recommendations below pertains to the strengthening of the Fast-Track Initiative.

Recommendation 1: Donors should commit publicly to supporting a dedicated facility with a starting balance of at least $1 billion, which would be drawn down and replenished as it is used to fund the credible education sector plans developed under the FTI mechanism. The facility could be a Trust Fund held at the World Bank, with annual lump-sum disbursements from any single donor to any particular country contingent on that donor's agreement. [Note that the optimal institutional arrangements for such a fund are subject to debate.]

Recommendation 2. The Fund should cover basic (not only primary) education in countries that qualify, if recipient countries request such funds, with the objective of keeping adolescents in school and increasing the likelihood that parents and children will be motivated to complete primary school. The evidence outlined above suggests that it is impossible to achieve universal primary school completion in societies where there is little hope for poor children to go on to post-primary education. Moreover, exclusive emphasis on primary schooling – and particularly enrolment in primary school – by donors (and developing country governments) will curtail the true benefits of education, which are attained only after at least five years of education, and in many cases, only after seven to nine years. Focusing on the early primary school years also will fail to address the needs of one of the segments of the population whose life prospects have broad implications for the health, welfare and prosperity of the next generation – namely, adolescent girls.

Expanding effective investments at the post-primary level, embracing the EFA notion of "basic education," is fully consistent with the ambition of achieving universal primary education. Signaling to parents that there are opportunities for children to continue in

school, and that the investments in education will have labor market (and other) pay-offs, is essential to creating and maintaining demand for primary education.

Investments at the post-primary level will vary by current country conditions, ranging from creation of post-primary school spaces, in countries that have had a tradition of extreme rationing at that level, to demand-side incentives such as scholarships in countries where specific demand-side constraints are preventing children's participation at older ages.

Recommendation 3: Strong monitoring of progress in implementing changes and improving education system performance. Individual donors will no doubt establish their own criteria for country eligibility for FTI disbursements that they approve (no doubt based in part on the guidelines already amply discussed). The Task Force recommends to all donors including as a criterion that the recipient country has begun implementing a system providing and actively publicizing to all parents (and indeed all citizens) fully transparent information about the total and per child level of public education spending community by community and ideally within each publicly managed school as well.

[Insert ideas re: basic information that every parent should have.]

To assist countries to develop the information that parents and communities need, the international community should take certain steps. At the international level, UNESCO's UIS has a plan for expanding the range of indicators of education system performance, and for strengthening the capacity of statistical agencies within developing countries to collect and analyze data of adequate quality for decision making. These require both human and material resources to implement. *[More to be included here on specific initiatives that the TF believes are essential to support – possibly the Literacy Assessment and Monitoring Programme, and studies of attainment.]*

Recommendation 4: Strong monitoring of donor funding and practices. Donors should commit to a common framework of transparent annual monitoring and reporting of each other's practices. This can be done through the FTI, in the case of countries included in the initiative, and through the OECD's DAC more broadly.

Recommendation 5. In addition to FTI funding on an annual basis for the programs of eligible countries, donors should take immediate steps to provide funding to any country for cash or other transfers to poor households contingent on children's attendance at school. These programs would ideally be developed and managed by governments, but where that is not immediately possible, could be developed and managed by donors as long as governments agreed.

The cost of conditional cash transfers that would reach every household with a child that is not now in school would be on the order of ____. *(See Box ** to be added).* We

recognize that these transfers are likely to work best in situations where the school infrastructure already exists. At the same time, the experience of countries in Africa with rapidly expanding enrollment following abolition of user fees suggests that a change in the "price" of schooling for households can be the first step in informing the public that basic education is a legitimate national goal, and can help catalyze the demand for schooling which would make governments more accountable for its supply.

In addition to conditional cash transfers, two other interventions that ought to be eligible for FTI funding in any country are:

- School feeding programs, particularly where under-nutrition and food security issues are prevalent. (This is the case for much of Sub Saharan Africa and South Asia.)

- Girls' scholarship programs, particularly where discrimination against girls predominates (either at a national or more localized level) and/or the opportunity cost of girls' participation in post-primary education is a significant demand-side constraint. (This is the case in many parts of South Asia.)

In poor countries support from donors will be required to implement and evaluate such interventions. In middle-income countries, however, such interventions can – and probably should – be undertaken with national funding.

Recommendation 6: Genuine evaluation to learn what works. Given the volume of national and donor resources devoted to education, there is an urgent need to better understand how well specific interventions and reforms work to increase enrollment, retention and learning. This can only be done if those who are responsible for setting spending priorities insist on a sound evidence base for that decision-making, and fund the generation and analysis of relevant data. Several recent examples (including the Progresa/Oportunidades program in Mexico, small-scale school health interventions, and others) attest to the feasibility and potential for policy impact of rigorous evaluation. We therefore recommend that a minimum of 5 percent of the total financial resources devoted to basic education be applied to evaluation programs that use sound methodologies, and guarantee dissemination of findings, whether they are favorable or not.

One approach to the chronic challenge of evaluation of development programs, in education as in other sectors, is the creation of an independent facility for funding and bringing visibility to the results of rigorous impact evaluation. This facility, which potentially would be supported by both foundations and donor governments, would contribute to the "global public good" of knowledge by making funding available for the design and execution of evaluations for a subset of donor-funded projects. An independent, earmarked source of funds could eliminate or reduce the tension between implementation and evaluation, which has hampered evaluation initiatives within the

donor agencies themselves. In addition, an independent facility would have the ability to disseminate evaluation findings and make available evaluation data, in a way that internal evaluation units in ways that development agencies are unlikely or unable to do.

VII. CALL TO ACTION

The world's leaders have made a commitment to move toward providing a primary education for every child by 2015. With more than 100 million children out of school at present, the aim of making up so much lost ground in the next 12 years is an heroic ambition, whose realization will require something quite different than "more of the same."

If the strategy taken by donors and developing country governments is to expand the existing education systems as fast as possible, by providing more financial resources, then history strongly suggests that the countries with relatively low levels of primary school enrolment and completion today will be very much in the same situation in 12 years, ready for the next round of international goal-setting. If, on the other hand, the global community takes on this challenge as an opportunity to take a new, creative and transformative approach to thinking about both education and the relationship between donors and poor countries, there is a chance of a very profound success – not just within education, but much broader social and economic outcomes.

We have suggested in this paper several potential levers for achieving education system transformation (rather than expansion *per se*). There may well be others – better ones – that we will learn about through systematic consultation with expert groups, civil society representatives, policy makers and other stakeholders. The point is not so much to define a closed and universal list – all genuine solutions must come from locally defined processes. Rather, the point is to be clear about the need to identify specific actions that induce a fundamental reorientation in failing education systems.

ANNEXES

1. SUCCESSES

[attached as separate file]

2. DATA ISSUES

[attached as separate file]

3. MAJOR INITIATIVES AND ACTORS IN PRIMARY EDUCATION AND GIRLS' EDUCATION

[only in PowerPoint version currently]

Bibliography of References Cited [to be supplemented with some additional materials not yet included**]**

Ahmed, A.U. and K. Billah. 1994. "Food for Education program in Bangladesh: An Early Assessment", International Food Policy Research Institute, Bangladesh Food Policy Project.

Ainsworth, M., K. Beegle, and A. Nyamete. 1996. "The Impact of Women's Schooling on Fertility and Contraceptive Use: A Study of Fourteen Sub-Saharan African Countries" World Bank Economic Review 10 (1): 85-122.

Alderman, Harold and Elizabeth M. King. 1998. "Gender Differences in parental Investment in Education" Structural change and Economic Dynamics 9.

Al-Samarrai, Samer. 2002. "Achieving Education for All: How Much Does Money Matter?" IDS Working Paper 175. Sussex: Institute of Development Studies.
Anzar, U. 1999. "Education Reforms in Balochistan, 1990-1998: A Case Study in Improving Management and Gender Equality in Primary Education." Education Series. World Bank.

Autor, D. H., F. Levy, and R. Murnane. 2002. "The Skill Content of Recent Technological Change: An Empirical Exploration", Working Paper 01-22, MIT Department of Economics Working Paper Series, Revised Sept. 2002, Cambridge, MA.

Babu, C. and J.A.Hallam. 1989. "Socioeconomic Impacts of School Feeding Programs: Empirical Evidence from a South Indian Village", *Food Policy*, pp. 58-66.

Barro, R. 1991. "Economic Growth in a Cross Section of Countries," *Quarterly Journal of Economics*, 106(1), pp. 407-443.

Behrman, Jere R., Andrew D. Foster, Mark R. Rosenzweig, Prem Vashishtha. 1999. "Women's Schooling, Home Teaching, and Economic Growth" *Journal of Political Economy, volume 107, no. 4.*

Benhabib, J. and M. Spiegel. 1994. "The role of human capital in development: Evidence from cross national aggregate data", *Journal of Monetary Economics*.

Bertrand, Doris. 2003. "Achieving The UPE Goal of the Millennium Declaration: New Challenges for Development Cooperation" Geneva: UN Joint Inspection Unit.

Bhalla, Surjit S., Suraj Saigal and Nabhojit Basu. 2003, "Girls' Education is *It* – Nothing Else Matters (Much)" Oxus Research and Investments, New Delhi, paper prepared for the World Development Report 2003/04.

Blom, A., D. Verner, and L. Holm-Nielsen. 2001. "Education, Earnings, and Inequality in Brazil, 1982-1998: Implications for Education Policy", Working Paper No. 2686, The World Bank: Washington, DC.

Bobonis, Gustavo, Edward Miguel and Charu Sharma. 2002. "Iron Supplementation and Early Childhood Development: A Randomized Evaluation in India" mimeo, University of California, Berkeley.

Bruns, Barbara, Alain Mingat and Ramahatra Rakotomalala. 2003. *Achieving Universal Primary Education by 2015: A Chance for Every Child*. Washington, DC: World Bank.

Card, D. 2001. "Estimating the Return to Schooling: Progress on Some Persistent Econometric Problems". *Econometrica* 69(5):1127-1160.

Coalition for Health and Education Rights, 2002. "User Fees: The Right to Education and Health Denied" Policy Brief. New York.

Clemens (2004). "The Long Walk to School: Development Goals in Historical Context." United Nations Millennium Project Task Force on Education and Gender Equality Commissioned Paper.

Corrales, Javier. 1999. "The Politics of Education Reforms: Bolstering the Supply and Demand; Overcoming Institutional Blocks." Education Reform and Management Series, vol. II, no. 1. Washington, DC: World Bank.

Craig, H., Kraft, R., and Plessis, J. 1998. "Teacher Development : Making an Impact". USAID: Advancing Basic Education and Literacy Project. World Bank. Human Development Network. Available at: www.worldbank.org/education.

Delamonica, E., S. Mehrotra, and J. Vandemoortele. 2001. "Is EFA Affordable? Estimating the Global Minimum cost of 'Education for All'", Innocenti Working Paper No. 87. Florence: UNICEF Innocenti Research Centre.

Delannoy, Francoise. 2000. "Education Reforms in Chile, 1980-98: A Lesson in Pragmatism" Education Reform and Management Series, vol. 1, no. 1. Washington, DC: World Bank.

Demographic and Health Survey—Egypt. 1995. Calverton, MD: ORC Macro International Inc.

Devarajan, S., M. J. Miller, and E. V. Swanson. 2002. "Goals for Development: History, Prospects and Costs", photocopy April, 2002 World Bank.

De Walque, Damien. 2002. "How Does Educational Attainment Affect the Risk of Being Infected by HIV/AIDS? Evidence from a General Population Cohort in Rural Uganda." University of Chicago.

Duflo, Esther. 2001. "Schooling and Labor market Consequences of School Construction in Indonesia: Evidence from an Unusual Policy Experiment" *The American Economic Review* 91:4.

Ellis, Simon. 2003. "Achieving the Millennium Development Goals 2 and 3: Measuring the Gap and Gaps in Measurement of Education." Montreal: UNESCO Institute for Statistics.

Filmer, D. and L. Pritchett. 1998. "The Effect of Household Wealth on Educational Attainment Around the World: Demographic and Health Survey Evidence," Mimeo.

Filmer, Deon. 1999. "The Structure of Social Disparities in Education: Gender and Wealth." Policy Research Report on Gender and Development Working Paper Series No. 5. Washington, DC: World Bank.

Forum for African Women Educationalists. 2001. "Girls' Education and Poverty Eradication: FAWE's Response." Presentation to the Third United Nations Conference on The Least Developed Countries, Brussels, Belgium.

Foster, A.D., and M.R. Rosenzweig. 1996. "Technological change and Human Capital Returns and Investments: Evidence from the Green Revolution." *American Economic Review* 86(4):931-53.

Gasperini, L.2000. "The Cuban Education System: Lessons and Dilemmas". *Education Reform and Management Publication Series.* Vol 1. No. 5. Human Development Network. World Bank.

Gertler, Paul and Paul Glewwe. 1992. "The Willingness to Pay for Education for Daughters in Contrast to Sons: Evidence from Rural Peru." *The World Bank Economic Review* 6 (1): 17-188.

Glewwe, P. "Schools and Skills in Developing Countries: Education Policies and Socioeconomic Outcomes", *Journal of Economic Literature*, vol. 40. June), pp. 436-482.

Glewwe, P. and H.G. Jacoby. 2000. "Economic Growth and the Demand for Education: Is There a Wealth Effect?", photocopy dated September 2000.

Glewwe, Paul and Michael Kremer. 2003. "Schools, Teachers, and Education Outcomes in Developing Countries" H*andbook on the Economics of Education.* Forthcoming .

Herz, Barbara and Anthony R. Measham, 1987. *Safe Motherhood: Proposals for Action*. World Bank Discussion Paper No. 9. Washington, DC: World Bank.

Herz, Barbara and Gene Sperling. 2003. "What Works in Girls Education."

Herz, Barbara, K. Subbarao, Masooma Habib and Laura Raney. 1995. "Letting Girls learn: Promising Approaches in Primary and Secondary Education" World Bank Discussion Papers. Washington, DC: World Bank.

Hill, M. Anne and Elizabeth King. 1995. "Women's Education and Economic Well-Being," *Feminist Economics* 1 (2).

Inter-American Development Bank, 1998. *Facing Up to Inequality in Latin America*. Washington DC: Inter-American Development Bank.

International Food Policy Research Institute. 2001. "Food for Education: Feeding Minds Reduces Poverty," IFPRI: Washington, DC.

Jejeebhoy, Shireen J. 1996. *Women's Education, Autonomy and Reproductive Behavior: Assessing What We Have Learned*. Honolulu, Hawaii: East-West Center.

Joint Ministerial Committee of the Boards of Governors of the Bank and the Fund on the Transfer of Real Resources to Developing Countries (2003). "Progress Report and Critical Next Steps in Scaling Up: Education for All, Health, HIV/AIDS, Water and Sanitation." World Bank and International Monetary Fund.

Jollife, D. 1998. "Skills, Schooling, and Household Income in Ghana." *World Bank Economic Review* 12(1): 81-108.

Joyanavich, B., S. Lack and V. Lavy. 1992. "Growth and Human Capital's Role as an Investment in Cost Reduction." New York University, New York. Mimeo.

Kambhapati, Uma S. and Sarmistha Pal. 2001. "Role of parental literacy in explaining gender difference: Evidence from child schooling in India" *European Journal of Development Research,* 13 (2): 97-119.

King, Elizabeth and Rosemary Bellew. 1991. "Gains in the Education of Peruvian Women, 1940-1980." In Herz and Khandkher, eds. *Women's Work, Education and Family Welfare in Peru*. World Bank Discussion Paper 116.

King, Elizabeth and Lee A. Lillard. 1987. "Education Policy and Schooling Attainment in Malaysia and the Philippines." *Economics and Education Review* 6(2): 167-181.

Klasen, Stephen. 1999. "Does Gender Inequality Reduce Growth and Development? Evidence from Cross-Country Regressions," *Policy Research Report on Gender and Development* Working Paper No. 7. Washington, DC: World Bank.

Lau, L., D. Jamison and L. Louat .1991. "Impact of Education by Region." World Bank, Washington, D.C. Mimeo.

Lavy, Victor. 1996 "School Supply Constraints and Children's Educational Outcomes in Rural Ghana." *Journal of Development Economics* 51 (2).

Levine, R. and D. Renelt. 1992. "A sensitivity analysis of cross country growth regressions," *American Economic Review*, 82(4), pp. 942-963.

Lillard, LA and RJ Willis. 1994 "Intergenerational Education Mobility" *Journal of Human Resources* 29(4).

Lockheed, M.E. and A. Verspoor. 1991. *Improving Primary Education in Developing Countries*. Washington, DC: World Bank.

Lopez-Acevedo, G. 2001. "Evolution of Earnings and Rates of Return to Education in Mexico", Working Paper No. 2691, The World Bank: Washington, DC.

Mehrotra, S. and J. Vandemoortle. 1997. UNICEF Staff Working Papers, No. EVL-97-006. UNICEF: New York, NY.

Lloyd, Cynthia B. and Barbara Mensch. 1999. "Implication of Formal Schooling for Girls' Transitions to Adulthood in Developing Countries" in Caroline Bledsoe, John Casterline, Jennifer Johnson-Kuhn and John Haaga, eds., *Critical Perspectives on Schooling and Fertility in the Developing World*. Washington, DC: National Academy Press.

MAYA. 2002. *Annual Report.* Available at: www.mayaindia.org

Menezes, R. 2003. "Making the UN Millennium Declaration Count for Latin America: The Case for Incorporating Race and Ethnicity into the Millennium Development Goals." Working Paper. Inter-Agency Consultation on Race in Latin America.

Miguel, E. and M. Kremer. 2003. "Worms: Identifying Impacts on Education and Health in the Presence of Treatment Externalities", mimeo.

Morley, S. and D. Coady. 2003. *From Social Assistance to Social Development: Targeted Education Subsidies in Developing Countries*. Washington, DC: Center for Global Development / International Food Policy Research Institute.

Moulton, Jeanne. 2001. *Paradigm Lost? The Implementation of Basic Education Reforms in Sub-Saharan Africa*. Washington, DC: USAID.

Murphy, K. A. Shleifer and R. Vishny. 1991. "The allocation of talent: Implications for growth," *Quarterly Journal of Economics*, 106(2), pp. 503-530.

North, D. 1990. *Institutions, Institutional Change and Economic Performance*. Cambridge: Cambridge University Press.

Oxfam. 2001. "Education Report" Washington, DC.

Parker, Susan Wendy and Carla Pederzini 2000 "Gender Differences in Education in Mexico" World Bank Departmental Working Paper. Washington, DC: World Bank.

Perris, L. 1998. "Implementing Education Reforms in New Zealand: 1987-1997." *Education Reform and Management Series.* Vol 1. No. 1. World Bank.

Pigozzi, M.J . 2003. "Quality education—addressing the MDGs and goal #6 of the Dakar Framework for Action from a gender perspective." Mini-paper prepared for the United Nations Millennium Project Task Force on Education and Gender Equality.

Population Reference Bureau, 2001. "Abandoning Female Genital Cutting: Prevalence, Attitudes, and Efforts to End the Practice." Washington, DC.

Pritchett, Lant 2002. "When Will They Ever Learn? Why All Governments Produce Schooling". Working Paper. Harvard Kennedy School of Government.

Pritchett, Lant. 2001. "Where Has All the Education Gone?" *The World Bank Economic Review*, 15(3), pp. 367-391.

Psacharoulos, George and Harry Anthony Patrinos, 2002. "Returns to Investment in Education: A Further Update," World Bank Policy Research Working Paper 2881. Washington, DC: World Bank.

Ravallion, M. and Q. Wodon. 2000. "Does Child Labor Displace Schooling? Evidence on Behavioral Responses to an enrolment Subsidy", World Bank working Paper???

Reinikka, Ritvs; Svensson, Jakob. 2003. "The Power of Information Evidence: Evidence From a Newspaper Campaign to Reduce Capture," World Bank.

Report of the Development Committee Meeting, September 22, 2003.

Ridker, Ronald, ed. 1997 "Determinant of Educational Achievement and Attainment in Africa: Findings form Nine Case Studies" SD Publication Series, Technical paper No. 62, DC: USAID, Office of Sustainable Dev, Bureau for Africa.

Rugh, Andrea. 2000. *Starting Now: Strategies for Helping Girls Complete Primary*. Academy for Educational Development, SAGE Project. Washington, DC: Academy for Educational Development.

Sakellariou, C. N. and H.A. Patrinos. 2003. "Technology, Computers, and Wages: Evidence from a Developing Economy". Working Paper no. 3008. The World Bank: Washington, DC.

Schultz, T. Paul. 2001. "Why Governments Should Invest More to Educate Girls", Center Discussion Paper No. 836, Economic Growth Center, Yale University, September. http://papers.ssrn.com/paper.taf?abstract_id=286592

Schultz, T. Paul, 1993 "Returns to Women's Schooling," in Elizabeth King and M. Anne Hill, eds, *Women's Education in Developing Countries: Barriers, Benefits, and Policy* Baltimore: Johns Hopkins University Press.

Schultz, T.W. 1975. "The value of the Ability to Deal with Disequilibria." *Journal of Economic Literature*, 13(3): 827-846.

Seshadri and Gopaldas, 1989. "Impact of iron Supplementation on Cognitive Function of Pre-School and School-Age Children: The Indian Experience", *Journal of Clinical Nutrition*.

Simeon, D.T. and S.Grantham-McGregor. 1989. "Effects of Missing Breakfast on cognitive Functions of School Children of Different Nutritional Status," *American Journal of Clinical Nutrition*.

Sipahimanlani, Vandana. 1999. "Education in the Rural Indian Household: The Impact of Household and School Characteristics on Gender Differences." Working paper 68. National Council of Applied Economic Research, New Delhi.

Sperling, Gene. 2003. "Donor Reactions to the Education for All Fast-Track Initiative." Paper for the Millennium Project Task Force on Education and Gender Equality.

Spiegel, M. 1994. "Determinants of long-run productivity growth: A selective survey with some new empirical results". Mimeo.

Subbarao, K. and Laura Rainey. 1995. "Social Gains from Female Education." *Economic Development and Cultural Change*, 44 (1).

UNESCO. 2002. *Education for All: Is the World on Track?*. EFA Global Monitoring Report 2002. UNESCO: Paris.

UNESCO. 2003. *Gender and Education for All-the Leap to Equality. EFA Global Monitoring Report 2003/4. UNESCO: Paris.*

UNICEF. 2002. Case Studies on Girls' Education. NY: UNICEF, manuscript.

UNICEF. 2001. "Fourth Consolidated Report to the Government of Norway on the UNICEF African Girls' Education Initiative." NY: UNICEF.

United Nations Population Fund. 2003. *Making 1 Billion Count: Investing in Adolescents' Health and Rights*. NY: United Nations.

Vandemoortle, J. and E. Delmonica, 2000 "Education 'Vaccine" against HIV/AIDS." *Current Issues in Comparative Education* 3(1)

Vasconcelos Saliba, A. 2003. " Have you Heard about the Parana (Brazil) School Report Cards?". Informative Flier.

Vawda, Ayesha Yaqub, Peter Moock, J. Price Gittinger and Harry Anthony Patrinos. 2001. "Economic Analysis of World Bank Projects and Project Outcomes" Policy Research Working Paper 2564. Washington, DC: World Bank.

Vermeersch, C. 2002 "School Meals, Educational Achievement and School Competition: Evidence from a Randomized Evaluation", Harvard University, mimeo.

World Bank .2003. *World Development Report*. 2003- 2004. Washington, DC: World Bank.

World Bank. 2002. "Education for Dynamic Economies: Action Plan to Accelerate Progress towards Education for All" Washington, DC: World Bank.

World Bank. 2001. *Engendering Development*. World Bank Policy Research Report. Washington, DC: World Bank.

World Bank. 1999. "Rajasthan District Primary Education Project" . Project Information Document. www4.worldbank.org/sprojects 05-08-2003

World Bank. 1996. *Improving Basic Education in Pakistan*. Policy 14960-PAK. Washington, DC: World Bank.

World Food Program, 2001. "School Feeding Works for Girls' Education, Rome.

World Food Program, UNESCO, 1999. "End of Term Evaluation of the WFP Country Programme in Pakistan (1994-1998): Technical Report on Education Sector, Paris.

World Health Organization 1998, “Female Genital Mutilation.” Geneva: WHO.

UNESCO/WFP, 2000. “Case Study Mission Report: WFP Project Morocco 2288.04: Promotion of Girls’ Education in Rural Areas”. Paris.

Figure 3. Comparisons among actual primary net enrolment, primary net enrolment trends, and universal primary education goals

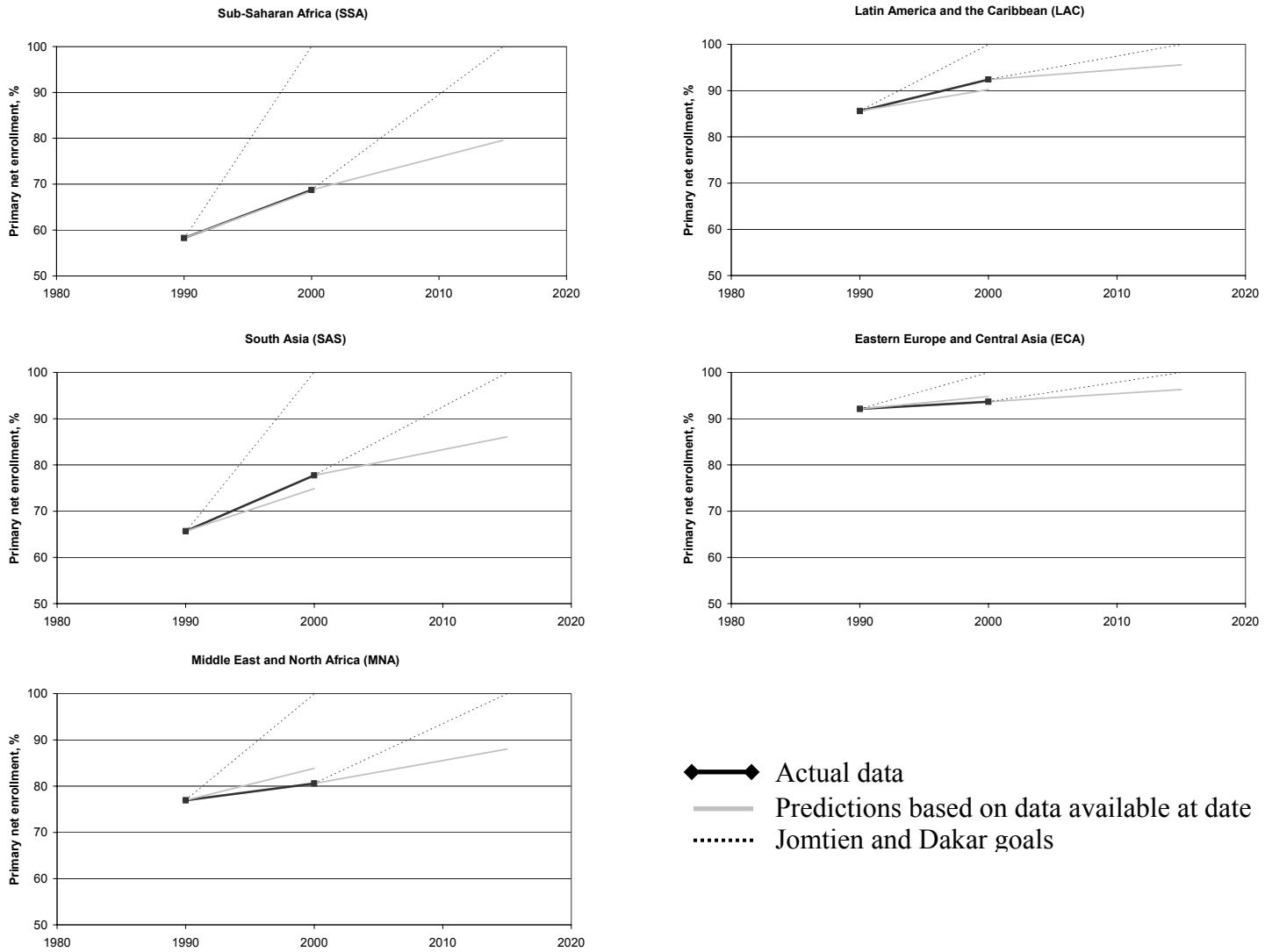
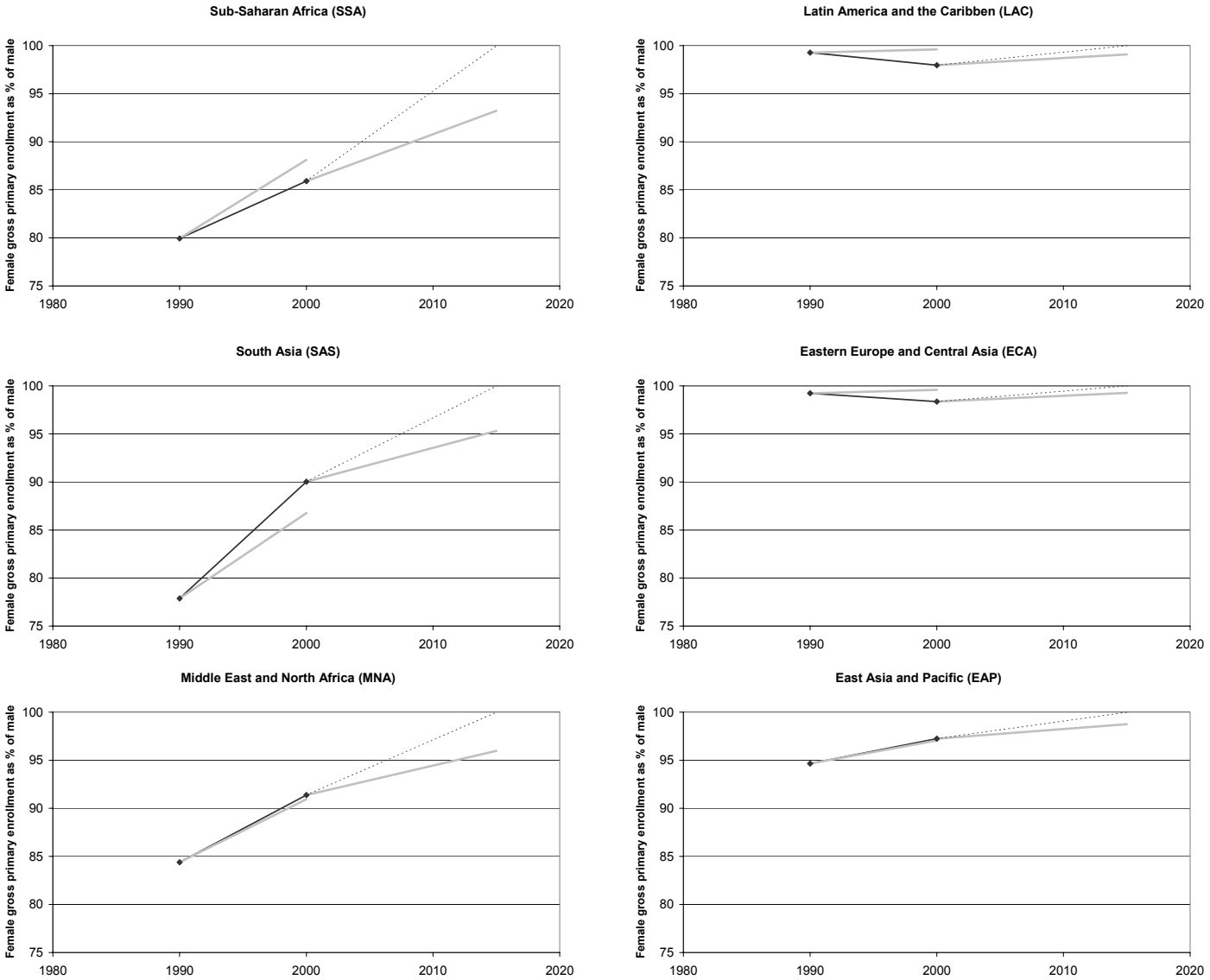


Figure 4. Comparison among actual gender ratio in primary education, predicted gender ratio trends and gender equality goal



Success Stories in Policy Interventions towards High Quality Universal Primary Education

United Nations Millennium Project
Task Force on Education and Gender Equality[1]
Background Paper

Maria Beatriz Orlando [2]

EXECUTIVE SUMMARY

The purpose of this background paper commissioned by the United Nations Millennium Project Task Force on Education and Gender Equality is to provide key information about a wide range of education interventions that are documented as successful by institutions with recognized worldwide expertise on education policy. These interventions have objectives that are in line with the Millennium Development Goals in Education and Gender Equality, which entail: increase enrolment and completion for boys and girls, improve education quality, and improve education equity. The emphasis of the paper is on interventions that are currently under implementation or projects that were implemented during the 1990.The main limitation of this compilation of successful interventions is the lack of systematic impact and cost evaluations.

Section I) Introduction:

The paper is organized according to basic education intervention types, by operating level, following Levine, Birdsall, Ibrahim, and Dayal (2003): education sector reform, school effectiveness, household demand, and student's preparation and health. Considering information limitations, the paper further arrays interventions within each category in three groups: successful interventions (programs that have been rigorously evaluated), promising interventions (identified as best practices even though the evaluation is not rigorous), and interesting interventions (innovative programs that are too new or scarcely documented).

---

[1] The Task Force on Education and Gender Equality is one of the ten Task Forces organized in the context of the United Nations Millennium Project. The Task Force on Education and Gender Equality is co-chaired by Nancy Birdsall, Geeta Rao Gupta, and Amina Ibrahim. The United Nations Millennium Project is a three- year initiative to identify the best strategies for meeting the Millennium Development Goals.

[2] Research Associate at the Center for Global Development. Please send comments to mbeatrizo@yahoo.com . I would like to thank Ruth Levine, Arlene Mitchell, Prarthna Dayal, Sabeen Hassanali, Emiliana Vegas, Noala Skinner, Julie Kennedy, and the staff of Programa de Promocion de la Reforma Educativa en America Latina y el Caribe (PREAL), for their suggestions, comments, and help with information sources. This paper does not represent the views of the Center for Global Development or the Task Force on Education and Gender Equality. I am responsible for all remaining errors.

Section II) Education Sector Reform:

- Education Reforms in Chile
- Balochistan Primary Education Project
- Vouchers in Colombia
- Ethiopian Education Sector Development Program/Basic Education Systems Overhaul
- India District Primary Education Program
- Money Straight to the School , Brazil
- Decentralization in Nicaragua
- Licenses to Operate Schools in Bogota, Colombia

Two successful but opposite approaches coexist in Education Sector Reform. On the one hand, some countries have adopted system-wide top-down reforms that integrate management improvements, decentralization, and finance reform. This approach has been particularly successful in the cases of countries undergoing political transformations (Uganda, for example) or reformers that were able to count on a strong political commitment by the President or the Minister of Education. An appropriate communications strategy, the involvement of different groups as reform agents, and decisive legislative change (when required) are also keys of education reform success. On the other hand some successful bottom-up education reforms have occurred by increasing the flexibility of the overall system to incorporate small or medium –scale local innovations that have high potential for replication and scalability (India Districts Reforms and Balochistan Province Reforms).

Section III) Improving Primary School Effectiveness:

- EDUCO Program
- Chile: School Evaluation and Rewards System
- BRAC Education Program
- Guatemala : Nueva Escuela Unitaria
- MAYA –India: Community Ownership for Better Schools
- Multiphase Program for Equity in Basic Education, Dominican Republic
- Radio Interactive Mathematics for Basic Education
- Teacher training programs (several)
- Community participation (several)
- Multicultural-multilingual and bilingual education (several)
- Application of Information and Communication Technologies to Education (several)
- Programs to Accelerate Learning and Compensatory Programs (several)
- Focusing on Girls (several)

Increasing community participation, especially direct parental involvement in school governance leads to great results. Several effective teacher- training models can be successful depending on the context. However, high impact training programs were a long- term ongoing process and offered teachers a support network. New technologies can be effectively used to enhance school effectiveness or to provide training to teachers.

Section IV) Increasing Household Demand for Basic Education

- Progresa-Oportunidades
- Food for Education
- Red de Proteccion Social –Social Protection Network
- Bolsa Escola
- Household Allowance Program
- Elimination of School Fees in Uganda
- Malawi, School Waivers for Girls
- Child labor programs (several)

These interventions tend to have very significant impact and be very cost effective. Effective targeting is the most important key to success in this type of intervention. Another important policy lesson from these experiences is their efficient and accountable management. Governments implementing these transfers successfully counted on pre-existing institutional capacity to reach remote areas.

Section V) Focusing on Student's Preparation and Health:

- Kenya –Primary School Deworming Program
- Bolivia- Integrated Child Development Project
- Eritrea : Integrated Early Childhood Development
- Kenya: School Meals
- Sesame Street Goes to Egypt
- Mexico- Initial Education Program
- Bosnia and Herzegovina : Schools for Pregnant Women

These interventions can have a high impact on student performance. Successful implementation of health and nutrition programs in schools depends on effective diagnosis, simplicity of treatments, and effective targeting. Successful implementation of early childhood development programs depends at large on the institutional capacity of the health and education system and the provision of maternal health.

VI) Conclusions

- Many successful interventions have integrated approaches combining education reform elements with school effectiveness interventions or household demand interventions with student health and nutrition interventions.
- Most resources from the donor community have been traditionally devoted to finance Education Sector Reforms. Should more international resources flow towards specific programs in the areas of school effectiveness, household demand, and nutrition and health of students?
- The replication and scale-up of these successful programs poses new education system management challenges.

I) INTRODUCTION

The Task Force on Education and Gender Equality identified the need for a survey of recent successful education policy interventions in the developing world, in terms of the targets set by the Millennium Development Goals (MDG). The MDG framework entails significant increases in enrolment and completion in primary education as well as gender parity in education[3]. The main obstacle for the identification of "successful" policy interventions is the lack of systematic impact and cost effectiveness evaluations. The lack of systematic evaluations also introduces a report bias in any survey of education policy interventions because there are more sources of information and policy analysis publications about programs that have been evaluated or studied systematically versus other programs that may have equal or greater potential.

The purpose of this background paper is to provide key information about a wide range of interventions that are documented as successful by institutions with recognized worldwide expertise on education[4]. The emphasis of the paper is on interventions that are currently under implementation or projects that were implemented during the 1990s.

The paper is organized according to basic education intervention types, by operating level, following Levine, Birdsall, Ibrahim, and Dayal (2003): education sector reform (sector wide reforms including changes in education management, provision, and financing), school effectiveness (interventions focusing on direct education inputs to improve learning in the classroom), household demand (reduction or elimination of school fees and direct targeted transfers to help families pay for education), and student's preparation and health. Each intervention type includes programs designed to increase enrolment and completion for boys and girls, improve education quality, or improve education equity. The paper does not include interventions geared towards education provision in emergency situations (displaced children, armed conflicts, or natural disasters)

Considering information limitations, the paper further arrays interventions within each category in three groups :

- Successful Interventions: education programs that have been identified as successful based on a scientific evaluation of their net impact (employing randomly selected "treatment" and "control" groups or rigorous statistical analysis). In addition, education programs that have been identified as best practices, even if partially evaluated, due to their fast/effective achievement of their stated goals.

[3] Levine, Birdsall, Ibrahim, and Dayal (2003). "Achieving Universal Primary Education by 2015". Background Paper for the Millennium Project Task Force.

[4] Main sources of information: The World Bank, United States Agency for International Development, Academy for Educational Development, Inter-American Development Bank, Asian Development Bank, African Development Bank, Basic Education Coalition, UNESCO, UNICEF, Research Triangle Institute, Save the Children, Programa de Promocion de la Reforma Educativa en America Latina y el Caribe (PREAL), Creative Associates, and Care International.

- Promising Interventions: education programs that have been identified as best practices or poster cases by any of the sources due to their good results in terms of equitable basic education. These programs lack systematic impact evaluations and information on their effectiveness.
- Interesting Interventions: education programs that are too new or scarcely documented, but use innovative approaches that may be very informative for education policy discussions.

The paper summarizes the following information (when available) for each successful or promising intervention:

A) Name of the initiative
B) Specific aims and objectives
C) Operating level
D) Geographic focus/context
E) Time period for implementation
F) Outcome or impact information, and/or information from any evaluation
G) Key of success
H) Assessment of quality of information / limitations of the methods and/or data
I) Cost/Cost-effectiveness
J) Funding sources
K) Reference materials and main source(s) of information for summary
L) Potential scalability or replication in different contexts

For interesting policy interventions I present only the name and objectives of the intervention. Each section contains an introduction and a selection of successful, promising, and interesting interventions. The conclusion highlights some common trends on successful initiatives by intervention type and the implications of these trends to the international donor community.

II) EDUCATION SECTOR REFORMS AND BASIC EDUCATION

Education sector reform programs have a long history counting more failures than successes partly due to their complexity, design problems, insufficient financing, lack of institutional and managerial capacity within the system, and distorted labor markets for teachers [5]. It is also the education intervention that has received the largest share of multilateral funding[6]. Traditional education sector reforms focus on curriculum reforms and reforms on education administration. During the last decade, education reforms have included decentralization in provision, management, and financing. Recently,

[5] UNESCO (2002)

[6] World Bank (2001), World Bank (2003). The Annual Reports and Project Pipelines of the Inter-American Development Bank (www.iadb.org) and the Asian Development Bank (www.adb.org) show a high proportion of education projects that focus on education reform.

a few countries have implemented school vouchers at a small scale. School vouchers affect household demand but are included in this section because their main objective is improving education sector management, quality, and cost effectiveness.

2.1- Successful Interventions in Education Sector Reform

- **Education Reforms in Chile, 1990s**[7]

A) Name of the initiatives: Full School Day Initiative (Extension Jornada Escolar).

B) Specific aims and objectives: The market oriented top-down reform of the 1980s (decentralization, universal attendance per capita grants), notably increased efficiency in the education system as well as public and private spending in education. Once a democratic government was in power in 1990, the main objective of education reform was to build on previous successes and address remaining problems such as inequities in education and new problems arising from reforms (teacher's salaries, training, and overall career development). The first democratic administrations started a series of reforms to increase the quality of primary schooling and address inequities of access and quality by income level. As part of the overall reform, the Full School Day Initiative aimed at eliminating double-shift schools by 2002. School hours were increased from 30 to 38 hours in basic education. During the extra hours both the students and teachers were involved in more interactive activities and training. The reform had several components: teacher training and involvement, improved teacher salaries, new infrastructure (about 20,000 new classrooms necessary to guarantee access), curricula reforms, and an improved student achievement evaluation system. During the late 1990s, and currently, new stages of reform had the objective of building on the quality improvements at the school level and improve performance across all dimensions.

C) Operating level: Ministry of Education and municipal education authorities. Municipal education authorities played a central role.

D) Geographic focus/context: Urban and rural. Chile is at a relatively advanced stage of educational development with enrolment ratios similar to those of developed countries. Inequities in access and quality were, and are still, relatively high. In 1992, coverage of basic education in the poorest quintile was around 92% and in the richest quintile was around 99.8%. The reforms were part of the presidential political agenda of the democratic administrations that followed the Pinochet dictatorship (Aylwin, Frei, and Lagos administrations gave continuity to education reform as a national priority).

[7] Education reforms in Chile during the 1990s included several sector wide initiatives that were implemented successfully under the general Education Improvement Programs (Proyectos de Mejoramiento Educativo-PME). The PME provided funds for reforms at the school level. Schools applied for a fund ($3060-$10205, depending on enrolment) to implement an improvement project. (see De Andraca, 2003).In Uruguay , a World Bank project finances full day schools (DeAndraca, 2003).

E) Time period for implementation: Education reforms in Chile have persisted for more than two decades, surviving the transition to democracy and several administrations. There are three well -defined reform cycles:

- Market oriented top-down reform (1980-1990)
- Promoting Equity and Quality through bottom- up reform (early 1990s)
- Providing institutions to support quality improvements (linking bottom-up and top-down reform) (late 1990s and current).

F) Outcome or impact information, and/or information from any evaluation: The Full School Day had been adopted by 50% of government -subsidized schools by 1998. Evaluations of the reform report increases in coverage and average learning outcomes measured by national annual standardized tests. Average learning outcomes increased by 20% between 1990 and 1996 in municipal schools. Outcomes increased by 25% in private-subsidized schools and by 7.5% in private (full tuition) during the same period. Chilean children (grade 3) scored third in a 1998 UNESCO assessment of student outcomes in Latin America and the Caribbean. Average years of schooling have increased for all income groups during the 1990s. However, the gap between the highest and lowest quintiles is still significant in primary education and relatively large in secondary school.

G) Key of success: Continuity and building upon previous successful financial and administrative reforms such as decentralization and per capita grants (a type of voucher system). On the other hand reforms were able to review previous policies and modify them according to the new requirements of society (double shifts were effectively implemented to increase coverage in the 1960s, but in the 1990s coverage is high but quality was suffering). Political commitment to the reforms at the Presidential level (Eduardo Frei called himself "the education President"). High quality in the design of the Full School Day initiative. The communication strategy of the Full School Day initiative suffered some false starts but finally was able to convey the main objective of the reform and generate high expectations in the public. Negotiation with re-organized teacher unions gained support for the reform and the ability to attract human capital to the teaching profession at the cost of increasing salaries and centralizing labor contracts (which was hard on the municipal education authorities). In order to improve quality the recent reforms focused on the school and its production process (education inputs: teacher's training, adequate infrastructure, relevant curricula and activities, and learning measurement). Other education inputs that were enhanced through specific interventions include: school meals, basic health care, and school supplies. Positive discrimination in the grant system improves equity. Redefined public and private roles to drastically increase and optimize investment in education. The program has been implemented in a transparent manner and has contributed to the development of Chile's private school sector.

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports. Evaluations based on national learning achievement data that was generated as a component of the reform. Even though progress is evident during the 1990s it is hard to compare with the

progress during the 1980s reforms. Studies that control for socio-economic characteristics of the students.

I) Cost/Cost-effectiveness: Increasing the flow of resources for education was essential to improve quality. Both public and private investment in education increased during the 1990s. Public spending per pupil in basic education increased by 78.5% between 1990 and 1996. Public and private education spending represented 7% of GDP in 1998, while in 1990 it represented 4.6%. Private spending was 3.1% of GDP in 1998 and only 2% of GDP in 1990.

J) Funding sources: Government of Chile and World Bank.

K) Reference materials and main source(s) of information for summary: Delannoy (2000), PREAL(a) (2002).

L) Potential scalability or replication in different contexts : It would be difficult to replicate the Chilean experience on education reform as a whole. One of the reasons is that it would be extremely hard for a democratic government to implement the efficiency reforms that were dictated during the 1980s. However, many elements of the Full School Day program could be replicated in different contexts (reduce double shifts in school, increase the number of activities in school, improve teachers' training).

- **Balochistan Primary Education , Pakistan**

A) Name of the initiative: Balochistan Primary Education Development Program

B) Specific aims and objectives: Increase access to education for girls. Improve the quality of primary education. The comprehensive reform included: restructuring education management to create a strong base for education reforms and access to girls, improving education quality through teacher training and curriculum reforms, and involving communities in expanding primary schooling for girls.

C) Operating level : Province of Balochistan Education Authorities

D) Geographic focus/context: The reforms took place on mostly the rural areas of Balochistan province, one of the most underdeveloped areas of Pakistan. Geographic implementation barriers were significant since Balochistan has a small population (approximately 6.5 million in 1998 census) scattered in remote rural areas in a vast territory. Most villages do not have paved roads, telephones or electricity. The population is ethnically diverse and four languages are spoken in the region in addition to the official national language Urdu. Reformers also faced the pervasive financial mismanagement within the local public sector.

Pakistan literacy and enrolment rates are very low, especially for women in rural areas. Balochistan province has traditionally registered worse literacy and enrolment rates and worse access for girls than the country's average in both urban and rural areas. Only 10.3 % of the province's population was literate by 1981.

Inequities between boys and girls were dramatic in Balochistan. Throughout the 80s literacy rates for *women* in Balochistan's *rural* areas were between 1%-2%. Girls' enrolment in Balochistan during 1990 was only 25.4% the

enrolment of boys. Addressing inequities towards girls' education was a daunting task because, for cultural reasons, parents preferred their daughters to be taught by female educators and only 8.3% of all primary schools were for girls. Female educators were very scarce in rural Balochistan due to historical lack of education opportunities for local women and the fact that urban female educators were unwilling to re-locate to rural Balochistan.

E) Time period for implementation: 1990-1998

F) Outcome or impact information, and/or information from any evaluation: The initial targets of the program in terms of increases in enrolment for girls were exceeded before the end of the reform period. By 1997 the number of primary schools for girls had increased from 503 in 1990 to 1719 (an increase of 241%). The number of girls enrolled in primary school increased to 208,053 (from about 80,000). Dropout rates for girls have fallen and completion rates increased from 7% to 30%. The increases in education quality have also had a positive impact on boys' enrolment (which increased by 23.8%) and secondary school enrolment (Anzar, 1999). Increases in quality, curriculum reforms, training of teachers, and administrative reforms have had permanent impacts on the Province's education system.

Community involvement through a program named Community Support Process also has had a substantial positive impact on school quality and the efficiency of the whole system. Kim, Alderman, and Orazem (1998) report that this component of the reforms, in and of itself, is responsible for an increase in girls' enrolment of 22 percentage points and an increase in boys' enrolment of 9 percentage points.

G) Key of success: The reforms were very successful in the implementation phase, achieving concrete results at a fast pace: - survey research on the demand for girls' education and other factors affecting girls' enrolment;

- management restructuring by establishing a Directorate of Primary Education with complete fiscal and human resources autonomy;
- significant growth in the number of women educators and administrators,
- in-service basic training of all the 8,000 untrained teachers in Balochistan using mobile training unites ;
- curriculum reforms were immediately reflected into 34 new high quality activity-based textbooks written by local professionals with the help of international consultants.

These remarkable achievements were possible due to the following essential elements of this reform:

- all change agents had a deep understanding of the education system in Balochistan and its challenges;
- great partnership between donors , government, NGOs, and local communities. The provincial government and donors consulted extensively during the design phase and the government was able to negotiate conditionality clauses. Parental involvement in the communities was key in the selection of teachers and the building of new schools as well as sending their children to school as soon as there was an appropriate facility;

- synergy between program policies and implementation strategies. Conditions set by local governments and donors focused on gender equality, female teachers, teachers training, and reaching rural areas;
- long -term commitment and stability. Changes were implemented gradually allowing time for reflection and corrective action if necessary;
- training as well as technical assistance to local actors was flexible enough to incorporate lessons learned on the field;
- multiple institutions and actors involved in the reform diffused opposition attempts;
- female leadership was key to promote female education
- an integrated approach which included reform elements, household demand elements (see section IV), and student preparation elements .

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports on the whole reform process and an evaluation study of the Community Support Process. Evaluation team gathered data implementing a rigorous survey. Using statistical and econometric methods they compared children who were beneficiaries of the program with their statistical counterfactual or a comparison group sharing the same initial characteristics as children affected by the program that provide a "simulated control" group (ex-post matched comparison method). This method provides a good estimate of the impact of the program but cannot observe and quantify the full impact (results may also be biased in some circumstances).

I) Cost/Cost-effectiveness: The World Bank committed approximately $120 million for the program in 1993. There is no information in the consulted sources on cost-effectiveness.

J) Funding sources: USAID (initial stages), UNICEF, World Bank, and Provincial Government of Balochistan , Pakistan were the major donors during the 90s. Because of the success of the reforms, more donors have joined : Asian Development Bank, Government of Netherlands, Trust for Voluntary Organizations, Habib Bank Trust, and local NGOs.

K) Reference materials and main source(s) of information for summary: Anzar (1999) and Kim, Alderman, and Orazem (1998).

L) Potential scalability or replication in different contexts: The Balochistan reforms provide lessons for education policies aimed at permanently reaching target groups in remote rural areas. This set of reforms showed that it is possible to achieve significant girls' enrolment changes in a short period of time when policies take into consideration institutional, geographic, and cultural elements, both at the design phase and implementation phase.

- **Vouchers in Colombia**

  The implementation of school vouchers in Colombia was restricted to secondary education. However, this program contains education reform features that are relevant to primary education as well. This program was one of the largest voucher programs in the world (including developed countries) and one of the best designed and evaluated. In spite of the

significant positive impact of this initiative the program was discontinued, perhaps for budgetary reasons.

A) Name of the initiative: Targeted Education Voucher Program-PACES

B) Specific aims and objectives: The main objective of PACES was to increase the transition rate from primary to secondary education by addressing the shortage of space in public schools faced by poor households in large urban areas. The idea was to allow poor students to take advantage of the existing excess capacity in private schools. Voucher resources could be used by private schools to increase capacity and enroll eligible students. Only low-income households (households living in poor neighborhoods) were eligible to participate and students had to apply to qualify for a voucher after they had been admitted to a private secondary school. Vouchers could be used to pay for tuition in private schools that participated in the program but did not cover all the costs of secondary education (the rest was covered by households). Municipalities and schools could choose to participate or not. The choice of municipalities was based on administrative capacity and the number of potential private schools that could participate as well as the number of primary education graduates and the current supply of public secondary education.

C) Operating level : Central government- Ministry of Education, municipal level, and private education sector.

D) Geographic focus/context: During the 1990s Colombia registered very high primary school enrolment and completion rates. The main problems of the Colombian education system arise from inequity issues. One of these inequities is the lack of capacity of the secondary education public system to absorb primary education graduates, which limits education opportunities for the poor. Ultimately, the lack of opportunities beyond primary schooling affects overall education demand among poor households. Municipalities were already managing schools and education policy in their jurisdiction as part of decentralization reforms that preceded PACES. Private schools were already enrolling 40 percent of secondary education students by 1992 and were able to expand enrolment. Targeting was achieved by using poverty maps and accepting voucher applications only from low income neighborhoods.

E) Time period for implementation: 1992-1998

F) Outcome or impact information, and/or information from any evaluation: The program had a large positive impact on many aspects. More than 216 municipalities participated in the program. By 1996, more than 1,700 private schools were participating in the voucher program. Non-profit schools, vocational schools, and schools charging moderate fees had a higher probability of participating than other private schools. Schools that had very low fees were already affordable to the poor. Low fee private schools usually offered lower quality than schools with moderate fees that became accessible to poor students thanks to the vouchers. Vouchers were distributed to 125,000 students from poor households and covered about half the total cost of secondary education. Students who participated in the program were compared to a control group of eligible students who did not get the

vouchers (randomly allocated among applicants). Students using vouchers were more likely to complete the 8th grade , less likely to repeat grades , and scored better on mathematics and language standard tests than the control group.

G) Key of success:

-Good income targeting using poor neighborhoods and poverty maps;

-Full open participation choice for municipalities, schools, and households (municipalities , schools , and households who participate are the ones that can implement the program well and rip its benefits);

-Highly developed private education sector provision in some urban areas of the country;

- Schools that wanted to participate provided a quality that was at least as good as the best public school in the area.

H) Assessment of quality of information / limitations of the methods and/or data: High quality impact evaluation studies. Evaluations included institutional aspects, program design, school quality, and net impact of the program on enrolment and completion. A randomized evaluation with treatment and control groups was used since many vouchers were allocated by lottery among applicants who fulfilled targeting requirements. Standardized tests in mathematics and language were used to assess school quality.

I) Cost/Cost-effectiveness: There is evidence of high cost effectiveness for this intervention. PACES vouchers' value was about $190 in 1997 while the total tuition and fees costs of private schools were $340 on average. On the other hand the average annual per student expenditure in the public secondary school system was over $350 (and parents paid about 58$ extra). Compared to an equivalent expansion of the public education system, the voucher program increased annual public expenditure by $24 per participant student. These public extra costs and the additional private cost incurred by households were exceeded by the current market value of additional educational attainment (by 1996)**.** However, the total cost of the program may have been too high to be financed by the Colombian government after the pilot phase ended. Another explanation for the discontinuation of the program may have been a change in education authorities and the identification of the program with some political actors.

J) Funding sources: The World Bank financed the pilot phase and part of the costs of the program during the first years of implementation. Most of the resources for vouchers were provided by Colombia's Central government. Municipalities financed (20%) and some private schools also financed a portion. The voucher program also increased private investment of households in education by an average of 70% the value of each voucher.

K) Reference materials and main source(s) of information for summary: King, Rawlings, Gutierrez, Pardo, and Torres (1997) and Angrist, Bettinger, Bloom, King, and Kremer (2001)

L) Potential scalability or replication in different contexts: The program did not continue in Colombia in spite of its good results because it may have encountered financial scalability problems. The successful

implementation of vouchers requires a highly developed education private sector and high pre-program enrolment rates.

2.2.- Promising Interventions in Education Sector Reform

- **Ethiopian Education Sector Development Program /Basic Education Systems Overhaul**

A) **Name of the initiative:** Basic Education Systems Overhaul (BESO) (funded by USAID) and Ethiopian Education Sector Development (funded by the World Bank and UNICEF).

B) **Specific aims and objectives:** The Ethiopian reforms had very wide goals:

- Reach universal primary education by 2015;
- Improve education quality;
- Improve education system efficiency and financial sustainability.

C) Operating level : Ministry of Education and regional education authorities in eleven regions.

D) Geographic focus/context: In 1991, a coalition led by the Ethiopian People's Revolutionary Democratic Front (EPRD) ousted the Mengisto Regime (Mengisto had concentrated power under a socialist platform since 1974). After the first elections in decades, the EPRD had the mandate of reforming the country including its deficient education system. The primary gross enrolment ratio was under 20%. Female enrolment was below 12%. In addition to this very low average achievement, education in Ethiopia had severe geographic inequities because the country is comprised of very diverse regions inhabited by distinct ethnic groups with different languages.

E) Time period for implementation: 1991-2002.

F) Outcome or impact information, and/or information from any evaluation: The case of Ethiopia is one of the few successful systemic reforms in Sub-Saharan Africa.[8] The reform was flexible enough to incorporate new knowledge from each of the components of the system and use this knowledge towards the goals of the reform. The wide reforms successfully increased public spending on primary education in absolute terms. The Ethiopian government was particularly effective at distributing resources to schools on an equitable manner across regions. Successes reported on the following activities:

- Reaching remote rural areas;
- Building new schools using hollow concrete blocks (shown by economic analysis to be preferable to traditional mud and thatch structures);
- Community involvement in school building construction and management;

[8] Other comprehensive reforms in Southern Africa have been undertaken in Uganda, Malawi, Guinea, and Benin. All of these reforms have had good results in terms of increasing enrolment and improving quality. The cases of Uganda and Malawi will be discussed in Section IV, since one of the most prominent features of the reforms was eliminating school fees to increase household demand for education and increase access for poor children.

- Reaching excluded ethnic groups with a curriculum that fits their needs (local languages);
- Providing teacher training;
- Increasing number of female trained teachers;
- Improving gender sensitivity in curriculum development;
- Improving the quality of the curriculum;
- Increasing availability to high quality and current textbooks.

These activities were responsible for an increase in the overall primary enrolment ratio from 20% in 1991 to 57% in 2001. Female primary enrolment ratio increased from 12% in 1991 to 47% in 2001.

These reforms were less successful in improving efficiency (reducing repetition rates for instance) and reallocating resources in the education system towards primary education.

G) Key of success:

- Strong political commitment by the administration in charge of implementing the first phase of the reforms;
- The education system was opened to accommodate several innovations happening simultaneously;
- High levels of technical cooperation and technological transfer;
- Administrative decentralization led to better responsiveness of the system to regional needs;
- Community involvement;

H) Assessment of quality of information / limitations of the methods and/or data: The wide education reforms in Ethiopia are considered a success story in several reports by organizations that are involved on the funding and implementation of all the project activities. One of the reports is an economic analysis of World Bank Education Projects and Project Outcomes based on a sample of 104 education projects between 1993 and 1998. Projects are evaluated according to their design (analysis of alternatives, fiscal impact, quality of cost/benefit analysis, beneficiary assessment and poverty analysis, and institutional risk analysis) and their implementation results. A USAID report analyses the results of the specific policies and programs implemented through the reforms as well as the general characteristics of the reforms in several countries of Sub-Saharan Africa (Uganda, Benin, Malawi, Guinea, and Ethiopia). However, none of the reports used systematic impact evaluations.

I) Cost/Cost-effectiveness: Reforms were financed by conditional donor support (Total of $93.3 million). Donor support represented about 14% of initial public expenditure over the life of the program. An essential part of Ethiopia's wide ranging reforms was its effective administrative decentralization in the country's eleven regions. Thanks to this decentralization and the negotiation of a funding plan for regions through grants and loans (funded by the World Bank), the Ethiopian government was particularly effective at distributing resources to schools on an equitable manner. The incentives of the reform were consistent with high cost-effectiveness at the region and school level, but there is no empirical

evidence on the consulted sources. On the other hand, it took the Ethiopian government a long time to reallocate money towards primary education.

J) Funding sources: World Bank, USAID, and UNICEF provide funding. Academy for Educational Development, American Institute of Research, CARE, Research Triangle Institute, Save the Children, UNICEF, and World Learning provide technical expertise and project management for different components of the reform.

K) Reference materials and main source(s) of information for summary: Basic Education Coalition (2003), Moulton, Mundy, Welmond, and Williams (2001), Research Triangle Institute (2003), and Vawda, Moock, Gittinger, and Patrinos (2001).

L) Potential scalability or replication in different contexts: The education sector reforms in Ethiopia combined in depth decentralization with overall increase in quality through simultaneous innovations in specific areas (curriculum development, teacher training, and textbooks in local languages). Community participation helped build new schools as well as increase male and female enrolment. The flexible Ethiopian model is a reference for poor countries with significant regional differences. An important element of its success, was the strong political commitment to the reforms. The survival of the new party in power depended in part on the success of these education reforms; hence, this type of commitment was idiosyncratic.

- **India District Primary Education Program**

A) Name of the initiative: District Primary Education Program

B) **Specific aims and objectives:** India's wide spectrum Education Reform had three simultaneous objectives:

- Increase coverage of primary education (increase enrolment and retention, especially in remote areas);
- Increase equity (reduce differences in enrolment by gender and social strata to less than 5%)
- Improve education quality (increase learning achievement by 25% over measured baseline levels);
- Increase efficiency (reduce waste of financial resources, reduce primary education completion time, reduce dropout rates to less than 10%)).

C) **Operating level:** Decentralized design and management. Education Ministry, State, and district education authorities participated in the project design. Operating level was the district.

D) **Geographic focus/context:** India has pursued Universal Elementary Education since its independence with notable progress. However, by 1991 the literacy rate was only 52%. In addition, 33% of all children aged 6-14 were out of school. Severe gender inequalities were a big challenge (two thirds of all out of school children were girls and female literacy was only 39%). These dismal results coexisted with a country -wide primary school network that had the capacity of reaching 95% of the school age population. High dropout rates and low quality were responsible for the low overall education completion relative to capacity.

E) Time period for implementation: 1995-1999

F) Outcome or impact information, and/or information from any evaluation: Positive results of the program include improving access, quality, retention, learning achievement, and system efficiency. The initial pilot phase of the program started in seven states (covering 11% of all primary students). The program has been successfully scaled up to reach about 55% of India's primary school population.

- Access: enrolment in the districts that are included in the program has increased at a faster rate than in non-program districts. Enrolment increased between 5.5% and 6% in districts that participated in the program.
- Gender Equity: Enrolment of girls increased faster than enrolment of boys in the districts that participated in the program.
- Social Equity: the program used an Index of Social Equity as a monitoring tool. This index has improved significantly because of the gains in access by low caste children and groups in living in remote areas.
- Efficiency gains: internal efficiency , measured by the average actual years to complete primary school relative to the ideal number of years, improved in the districts that participated in the program. Dropout rates and repetition show some reductions, but the evaluating team faced significant data challenges to measure these variables.
- Learning achievement measured by standard language and mathematics tests, improved significantly in the districts that participated in the program.

Other benefits of the reform were improvements in school construction, community participation, capacity building, better trained teachers, and spread effects (textbooks and teacher training packages produced during the reform are also used in districts that did not participate in the other activities of the program).

G) Key of success:

- Great design and flexibility to adapt design to specific factors during pilot phase. Sufficient preparation time ;
- Focus on student learning;
- Decentralization and local empowerment;
- Emphasis on continuous learning and education;
- Using external agents an consultants to catalyze change;
- Constant capacity-building and reaching to latent capacity in the community to help improve education (through workshops and contacts).

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports. Impact of the reform is obtained by comparing the evolution of schooling in districts that participated in the program with districts that did not participate in the reform. This method could overestimate or underestimate the net results of the reform.

I) Cost/Cost-effectiveness: Program expenses represented only 10% of total annual spending in primary education.

J) Funding sources: Government of India and World Bank.

K) Reference materials and main source(s) of information for summary: Sharan Pandey (2000) and World Bank (1999).
L) Potential scalability or replication in different contexts: This reform was scaled up with great success. The experience of India with these fast paced and wide range reforms can be achieved in countries that face the challenge of expanding access and at the same time improving the system's quality.

2.3- Interesting Interventions in Education Sector Reform[9]

- **Money Straight to the School, Brazil, 1995-present:** Brazil has undergone several education reforms that have included decentralization efforts. This initiative supports decentralization and school autonomy by enhancing school financing capabilities. This initiative has had encouraging results in the state of Minas Gerais where the state gave local communities a space in school governance by enacting mechanisms of participation in school boards. In addition to a basic budget, each school receives a grant based on enrolment. The board decides how to allocate resources from the grant and also raises money locally for additional school improvements.
- **Decentralization in Nicaragua, 1993-present:** Nicaragua's education sector reform gave more managerial and financial autonomy to schools and their school boards. Overall results indicate efficiency gains. However, results vary greatly depending on the environment surrounding the school and school management. Funding for this project was provided by the World Bank.[10]
- **Licenses to Operate Schools in Bogota, Colombia (Programa de Colegios en Concesion):** The objective of this project is to appoint the management of each newly built school in a poor area to a team of education managers working in a high quality private school near the area. Licenses are allocated through a competitive and transparent process for 15 years. Licenses are renewable after an evaluation. When the project is in full operation, the license system will reach 45 thousand children (4% of all public schools in Bogota).

III) IMPROVING PRIMARY SCHOOL EFFECTIVENESS

Efforts to improve learning in the classroom include a broad range of interventions focused on direct education inputs and developing school-based management. According to the evidence on education inputs and education results in developing countries, the list of effective interventions on school inputs includes: initial and ongoing teacher training, improving the quality

[9] For more information on these programs see De Andraca (2003).
[10] Fuller and Rivarola (1998). See Patrinos and Ariasingam (1997) for a discussion about decentralization in education provision.

and availability of teaching materials (teacher guides and textbooks), improving the schools' physical plant (presence of toilets, blackboards, chairs), keeping students actively involved (asking comprehensive questions and stimulating interaction), raising the number of days and hours in class, increasing the percentage of female teachers, and lowering the pupil/teacher ratio[11]. Interventions aiming at improving school management include greater parental and community involvement, establishing school evaluation systems, and linking school financing to performance. In this section we also include some interventions to improve education effectiveness through distance education and technology within formal schooling.

3.1- Successful Interventions in School Effectiveness

- **EDUCO –Program- El Salvador**

A) Name of the initiative: EDUCO

B) Specific aims and objectives: Provide basic education to remote rural areas that were severely impacted by civil war. The program started by providing basic education up to the third and fourth grades. The main feature of the EDUCO program is the strong involvement of parents and the community in the governance of each school and the provision of inputs for education. EDUCO 's principles are: share the responsibility of basic education coverage with the local community, promote the participation of rural poor communities in the design and administration of education services (in order to have the services more tailored to their needs), decentralization and more efficient administration than traditional rural schools, and improve teacher's supervision through parental involvement. Each EDUCO school is administered by a community association made up of by parents and teachers (ACE). ACEs are elected every three years by community members and are responsible for: hiring and firing teachers, monitoring teacher's performance, manage all school funds (bank account that receives transfers from the Ministry of Education), fundraising for school improvement programs outside the official budget, and generate and coordinate community efforts to improve the school through volunteer services.

C) Operating level : EDUCO's national coordination program is in a branch of the Ministry of Education. EDUCO also has coordination offices at the regional level. Each ACE interacts with the corresponding EDUCO regional coordination office but also with other branches of the education system independently.

D) Geographic focus/context: Rural remote areas in El Salvador that were affected severely by the civil war. In these areas there were about half million children with no access to basic education. El Salvador registers relatively low average years of schooling in rural areas (5.7 in the year 2000) for both men and women in comparison to middle income countries.

[11] For a complete survey on school effectiveness see Scheerens (1999), Saunders (2000), and Pineros and Rodriguez (1999).

However, El Salvador registers higher average years of schooling in rural areas than Guatemala, Honduras, and Nicaragua (ECLAC,2000).

E) Time period for implementation: 1991-2003.

F) Outcome or impact information, and/or information from any evaluation: EDUCO is a success story in increasing education coverage in remote areas quickly. By 1997, EDUCO schools had about 194.000 children enrolled. The program was managed at the school level by 1750 ACEs (1997) in different regions. EDUCO schools have worse building infrastructure and less experienced teachers than traditional rural schools. On the other hand, they counted on more educated teachers and more textbooks per child than traditional rural schools. Parents devote more time to school meetings and children's homework under the EDUCO model. Teachers devote twice the time to meetings with parents. Educational outcomes of children in EDUCO schools in remote poor rural areas are not statistically different from children in traditional rural schools. The program has been effective at targeting the poorest rural households.

G) Key of success: EDUCO introduces accountability and co-responsibility to education administration. The program was very well designed (based on a UNESCO study). Coordination of the ACE network by the Ministry of Education. ACE's independence in their budget management and hiring decisions. Some challenges remain in order to develop better contracts for EDUCO teachers.

H) Assessment of quality of information / limitations of the methods and/or data: Rigorous evaluation methods. The methodology of the evaluation was an ex-post matched comparison between the population covered by the program and an equivalent group not served by it. The data was generated using a special survey, student learning tests, and existing household surveys. Econometric analysis of the baseline data also controls for household characteristics and selection (selection of a particular community by the government). The main limitation of this methodology is that evaluation was not incorporated in the design of the program from the beginning and the participant community selection is not random. Thus, differences in inputs and performance could be, in part, related to geographic and socio-economic factors outside the program.

I) Cost/Cost-effectiveness: The annual cost per EDUCO student was about $85 versus $73 per traditional primary school student in 1992**.** The program has increased public and private investment in education.

J) Funding sources: World Bank and Government of El Salvador.

K) Reference materials and main source(s) of information for summary: World Bank (1997), PREAL (1999), and Uemura (1999).

L) Potential scalability or replication in different contexts : EDUCO is a success story in increasing education coverage in remote areas quickly. Currently the program is expanding to other geographic areas and including up to sixth grade of basic education. Some aspects of this program could be applied in poor and marginalized areas in other developing countries.

- **Chile : School Evaluation and Rewards System**[12]

A) Name of the initiative: System of Measurement of School Quality- Sistema de Medicion de la Calidad de la Educacion (SIMCE) and National System to Evaluate School Performance- Sistema Nacional de Evaluacion de Desempeno de los Establecimientos Educacionales Subvencionados (SNED).

B) Specific aims and objectives: The system of school evaluation and rewards was implemented with the objective of monitoring school quality. A second objective is to provide incentives to quality improvement at the school level. While achieving the previous objectives this integrated evaluation and rewards system contributes to the dissemination of good practices among similar schools and throughout the country. The SNED provides merit awards to basic and secondary schools. The awards must be used as bonuses to teachers. School performance is measured by an index containing six factors: effectiveness (absolute SIMCE scores based on students results on standard tests in language and mathematics and integration of students with special needs), improvement (change on SIMCE scores), initiative (teachers' workshops and participation in the governance of the school), working conditions, equality of opportunity (rates of retention and promotion, incorporation of students from poor households or with severe educational deficits), and integration of teachers, parents, and guardians in school governance. The highest weight is on school effectiveness (approximately 40% of total score). Schools are stratified in groups using statistical cluster analysis according to the socio-economic level of the community they serve, rural or urban location, multigrade school or traditional school, and other criteria. Schools compete only with schools in the same homogeneous group.

C) Operating level : Ministry of Education, Regional Education Authorities, and District Level Authorities.

D) Geographic focus/context: Urban and rural. Chile is at a relatively advanced stage of educational development with enrolment ratios similar to those of developed countries. Inequities in access and quality were, and are still, relatively high. The country has undergone three consecutive wide range education sector reforms (see previous section). The last wave of education reform emphasizes quality improvement and better work conditions to teachers.

E) Time period for implementation: Student Assesment System : 1988-present; School Evaluation System : 1995-present.

F) Outcome or impact information, and/or information from any evaluation:

- Evaluations suggested that the system is a powerful tool for school improvement and problem diagnosis;

[12] Other countries in Latin America have implemented similar evaluation systems. De Andraca (2003) summarizes evaluations of initiatives in Argentina (SINEC, established in 1993), Brazil (SAEB, implemented in 1990), and Costa Rica (since 1989).

- Awards offer significant help to teachers, especially those working in remote areas;
- Evaluation and award system is perceived by teachers and school directors as fair;
- Evaluations showed that the stratification of schools into homogenous groups is highly desirable. Detailed interviews suggested that homogeneous groups should be established within each region and not the country as a whole;
- Evaluations suggested ways of improving the system.

H) Key of success:

- The country has had a national student assessment system for more than 15 years (SIMCE) which is the base for the evaluation and awards;
- Schools are stratified and competition only takes place among schools with similar characteristics. In the same strata the awards are fully competitive and schools can win consecutively;
  -Awards go to school establishments (avoiding incentive problems associated with merit pay to individual teachers)[13]. The award is paid directly to all teachers as a bonus;
- Careful design and evaluation;
- Teachers and school directors are involved in the design and evaluation of the system.

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports and government evaluations. The evaluation methodologies of these studies had the objectives of assessing the system and improve its design. The evaluations contributed significantly to the design and further improvement of the evaluation and awards system. However, the evaluations provided little information on the net impact of the reward system on student's performance.

I) Cost/Cost-effectiveness: Sources do not provide information on cost/cost-effectiveness.

J) Funding sources: Government of Chile.

K) Reference materials and main source(s) of information for summary: McMeekin (2000) and PREAL (2002).

L) Potential scalability or replication in different contexts: This large-scale initiative is replicable in countries that do not have dramatic regional disparities in terms of language and culture. In the case of Chile, education varies greatly by income level and urban versus rural residence. These factors were used to stratify schools into homogeneous groups and stimulate competition among equals, while preserving the national character of the evaluation system. The last wave of education reform in Chile emphasizes

[13] Mizala and Romaguera (1999) cited on McMeekin (2000) mention the problems associated with individual bonuses to teachers considering the complexity of the education process: - difficulty of measuring the contribution of each teacher; - leads to perverse dynamics in teachers' work environment;- difficulty of adding new variables in addition to student performance associated with teachers' effort and preparation during the evaluation.

quality improvement and better work conditions to teachers. These pre-conditions were favorable to an evaluation and rewards system.

- **BRAC Education Programme -Bangladesh[14]**

A) Name of the initiative: Bangladesh Rural Advancement Committee- BRAC Education Programme

B) Specific aims and objectives: BRAC is one of the most innovative programs in the last two decades. Instead of trying to bring children who are out of the school system to the system, this initiative brings the most effective school possible to out of school children (both children who had never attended school and primary school dropouts). The main objective of BRAC was to create schools that would be accessible to poor children in rural areas. The program has a special emphasis on increasing the participation and attainment of girls in poor rural areas. BRAC schools have the following components:

- Each school consists of 30 children that have not been reached by the formal education system living within a 2 Km. radius of the school;
- Primary education model that delivers basic literacy and numeracy in a three –four year period;
- Short and flexible hours allow children to help their parents on the fields or at home;
- Little or no homework assigned;
- No school fees or associated fees for parents;
- Schools provide all school supplies;
- 70% of students must be girls;
- 70% of teachers are local married women with 9 or more years of education. The emphasis on married women is part of the efforts to provide a safe and culturally acceptable environment for girls;
- Strong teacher training and monitoring component (with ongoing training and visits by BRAC workers every month);
- High levels of participation by parents and the local community on school governance, curriculum design, and hours (parents must attend meetings every month);
- Schools operate in one room usually rented for a few hours a day. Students sit on mats and use slates for writing;
- After "graduation" from BRAC schools children are encouraged to continue their education in the formal schooling system

C) Operating level : BRAC is a development NGO operating at the school level .

[14] In Iran, UNICEF finances a program tailored to the needs of rural working girls. The key elements to its success are: promotion in the community, flexible hours, careful selection of female teachers, safe locations, inter-active methods, and appropriate educational materials. In China, another UNICEF program provides basic education for out of school adolescent. More information on these projects can be found on UNICEF's Evaluation Database (www.unicef.org/evaldatabase/index 14449) .

D) Geographic focus/context: Remote rural areas in Bangladesh. Bangladesh is a very poor country that experiences great challenges towards the MDGs in education and gender equality (by 1990 female literacy rates were about 22% , the enrolment rate was only 60%, and the average primary education completion rate was 20%). BRAC was founded in 1971 as a hunger relief organization evolving towards a development organization. BRAC's mission is to build the capacity of the rural poor.

E) Time period for implementation: 1985-present

F) Outcome or impact information, and/or information from any evaluation: The program was launched in 1985 with 22 experimental schools and it was expanded very rapidly. By 1996, BRAC operated in 34,175 schools all over the country. BRAC also partners with other NGOs in Bangladesh for domestic project replication reaching about 8,000 more schools. More than 90% of BRAC students complete the basic cycle and a large proportion are admitted into Class IV or higher in the formal school system.

G) Key of success:

- Program design is based on extensive research about why target group never attended school or dropped out of the formal school system, mainly: poverty, gender discrimination, distance from home, curriculum irrelevant to village life and economy;
- Excellent targeting;
- Strong teacher selection and training component;
- Flexibility and low cost;
- High levels of parental and community involvement;
- High levels of child participation and integration into the learning process;
- Each school ends after the class graduates and does not re-open until there is a sufficient number of new students.

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports and rigorous impact evaluations commissioned by program donors. Several methods were used: field visits, case studies, household surveys, and cost studies.

I) Cost/Cost-effectiveness: BRAC unit costs for schooling are equivalent to those incurred by the formal public system. However, BRAC 's extra private costs paid by households are nil and significantly lower than the private costs of formal public schooling.

J) Funding sources: UNICEF, SIDA, NOVIB, ODA, KFW, Government of Netherlands, DGIS, DFID, Aga Khan Foundation-CIDA.

K) Reference materials and main source(s) of information for summary: World Bank (2003 b), BRAC Education Program (2003), and Craig, Kraft , and Pleiss (1998).

L) Potential scalability or replication in different contexts: This project has been successfully scaled up and replicated in Bangladesh's rural context and some poor urban areas. Some elements of the project can be applied with success in rural schools in other countries. On the other hand, the school model itself is hard to replicate in different contexts because it is extremely well targeted to the needs of rural households in Bangladesh.

- **Guatemala New School: Nueva Escuela Unitaria**[15]

A) **Name of the initiative:** New Unit School- Nueva Escuela Unitaria (NEU)

B) **Specific aims and objectives:** NEU is a multigrade schooling program developed for the rural areas of Guatemala. The NEU was based on the Escuela Nueva model in Colombia, which involved children in their own education through a participatory approach. The main objective of the initiative was to increase enrolment and retention in rural areas, especially for girls and ethnic Mayan children. In addition, the NEU aimed at improving educational achievement and school retention. Some of the elements of this initiative are:

- Teacher training (including training in Mayan language skills);
- Teacher participation on curriculum design and management (Circulos de Maestros);
- Education materials production by teachers ;

Inclusion of private schools in the program.

C) Operating level : Ministry of Education and local education authorities.

D) Geographic focus/context: At the end of a cruel civil war the Government of Guatemala started this program in order to improve access, quality, and equity of educational opportunities for indigenous and other rural populations. Rural regions were partly covered by multigrade schools facing many challenges (high rates of drop out and repetition) . At the end of the 1980s , only 10% of children in rural areas completed primary basic education. Quality was also poor with high rates of teacher absenteeism, repetition, curriculum irrelevance, and memorization as the primary tool for learning.

E) Time period for implementation: 1989-present

F) Outcome or impact information, and/or information from any evaluation: The program started as a small pilot, but by 1996 there were an estimated 927 schools participating on the NEU with 49,472 students. The project led to significantly higher attendance and school completion rates. NEU schools had more active participation by girls and Mayan students. Teachers received twice the training on how to work with girls and ethnic minorities than teachers in traditional schools.

G)Key of success:

- Excellent targeting;

[15] This program is based on the Nueva Escuela Primaria (New School) implemented successfully in Colombia since 1975. In Colombia, the Nueva Escuela has significantly improved access and quality to education in rural areas. Multigrade schools have been implemented in several Latin American, Asian and African countries. Costa Rica started a pilot multigrade school project in 1995. In the Dominican Republic, multigrade schools are a tool to improve equity (see multiphase program described below). For more on Latin American countries implementing multigrade schools see De Andraca (2003). For more on multigrade schools in Africa see UNICEF (2004).

- Strong teacher selection and training component;
- Flexibility and low cost;
- High levels of parental and community involvement;
- High levels of child participation and integration into the learning process;
- Excellent low cost school materials produced by teachers participating in the program taking into account local needs and preferences;
- Decentralized implementation;
- Flexible student promotion (students progress through study units at their own pace).

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports and rigorous impact evaluations commissioned by program donors.
I)Cost/Cost-effectiveness: No information on total cost or cost effectiveness was provided in the sources of information used in this summary.
J) Funding sources: Government of Guatemala and USAID.
K) Reference materials and main source(s) of information for summary: PREAL (2003) and Craig, Kraft, and Plessis (1998)
L) Potential scalability or replication in different contexts: This program was scaled up in Guatemala and replicates the principles of a previous experience on multigrade schooling in Colombia. Thus, the initiative could cover more schools in Guatemala and could be an interesting model for countries with vast excluded rural populations.

3.2.- Promising Interventions in School Effectiveness

- **MAYA –India : Community Ownership for Better Schools**

A) Name of the initiative: MAYA –Movement for Alternatives and Youth Awareness- Prajayatna Process.
B) Specific aims and objectives: MAYA's primary approach is to build empowered human institutions of the poor and enable local democracy. The Prajayatna is a citizen's initiative, facilitated by MAYA, that seeks to bring sustainable educational reform by strengthening institutions of local self-governance and civil society towards community ownership of the education system. Periodic meetings and councils at the school, administration, and state government level enable the process of continuous education improvement. Prajayatna contains the following elements:

- Village level meetings to diagnose problems in the school and think creatively about solutions that involve the community;
- Accountability mechanisms;
- Institutional capacity building working with elected functionaries of local self-governing bodies;
- Facilitating access and use of information (surveys and databank);
- Connecting all stakeholders and forming partnerships between parents, school administrators, teachers, and government officials.

C) Operating level : MAYA is an NGO operating at the local community level.

D) Geographic focus/context: MAYA's education reform initiative addresses issues of quality of 15,000 Govt schools in 6 districts of Karnataka, (viz., Bangalore Urban, Bangalore Rural, Mysore, Chitradurga, Bellary and Bijapur) through working with children parents, school committees, the education bureaucracy in the 6 districts and also the State bureaucracy. The state of Karnataka registers relatively high levels of enrolment and retention in comparison with other regions in India. Education in Karnataka faces important equity and quality challenges.

E) Time period for implementation: 1999-present

F) Outcome or impact information, and/or information from any evaluation: More than 1000 Shikshana Grama Sabhas Councils facilitated across six districts. The consultation process has also produced a primary school databank to inform reform and policy with information about 12,000 government schools. Schools that participate in the program report infrastructure improvements and new construction undertaken by parents and the school.

G) Key of success:

- Methodology of school governance participation that incorporates the culture and characteristics of local communities;
- Excellent selection and training of facilitators and volunteers. Facilitators show strong leadership qualities;
- High level of commitment and accountability of the organization and school authorities.

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports to donors (Annual Report). The intervention has not been evaluated in terms of net impact on children learning.

I)Cost/Cost-effectiveness: No information on cost effectiveness.

J) Funding sources: State of Karnataka, bilateral agencies, and individual contributions.

K) Reference materials and main source(s) of information for summary: Maya (2002), Banerjee (2000), and field visit of the Task Force on Education and Gender Equality –July 2003.

L) Potential scalability or replication in different contexts: MAYA has been successfully scaled up in the state of Karnataka. The key of MAYA's success is their knowledge of the communities they work with. The model of community participation is replicable in different contexts only after considerable re-design to take into account the culture and context of each community.

- **Venezuela: Mathematics and Radio : Interactive Mathematics for Basic Education**

F) **Name of the initiative:** Interactive Mathematics-Matematica Interactiva - Matematica Divertida.

G) **Specific aims and objectives:** Improve the quality of mathematics teaching in the first three grades of basic education. The radio program is designed to combine listening with class activities. Classroom activities following after the radio program include reinforcement of the contents of the radio program as an evaluation of the new techniques learned. The program includes materials and training for teachers. A second objective of the program is to increase the motivation for learning mathematics using short stories in which characters need to apply their mathematical techniques. Additional motivational aids include songs, puzzles, and games.

C) Operating level : The program was developed and implemented at the state level by CENAMEC (a public foundation to improve the teaching and learning of the natural sciences) **.**

D) Geographic focus/context: Urban and rural schools in poor neighborhoods. Venezuela registers relatively high levels of enrolment and completion. However, the country's education system suffers severe quality and equity problems.

E) Time period for implementation: 1991-present.

H) Outcome or impact information, and/or information from any evaluation: The program has grown significantly and it operates now in the whole country. Evaluation results indicate that children's ability to learn mathematics is enhanced. The ability of teachers to teach mathematics is significantly improved.

I) Key of success:

- Teacher training;
- Excellent support materials for teachers and students;
- Radio reaches even the most remote areas;
- Sessions are fun for students;
- Efficient implementation and administration at the state level (structure at the CENAMEC);

H) Assessment of quality of information / limitations of the methods and/or data: High quality reports and evaluations. Evaluations included the implementation of standard performance tests in mathematics to children who had participated in the program and children who did not participate in the program but had similar school preparation.

H) **Cost/Cost-effectiveness:** Total costs of the program are approximately $500, 000 for one complete series. The cost per student per cycle is $1.76 signaling high levels of cost effectiveness.

J) Funding sources: Venezuelan private sector and World Bank.

K) Reference materials and main source(s) of information for summary: Ghetea, N. and Vasquez, V (1999) and PREAL (2000).

L) Potential scalability or replication in different contexts: This program was successfully scaled up. The program is itself a replication of a smaller initiative in Nicaragua.

- **Multiphase Program for Equity in Basic Education, Dominican Republic:** The objective of the program is to improve equity by: increasing

primary education access and achievement in rural areas; increasing primary education access and achievement in excluded urban areas; improving school management. In order to improve access in rural areas the project proposes a multigrade school model that encourages the active participation of students. This project was financed by the Inter-American Development Bank.[16]

3.3- Interesting Interventions in School Effectiveness

- Teacher training: teacher education and ongoing teacher training programs are key for school effectiveness. The best programs are those that allow continuum learning by teachers, keep teachers directly involved in the design of training programs, and establish mechanisms of support for teachers' long-term professional development (committees, networks, groups within unions). Most of the success stories in this paper have a strong teacher-training component. Additional examples of successful teacher training programs are: Botswana Primary Education Improvement Project, The Basic Education Teacher Diploma (Namibia), Lesotho's Teacher Support Network, Malawi School Support System, and the Rajasthan Training Program (India). In Guinea the government is implementing a Small Grants Program for teachers that includes grant writing training and other learning opportunities. Traditional and new information technologies can be a great tool for ongoing teacher training. In Brazil, distant education for teachers uses TV as an essential tool (TV Escola). [17]
- Community Participation: Community participation is a key element in many of the projects summarized in this study. [18] Additional examples of how community participation and parental involvement can improve the quality of schools are: Basic Education Project (Chad), Education Reform Project (Bolivia), Human Resources Development (Tanzania), and Honduras Basic Education Program. In Ghana, the UNICEF project Childscope seeks to empower parents and teachers to understand the needs of children. Parents and teachers work together in planning and implementation activities to enhance children's learning. The community has helped improve the physical plant of the schools. [19]
- Multicultural-multilingual and bilingual education: Countries with diverse ethno-linguistic groups face additional equity challenges for universal primary education. Successful programs in multicultural – multilingual education go beyond translating contents from the official national textbooks to incorporate knowledge idiosyncratic to ethno-

[16] De Andraca (2003) has more information about this project.
[17] See World Bank (2003, b), World Bank (1999), and PREAL (2003).
[18] Uemura (1999).
[19] Agarwal and Hartwell (1998)

linguistic groups. Mexico has a long tradition of multilingual education with specific public education programs operating since 1963. Currently, Mexico's CONAFE (Consejo Nacional de Fomento Educativo) is implementing formal and non-formal programs for indigenous groups in their native tongue and Spanish using high quality bilingual textbooks and a wealth of pedagogic materials (cassettes and short stories' books) [20].

- Application of Information and Communication Technologies to Education: Information and communication technologies transform distant learning. Radio and TV have been used for teacher training, primary, and secondary education for decades. Additional examples of the use of radio and TV are: Secondary Schooling in Mexico (Telesecundaria) and Brazil (Telecurso). Interactive technologies such as the internet and video conferencing have recently been used with success in both rural and urban settings in Chile (Enlaces) and South Africa (SHOMA).[21] However, steep fixed initial costs and infrastructure needs prevent innovations using TV and the internet from being replicated in the poorest regions of the world. However, radio programs are remarkably inexpensive.
- Programs to Accelerate Learning and Compensatory Programs: These programs design a special curriculum for groups of children who are hard to reach, out of school, or with high repetition rates. The Complementary Basic Education Program in Tanzania (COBET) provides basic education to children who have dropped out of school or have never been enrolled (with a special focus on girls in some provinces).[22]The Complementary Opportunities for Primary Education in Uganda (COPE) was designed to provide an accelerated primary education (equivalent to grade 5 in three years). [23]In Sao Paulo (Brazil), a promising program offers an accelerated curriculum to children who are two or more years behind their age-appropriate grade. Acceleration classes are offered in the same school where the child regularly attends class.[24]In Mexico, a set of Compensatory Programs have the objective of reverting the effects of grade repetition in rural areas. These programs include the provision of

[20] PREAL (2000) and De Andraca (2003).
[21] Techknowlogia (1999)
[22] This project is supported by UNICEF. Helgesson (2001) points out at the great gains in education access thanks to COBET. One remaining challenge of this project is how to place COBET graduates in the formal school system (few children continue to secondary school).
[23] This project is also supported by UNICEF. COPE's methods and materials have been evaluated and considered highly effective (Dewees, 2001). However, the program suffers from high rates of failure and desertion, in part because it remains as a parallel alternative to the formal school system (Dewees, 2001).
[24] This program has had remarkable success and children are able to advance 2-4 grades in one year (De Andraca, 2003).

tailored education materials, training of teachers and school managers, infrastructure improvements, and parental involvement.[25]

- Focusing on Girls: Some countries in Africa and the Middle East are facing significant challenges to increase education access and quality for girls. The African Girls Education Initiative is a multi-country effort that has produced significant results in this arena.[26]In Namibia, a project in the Kavango region (notable for the low levels of girls' enrolment), helped increase the proportion of girls from 25% to 33% between 1992 and 2001. Among the best features of the project is the creation of Girls' Clubs which promote girls participation, confidence, team-work, and leadership. [27] In Yemen, the Hamlet Girls' Schools Project provides education to out-of-school girls. By 1998, Hamlet Girls' Schools had 2,045 girl students in Al-Zeidiyah district, 2560 students in Al Qanawis district, and 2099 students in Radfan district. The key elements to the project's success are: separate schools for girls or separate schedules for girl-only classes, qualified female teachers, convenient school location, support for girl students, and incentives for teachers and supervisors.[28]

IV) INCREASING HOUSEHOLD DEMAND FOR BASIC EDUCATION

Historically, the most drastic intervention affecting household demand for basic education has been the provision of compulsory and free public primary schooling, embedded in the design and regulation of most education systems in the world. In practice, compulsory primary schooling remains a millennium challenge, mainly because, even with free tuition, there are significant direct and indirect costs of schooling that become unbearable for poor households (transportation, uniforms, textbooks, forgone earnings, and forgone household production)[29]. Traditional programs affecting household demand rely mostly on school fees reduction or school fees elimination and public information campaigns about the benefits of schooling. Traditional approaches have produced considerable advancement and recent experiences show that these policies are still relevant. However, we emphasize in our synthesis recent innovative approaches to increase schooling demand for both girls and boys among poor households through "negative price" interventions, such as conditional cash support programs,

[25] De Andraca (2003).
[26] The African Girls Education Initiative is a partnership among countries, donor governments, and UN agencies (UNESCO and UNICEF) launched in 1994. The initiative helps countries develop policies and programs that respond to the specific nature of their girls' education challenges. This program has helped produce girls enrolment increases in Guinea (15 percentage points), Senegal (12 percentage points), Benin (9 percentage points), and Chad in short periods of time. (UNICEF, 2003) .
[27] The project faces obstacles to find dedicated staff and motivating regional officers (Sarti Malone and Haihambo-Muetudhana, 2002).
[28] Alajami, A., Al-Dubaie, A., and Al-Meikhlafy, M. (1998)
[29] Patrinos and Ariasingam (1997)

scholarships for girls, and take-home food rations. Child labor programs, even if not directly aiming at expanding formal education, should also be part of an overall strategy (see section 4.3 on interesting interventions) to increase household demand for education.

4.1- Successful Interventions in Household Demand for Basic Education

- **PROGRESA – OPORTUNIDADES - Mexico:**

A) Name of the initiative: Programa de Educacion, Salud y Alimentacion (PROGRESA, Education Health and Nutrition Program). The program was renamed Programa Oportunidades in 2002. **B) Specific aims and objectives:** increase primary and secondary education enrolment and completion for both boys and girls in poor households. Improve the health and nutrition of participating households (not only the children attending school). Poverty targeting was achieved employing both geographical targeting and household targeting (using household income and a local poverty line). The program provides cash transfers to poor households in the most marginal rural areas (currently under expansion to poor urban areas), conditioned to household members attending school regularly (for children in grades 3-9)(i.e. 85% attendance each month accepting absence for verified health reasons). *Grants increase with grade and higher for girls* (from 80 pesos in Grade 3 to 250 and 305 pesos in Grade 9 for boys and girls respectively). The total (including uniform transfer as part of health component) that can be received by households is capped. Failure to meet conditions leads to loss of benefit, at first temporarily, then permanently. Integrated with a health and nutrition intervention component. Supply side delivered separately and expected to ensure that quality of schooling does not fall.
C) Operating level: mostly household demand for schooling but also has impact on schooling supply and education sector reform. Designed and implemented at the national level by a specific agency (CONPROGRESA) placed within SEDESOL (Ministry for Social Development).
D) Geographic focus/context: Mexico. Before the program started, primary enrolment was 93%, but dropped to 55% in 7^{th} grade in rural poor households. Initially was implemented as a pilot under President Zedillo's presidency in some rural areas, then it was expanded to most poor rural areas, and currently is being expanded to poor urban areas. This project had considerable support from the Zedillo administration as a "poster social program". The program was so successful that it attained sustainability and was adopted and expanded by the current Fox administration.
E) Time period for implementation: Pilot phase started in 1992 and by 1997 the program covered most poor rural areas in the country. Presently, it is under pilot implementation in urban areas.
F) Outcome or impact information, and/or information from any evaluation: Progresa had from the beginning a systematic evaluation component through random selection of the order in which communities will

start benefiting from the program, providing a control group. It has been one of the most studied and scientifically evaluated education programs in Latin America. The program has produced significant positive net impacts in three areas: primary education enrolment and regular attendance, girls' enrolment and primary school completion, and poverty reduction. The program has not produced significant negative impacts on fertility or school quality. More detailed results from these evaluations are summarized in the following paragraphs from Morley and Coady (2003):

- By 1999, the program operated in nearly 20,000 localities, in 2,000 municipalities and 31 states covering 2.6 million families (40% of all rural families).In 1999, the average monthly transfer was 238 pesos per month per beneficiary household, equivalent to 19.5% of mean value of consumption prior to program.
- Poverty headcount reduced in participating communities by about 10%, the poverty gap by 30%, and the severity of poverty by 45%.
- At primary level, the program increases enrolment rate (from 93%) by 0.74-1.07 and 0.96-1.45 percentage points for boys and girls respectively.
- Aggregate effect of increased schooling is equivalent to up to 0.66 years of additional schooling by Grade 9 (0.72 and 0.64 for girls and boys respectively) (a 10% increase in schooling for the poor). The internal rate of return for the program is approximately 8% per year (based on estimates of future wages). Some evidence on reduction of child labor due to the program and reduction of dropout rate.

G) Key to success/lessons learned: Program design and right incentives in place, careful calibration during pilot stage, "poster social program" character that provided sustained political support, major commitment of public funds, good management and implementation from the central agency in charge, and good social marketing. Combination of interventions in three areas (poverty, education, and health) boosted results. Rigorous evaluation was incorporated at the project design stage, generating reliable data and studies. Availability of information about the program and its impact in turn helped maintain high levels of political and economic support.

H) Assessment of quality of information / limitations of the methods and/or data: State of the art data collection and reporting has allowed high quality research and evaluation. Availability of randomly selected control and treatment groups.

I) Cost/Cost-effectiveness: In 1999, the annual budget was $777 million, equivalent to 0.2% of GDP and 20% of the Federal poverty alleviation budget. In 2000, total program budget was 0.2 percent of GDP, or 1.9 percent of total social expenditures. Administrative costs were around 8.9% of total program costs over the period 1997-2000. Households incurred extra travel costs and other private costs that added up to 11.3 pesos per 100 pesos received in the year 2000. Empirical evidence suggests that resources allocated to Progresa cash transfers are more efficient than equivalent resources devoted to building schools.

J) Funding sources: Initial phase was funded by the Mexican Government only. Currently, the Inter-American Development Bank is co-financing the expansion phase.

K) Reference materials and main source(s) of information for summary: High quality independent academic papers and policy and evaluation reports. Morley and Coady (2003), Skoufias (2001), Coady and Parker (2002), Schultz (2001), and PREAL – Best Practices Series (2002).

L) Potential scalability or replication in different contexts : This program is a success story in scalability inside Mexico, across rural areas and now urban areas. However, it would be hard to replicate this experience at the scale and scope that was achieved in Mexico due to its existing institutional capacity in the education sector, consistent political support, and commitment of major resources from the social sector budget.

- **FOOD FOR EDUCATION- Bangladesh**

A) Name of the initiative: Food for Education

B) Specific aims and objectives: Increase basic education enrolment and completion for both boys and girls, poverty alleviation, and food security. Poor households with at least one child aged 6-10 years receive monthly in-kind transfer (usually wheat, but sometime rice) conditional on children achieving 85% attendance per month in primary school. A two stage targeting system was adopted: geographic and household characteristics (landless, female headed households, occupations).

C) Operating level: Household demand. The program is designed and administered at the national level, but implemented through local agencies. A special agency within the Primary and Mass Education Division of the Education Ministry administers the program. At the local level, the municipality (Thana) education officers are responsible for the implementation of the program. School attendance information is translated into food requirements to be processed by the Ministry of Food. The Ministry of Food manages food distribution using a public food supply depot and private suppliers.

D) Geographic focus/context: Bangladesh rural areas. Basic education enrolment and completion drops from 76% in grade 1 to 20% in grade 9 (1997). Significant schooling differentials across income groups. Significant gender schooling differentials (rates for girls about 5 percentage points lower than boys). The program was launched to replace a previous food ration program in rural areas that was very costly and badly targeted.

E) Time period for implementation: The pilot phase started in 1993. The program is still operating.

F) Outcome or impact information, and/or information from any evaluation: Currently, the program covers 2 million rural poor households (out of 8 million poor households) or 13% of all primary school students. Rigorous evaluations have been conducted given the available data (no control groups). The evaluations report a major impact on enrolment. Enrolment increased by 44% for girls and 28% for boys in participating schools versus an average increase of 2.5% in non-participating schools. Researchers estimate that the net impact of the program is an increase in enrolment rates that ranges between 9 percentage points and 17 percentage points, which is relatively large. Reported improvements in attendance and reduction of dropout rates. Evidence of lower quality in participating schools (higher student-teacher ratio and worse grades) than in non-participating schools, but it cannot be attributed to the program. Evaluations report that the program's targeting should be improved. Only 43% of the households are from the poorest 40% group. The value of the transfer is equivalent to $36 per student per year on average, which is a significant value compared to average income per capita in Bangladesh. However, the impact of the program on poverty reduction is not clear, perhaps due to its targeting problems.

G) Key of success/lessons learned: Right incentives in place and excellent subsidy design. In-kind transfers are a viable subsidy option for Bangladesh rural poor settings (non-monetary economy). Institutional capacity on food security and public food distribution. Need to improve targeting mechanisms at the household level and support school quality.
H) Assessment of quality of information / limitations of the methods and/or data: Good data collection by implementing agency and reporting has allowed high quality research and evaluation. However, no treatment and control groups are available in a strict sense. Thus, before program and after program comparisons do not necessarily imply causal relations.
I) Cost/Cost-effectiveness: By the year 2000 the program's budget was 77 million dollars. Evaluations report that this program is relatively efficient and most of the budget (59%) is used in food purchases. The total cost per student is approximately $3 per month.
J) Funding sources: Major sources are the Government of Bangladesh and USAID.
K) Reference materials and main source(s) of information for summary: Ministry of Education reports. Research papers: Morley and Coady (2003), Ahmed and del Ninno (2001), Ravallion and Wodon (1999).
L) Potential scalability or replication in different contexts: This program is a success story of scale-up to cover vast rural areas of Bangladesh. The success of in kind food subsidies in this particular context had a lot to do with Bangladesh's idiosyncratic food security institutions. Similar programs are being implemented in several countries where food security and poverty are impediments to education. [30]

- **Nicaragua- Social Protection Network - Red de Proteccion Social**

A) Name of the initiative: Red de Proteccion Social
B) Specific aims and objectives: Pilot conditional cash transfer program. Main goal was to develop local capacity at the municipal level to implement education (and other social) programs. Cash transfer is given to households with children aged 7-13 years who enroll in grades 1-4, conditioned on 85% attendance each month. The program also includes a health subsidy component.
C) Operating level: Implemented by the central government within the Social Investment Fund agency.
D) Geographic focus/context: Nicaragua. Pilot was implemented in two of the poorest states in the country (rural areas). The net enrolment ratio in Nicaragua was 78% in 1998. Other education attainment indicators are very low on average and also present severe disparities across income groups. Nicaragua is one of the poorest countries in Latin America, and about 48% of its population is poor. The Social Investment Fund is a large -scale project financed by the Inter-American Development Bank, which enjoys

[30] The World Food Programme has supported similar programs around the world . For more information see World Food Programme (2003) (www.wpf.org).

considerable political support and commitment from the current Nicaraguan administration.

E) Time period for implementation: 1999-present

F) Outcome or impact information, and/or information from any evaluation: Very good poverty targeting at pilot stage, mostly due to geographical targeting. The pilot covers about 10,000 poor rural households. The total education cash transfer is equivalent to $133 per household a year. Significant poverty reduction impact, especially for households in extreme poverty. The pilot resulted in large increases in gross enrolment (22 percentage points). Increases in enrolment are similar for boys and girls. Enrolment impact is larger for children in extreme poverty. Promising results in the reduction of child labor.

G) Key of success/lessons learned: Good program design, incentives, and targeting. Appropriate funding available.

H) Assessment of quality of information / limitations of the methods and/or data: Good data collection by implementing agency and reporting has allowed high quality research and evaluation. Availability of treatment and control groups.

I) Cost/Cost-effectiveness: Project budget was 10 million dollars (2.5% of annual government spending on health and education). Reports consider the project cost-effective. Cost-effectiveness has improved with time (for the year 2002 administrative costs were projected to be only 9% of the total cost).

J) Funding sources: Inter-American Development Bank (90%) and Government of Nicaragua.

K) Reference materials and main source(s) of information for summary: Research publications: Moarly and Coady (2003), Rawlings (2002).

L) Potential scalability or replication in different contexts: According to the results in the pilot stage the program could be scaled-up to cover other rural areas of Nicaragua and replicated in other very poor countries.

- **BOLSA ESCOLA- Brazil**

A) Name of the initiative: Bolsa Escola

B) Specific aims and objectives: increase attendance, reduce dropout rates and repetition, and reduce late school entry. Cash transfers to poor households with school age children conditional on 90% school attendance. Transfer is given to mother of household conditional on all children aged 6-15 years attending school.

C) Operating level: Bolsa Escola was first implemented by local governments in Campinas (social assistance program) and Brasilia (education program). Other local governments wanted to implement similar programs and recently all Bolsa Escola initiatives were consolidated into one federal program. Funds for the program are transferred from Secretary of Education to municipality each month based on school records monitored by municipality. Mothers of eligible children are given a magnetic card issued by

Caixa Economica Federal (CEF) so that they can withdraw funds from CEF branches.

D) Geographic focus/context: Brazil both rural and urban areas. Nearly 23% of households are classified as poor. Enrolment rates are high at 96%, nearly 100% in urban areas; with little difference between boys and girls. However, late entry and slow progression are prevalent, especially in poor households. Political context: Cardoso administration and local governments with strong political will to have success stories (to obtain control over budgets).

E) Time period for implementation: First implemented in 1995 by local governments in Campinas and Brasilia. Federal Bolsa Escola Program was created in 2001.

F) Outcome or impact information, and/or information from any evaluation: The program pays approximately $6 per month per child up to a maximum of three children to families with monthly income per capita less than half of the minimum wage. Approximately twenty five thousand families are covered. Expanded to rural areas under the PETI program and Programa de Garantia da Renda Minima, using different design and targeting than urban BE. PETI covered 400,000 children by end of 2000. Targeting has been a challenge and under new program, municipalities select beneficiaries based on criteria set out by central government (i.e. per capita income less than 0.5 minimum wage). Drop-out rates much lower among beneficiaries compared to non beneficiaries (0.4% vs 5.6%, a larger proportion enter school at right age, have higher promotion rates (80% vs 72%), and have similar learning outcomes. Under PETI school attendance was 79%. Transfer to household was approximately equal to the minimum wage (R$130 per month); this raises household with average per capita income from R$44 to R$72, above poverty line of R$65.

G) Key of success: decentralized model, good design and incentives, modern methods of administration and provision.

H) Assessment of quality of information / limitations of the methods and/or data: Availability of reports and high quality research. Randomized experiments not available and impact is likely to be overestimated given that beneficiaries were likely to start off in a disadvantaged position in all dimensions.

I) Cost/Cost-effectiveness: In new program, R$1.7 billion was allocated in 2001 ($68 million); financed by national fund for Eradication of Poverty, with an objective of reaching 10.7 million children from 5.8 million families. By December 2001, 8.2 million children were enrolled from 4.8 million families. The Brasilia program spent $43.8 (on 43,000 students in 22,500 families).
New BE allocated $68 million (R$1.7 billion) to cover 10.7 million children from 5.8 million families in 2001; equivalent to annual $6.3 (or R$15.8) per child or $11.7 (or R$23.4) per family.

J) Funding sources: Initially it was supported by UNICEF. Currently it is funded by the Government of Brasil.

K) Reference materials and main source(s) of information for summary: Ferreira (2001), World Bank (2000), and Morley and Coady (2003).

L) Potential scalability or replication in different contexts : Bolsa Escola is a good example of a successful bottom-up intervention and interesting lessons can be derived from this experience about the challenges of scalability (opposite to PROGRESA – top-down).

4.2.- Promising Interventions in Household Demand for Basic Education

- **PRAF-**

Household Allowance Program , Honduras

A) Name of the initiative: Programa de Asignacion Familiar (Household Allowance Program).
B) Specific aims and objectives: Increase human capital accumulation (health and education) at the household level for households in extreme poverty. Increase children school and health center attendance for first, second, and third graders. Reduce drop out rates for children in first, second, and third grade. This program offers allowances conditional on school attendance for the children in the household aged 6-12 and health center attendance by children and pregnant women.
C) Operating level : Central government with the support of municipalities.
D) Geographic focus/context: Operating in 70 poor municipalities, mostly in the western part of the country (Copan, Ocotepeque, Santa Barbara, Intibuca, La Paz, and Lempira).

E) Time period for implementation: This program was preceded by an earlier version (that included a school voucher and a health voucher) that was implemented between 1990 and 1998. Current version of the program has been implemented since 1998.
F) Outcome or impact information, and/or information from any evaluation: Preliminary evaluation results show impact on poverty reduction and health utilization. By 1999, the program benefited more than 62 thousand children in 953 schools. School allowance is approximately US $5 per month per child , for a maximum of three children per household. Preliminary evaluation results indicate positive impact on school coverage, attendance, and quality.
G) Key of success: Combination of interventions (poverty, health, and schooling), right incentives, good poverty targeting, and resource availability.
H) Assessment of quality of information / limitations of the methods and/or data: High quality reports (PREAL ,2002, and IFPRI, 2000). Systematic monitoring and evaluation system in progress (by IFPRI) using baseline comparison groups constructed with household survey data. Information based on preliminary evaluation results.
I) Cost/Cost-effectiveness: Total budget = $50 million.
J) Funding sources: Inter-American Development Bank and Government of Honduras.
K) Reference materials and main source(s) of information for summary: PREAL (2002) and IFPRI (2000).

L) Potential scalability or replication in different contexts : The program is already working at a high scale in Honduras where poverty is widespread in the participant municipalities. However, there is not enough information available to determine whether it could be replicated in different contexts.

- **Elimination of School Fees in Uganda**[31]

A) Name of the initiative: Elimination of school fees

B) Specific aims and objectives: The elimination of school fees was part of an overall set of reforms in Uganda during the 1990s that had the objective of increasing public spending on primary education, increase enrolment, improve equity , and improve education quality. The abolition of school fees had the objective of making education more accessible to: children in poor households, children in rural areas, and girls.

C) Operating level : Presidency , Ministry of Education , and Education District Offices. In order to reduce opposition to this measure the President established direct channels with the District Offices to enforce this legislation.

D) Geographic focus/context: During its independent history Uganda suffered decades of authoritarian regimes and human rights abuses. During the 1990s, the group supporting President Museveni started political reforms that lead to democratic presidential and legislative elections. Part of the political platform of the President was a major education reform. The President abruptly decreed the abolition of school fees, confronting significant opposition by the Ministry of Education, which favored a more gradual approach.

E) Time period for implementation: 1996-2003

F) Outcome or impact information, and/or information from any evaluation: Surge in enrolment for both boys and girls. Significant increase in enrolment for children in poor households. Overcrowding in classrooms implied a short -term trade off between access and quality.

G) Key of success: Strong political commitment. The elimination of fees was part of major reforms in other areas such as education financing, administration, and overall quality improvement. Teacher training and better teacher salaries were also part of the reforms. This last element may have cushioned opposition to reform among teachers' unions.

H) Assessment of quality of information / limitations of the methods and/or data: Reports from the World Bank and USAID. Lack of systematic impact evaluation.

I) Cost/Cost-effectiveness: Total donor support for Uganda's Education System Reforms (1992-2002) was $135 million. Primary education share of total education expenditure increased by 60.1% between 1994 and 1996. There is no information about cost-effectiveness in the consulted sources.

J) Funding sources: World Bank and USAID.

[31] School fees have also been eliminated in Kenya, Malawi, and Tanzania. Enrolment increased drastically after this measure in all three countries in a very short period of time. The jump in enrolment caused crowded classrooms and new challenges for education quality (UNICEF, 2004).

K) Reference materials and main source(s) of information for summary: World Bank (2003) and Moulton, Mundy, Welmond, and Williams (2001).
L) Potential scalability or replication in different contexts: eliminating school fees can have an impact in countries in which fees are steep and public education available in most regions. In Uganda school fees were high enough to prevent groups of children from enrolling. For this policy to have a significant impact it has to be part of a broader education sector reform to guarantee minimum quality and secure school financing and operations in spite of the lack of fees.

- **Malawi, School waivers for girls**

A) Name of the initiative: School Waivers for Girls
B) Specific aims and objectives: Increase girls' primary education enrolment and completion. Complement ongoing efforts to increase girls' enrolment in primary school. The fee waiver program covers non-repeating girls in grades 2-8.
C) Operating level : Malawi Institute of Education, Ministry of Education, and local level.
D) Geographic focus/context: Malawi registered low levels of primary enrolment, especially girls' enrolment. A program to increase girls' enrolment was signed by the government of Malawi with the assistance of USAID in 1991. Among other instruments this program included fee waivers. The fee waivers preceded a general elimination of school fees in 1994. There were other versions of the same program being implemented simultaneously (World Bank program for grades 1-3 and a separate UNDP program).
E) Time period for implementation: 1991-1995
F) Outcome or impact information, and/or information from any evaluation: the waivers benefited approximately 500.000 girls each year and girls' repetition rates declined. However, even larger increases in girls' enrolment were achieved with the universal elimination of school fees.
G) Key of success: the waivers were part of an overall effort to improve gender parity in education. Other instruments included: developing a gender sensitive curriculum and a national campaign supporting girls' primary education. Another relevant factor in the success of this experience is that recipient girls had to perform well in schools.

H) Assessment of quality of information / limitations of the methods and/or data: USAID report. Lack of systematic impact evaluation.
I) Cost/Cost-effectiveness: No information on cost effectiveness is available in consulted sources.
J) Funding sources: USAID, World Bank, and UNDP.
K) Reference materials and main source(s) of information for summary: Moulton, Mundy, Welmond, and Williams (2001).
L) Potential scalability or replication in different contexts: the program ended in 1995 after the universal elimination of school fees in Malawi. Currently a similar program is under implementation, not without some difficulty, to provide waivers for girls in secondary education. This program is

replicable in countries that have sharp gender differentials in primary schooling enrolment and undergo overall reforms to increase female participation in education.

4.3- Interesting Interventions in Household Demand for Basic Education

Several interventions reviewed for this survey in education sector reform and school effectiveness include a grant or subsidy component for poor families. The Balochistan Education Reform in Pakistan includes an in kind transfer for female students to address the severe gender inequalities of the region. The transfer program is implemented by the World Food Program and consists of a 5 liter tin of vegetable oil per month to the family of each female student who attended school for a minimum of 20 days.[32] The NEU program in Guatemala has a subsidy for girls that has increased both girl enrolment and completion in the rural areas (Eduque a la Nina). Conditional cash transfers are being replicated in Africa through the MISA pilot project.

Some interventions to reduce child labor are based on strong education demand tools. The program Superemonos in Colombia shows promising results. Another interesting child labor program with an education demand component is the FONABE in Costa Rica[33]. MAYA in India has developed temporary short-term and long-term non-formal education programs for child workers who drop out of school or have never attended school. These programs build a bridge to formal school enrolment after graduation (in 2002, over 1240 working children went back to school).

V) FOCUSING ON STUDENT'S PREPARATION AND HEALTH

Initiatives designed to increase students' ability to learn include a variety of early childhood education programs, as well as school feeding (a healthy meal early in the day) and school based health programs. Some of these interventions are part of school demand programs (Progresa's health component for instance), education reform programs, or programs to increase school effectiveness. These interventions are substantiated on years of solid research about early child development and the impact of health and nutrition on learning. In recent years, development agencies have put special attention to reaching children at the earliest possible stage combining some of these programs with maternal care programs. [34]

---

[32] According to the World Food Program (2003) the increase in enrolment for girls was 197 percent. Student attendance and dropout rates were also positively affected.

[33] The Inter-American Development Bank is supporting these programs. For more information go to www.iadb.org.

[34] The World Bank's cumulative lending for Early Child Development programs increased from US$ 100 million in 1990 to approximately US$ 1,100 million in 2000.

School feeding is being implemented in over 100 countries and is reaching large numbers of children. [35] School feeding addresses several Millennium Development goals, in addition to Universal Primary Education, and it can serve as a platform for community participation as well as other interventions (health programs, gender equity, and school quality programs).

5.1- Successful Interventions in Student's Preparation and Health

- **Kenya – Primary School Deworming Program**

A) Name of the Initiative: Primary School Deworming Program

B) Specific aims and objectives: Treatment of intestinal parasites including hookworm, roundworm, whipworm, and schistosomiasis. These parasites are very prevalent among school kids in Kenya's rural areas. The parasites undermine health and productivity (in the case of heavy infections children are constantly tired due to iron and protein deficiency and may feel abdominal pain). Iron deficiency anemia can also cause cognitive problems. The treatment was a dosis of albendazole every six months to all children in the school. The program's ultimate objective is to enhance students' performance. The project was implemented in 75 schools.

C) Operating level : A Dutch non-profit organization (ICS) in cooperation with the Busia Ministry of Health Office implemented the program at the local school level.

D) Geographic focus/context: Rural areas of southern Busia. This area is populated with very poor farming communities that register high rates of intestinal parasites infections.

E) Time period for implementation: 1998-present

F) Outcome or impact information, and/or information from any evaluation: About 30,000 children between the ages 6-10. were treated. The program improved the health of children and reduced school absenteeism by one quarter. However, there is no evidence that deworming increased academic test scores. The program also has cumulative positive externalities and reduces worms and absenteeism in schools located near schools participating in the program.

G) Key of success: - Careful design and evaluation;

- Simplicity of treatment;
- Decentralized implementation.

H) Assessment of quality of information / limitations of the methods and/or data: High quality systematic impact evaluation study using randomized trials. Evaluation was imbedded in the design of the intervention from the beginning.

I) Cost/Cost-effectiveness: Deworming is considerably more effective to increase school participation than alternative methods such as school subsidies in areas where parasites are widely prevalent. The cost per additional year of school participation using deworming is only $3.50.

J) Funding sources: Internationaal Christelijk Steunfonds Africa (ICS).

[35] The World Food Program school feeding programs alone covered 15.6 million children in 64 countries during 2002. See World Food Program (2003).

K) Reference materials and main source(s) of information for summary: Miguel and Kremer (2003)

L) Potential scalability or replication in different contexts: This intervention has great potential for scalability and replication in very different contexts due to its simplicity (treat all children with a dose every 6 months), the absence of significant side effects, and its low cost. Similar interventions are taking place in other countries in Africa with the support of several donors (World Bank, World Food Program, the Canadian Government, and UNICEF).

- **Bolivia- Integrated Child Development Project:**

A) Name of the Initiative: Integrated Child Development Project-Programa Integral de Desarrollo Infantil (PIDI)

B) **Specific aims and objectives:** Establishing a national system to deliver comprehensive health , nutrition , and education services to poor children (age range 6 months –6 years). This program helped the Bolivian government improve its institutional capacity to improve delivery mechanisms. The delivery mechanism was non-formal through home visits or at centers and day care facilities.

C) Operating level : Central Government.

D) Geographic focus/context: Large urban areas in Bolivia.

E) Time period for implementation: 1994-2000

F) Outcome or impact information, and/or information from any evaluation: Improved physical, intellectual, and social development of more than 100,000 children. The program trained 21,000 caregivers and 10,000 parents.

G) Key of success:

- Institutional capacity building;
- Involvement of parents;
- Careful design and evaluation.

H) Assessment of quality of information / limitations of the methods and/or data: High quality report. Net impact on children's performance is not available.

I) Cost/Cost-effectiveness: Total cost was US$ 140.2 million.

J) Funding sources: Government of Bolivia and World Bank.

K) Reference materials and main source(s) of information for summary: World Bank (2001).

L) Potential scalability or replication in different contexts: Successful replication depends on institutional capacity-building in the health and education sectors.

5.2- Promising Interventions in Student's Preparation and Health

- **KENYA -School Meals**

A) Name of the Initiative: Subsidized School Meals

B) Specific aims and objectives: This program was implemented in pre-schools with the objective of improving nutrition and education

achievement of young children. A nutritious breakfast (422 calorie porridge) was cooked using local ingredients (protein rich flour , corn oil, sugar, and water) in the school by community members and served every morning . Parents took turns supervising the preparation and delivery of the meal.

C) Operating level : The NGO ICS implemented the program at the local level.

D) Geographic focus/context: Rural western Kenya (Busia and Teso Districts). This area has very high levels of poverty and malnutrition with 39% of child stunting. This area registers very low levels of enrolment in pre-school . The area also experiences significant equity and quality challenges towards universal primary education.

E) Time period for implementation: 2000-2002

F) Outcome or impact information, and/or information from any evaluation: The program covered 25 schools and increased participation by 30%. Improvements on test scores thanks to the meals were realized only in schools with well- trained teachers. In these schools, test scores improved significantly due to the school meals. Unfortunately, the program also created overcrowding the classrooms of pre-schools that participated in the program.

G) Key of success:

- Highly nutritious meal using local ingredients;
- Community involvement in the administration, supervision, and preparation of meals;
- High levels of accountability to the community.

H) Assessment of quality of information / limitations of the methods and/or data: High quality evaluation using randomized trials. Evaluation methods were imbedded in the intervention design.

I) Cost/Cost-effectiveness: No information on cost-effectiveness.

J) Funding sources: ICS and households (through increased school fees).

K) Reference materials and main source(s) of information for summary: Vermeersch (2002)

L) Potential scalability or replication in different contexts: Similar school feeding programs have been scaled up and replicated in a variety of contexts with great success.

5.3- Interesting Interventions in Student's Preparation and Health

- **Sesame Street goes to Egypt :** Educational TV Programs can enhance the readiness of pre-school children to learn. In the case of Alam Simsim (the great recreation of "Sesame Street" in Egypt), the program enhances literacy and numeracy skills while promoting gender equality. Gender equality is promoted using positive images of both girls and boys and a leading female character (Khokha). Khokha represents a four year old girl with a passion for learning. Leading Egyptian educators, linguists, and health specialists participated in the development of the program. The program has had a large impact because 96% of households have access to a TV in Egypt.

- **Mexico- Initial Education Program:** This program was a non-formal initiative to educate parents, especially mothers, in the use of appropriate childcare practices at home. Parental knowledge about early stimulation was critical to prepare young children to enroll in school on a timely manner.[36]
- **Eritrea: Integrated Early Childhood Development:** This program's objective is to increase access to high quality services in young children's care, health, and cognitive development. Due to recent border conflicts, Eritrea does not have a satisfactory level of public investment in early childhood development. About 38% of all children who are less than 3 years old are chronically malnourished. This program counts on high level of commitment by the central government and careful program design. One characteristic feature of the program is the inclusion of care for orphans.[37]
- **Bosnia and Herzegovina- Schools for Pregnant Women:** Free pre-natal classes covering nutrition for a healthy pregnancy, preparation for labor, breastfeeding, infant care, and sexually transmitted diseases. Currently the program reaches out to 1070 pregnant women. [38]

VI) CONCLUSIONS

This paper reports as a success the most salient characteristics of an overall intervention for organization purposes. In fact, many successful interventions used *integrated approaches* combining education reform elements with school effectiveness (teacher training in particular or community participation) or household demand elements (BRAC, for example). Early childhood interventions and health interventions also included household demand elements and school effectiveness elements and vice versa (PROGRESA, for example). The use of integrated approaches was observed in both large- scale interventions and small- scale local interventions.

One of the most important limitations of this study is the lack of systematic evaluations and information on cost effectiveness of programs. However, some specific policy lessons can be extracted from the cases examined on each intervention type:

- **Education Sector Reform:** Two successful but opposite approaches coexist. On the one hand, some countries have adopted system-wide top-down reforms that integrate management improvements, decentralization, and finance reform. This approach has been particularly successful in the cases of countries undergoing political transformations (Uganda, for example) or reformers that were able to count on a strong political commitment by the President or the Minister of Education. An appropriate communications strategy, the involvement of different groups as reform agents, and decisive

[36] See World Bank (2001)
[37] World Bank (2001)
[38] For more information about this program see Smith and Wexford (2000)

legislative change (when required) are also keys of education reform success. On the other hand some successful bottom-up education reforms have occurred by increasing the flexibility of the overall system to incorporate small or medium –scale local innovations that have high potential for replication and scalability (India Districts Reforms and Balochistan Province Reforms).

- **School Effectiveness:** increasing community participation, especially direct parental involvement in school governance leads to great results. Several effective teacher- training models can be successful depending on the context. However, high impact training programs were a long- term ongoing process and offered teachers a support network. New technologies can be effectively used to enhance school effectiveness or to provide training to teachers.
- **Household Demand for Basic Education:** these interventions tend to have a very significant impact and be very cost effective. Effective targeting is the most important key to success in this type of intervention. Another important policy lesson from these experiences is their efficient and accountable management. Governments implementing these transfers successfully counted on pre-existing institutional capacity to reach remote areas.
- **Health and student preparation:** these interventions can have a high impact on student performance. Successful implementation of health and nutrition programs in schools depends on effective diagnosis, simplicity of treatments, and effective targeting. Successful implementation of early childhood development programs depends at large on the institutional capacity of the health and education system and the provision of maternal health.

Each policy intervention type has its role towards universal primary education, yet most resources from the donor community have been traditionally devoted to finance Education Sector Reforms. Should more resources flow towards specific student preparation, school effectiveness, and household demand programs? The latest trends show an increase in funding of conditional cash transfer programs (or take home food ration programs), early childhood development programs, and school effectiveness programs (with more emphasis on community participation).

The replication of these successful programs poses new education system management challenges. Some cash or food transfer programs bypass the structure of Education Ministries and are implemented by parallel administrative structures or traditional agriculture or food ministries. In other countries, the Ministry of Education, as the main implementing agency, has carried out school feeding and transfer programs with great success. Specific school effectiveness interventions have implied innovations in the governance of Education Institutions (teacher unions and school governance bodies for example).

In summary, the Millennium Project Task Force on Education and Gender Equality should consider in its recommendations not only the nature of successful education interventions but also the challenges that

these innovative policies create for the allocation of donor's resources and education systems in developing countries.

VII) REFERENCES

Agarwal, S. and Hartwell, A. (1998). "Childscope: A Child-School-Community Project in Ghana."Evaluation Database. GHA 1998/005. UNICEF. Available at: www.unicef.org/evaldatabase

Ahmed A. and Del Ninno C. (2001). "Food for education program in Bangladesh: An Evaluation of its Impact on Educational Attainment and Food Security". Working Paper. International Food Policy Research Institute. September.

Ahmed, A. and Billah, K. (1994) "Food for Education Program in Bangladesh: An Early Assessment". Manuscript No. 62. International Food Policy Research Institute. Dhaka.

Alajami, A.N., Al-Dubaie, A.S., Al-Meikhalafy, M.H.(1997). "The Hamlet Girls'Schools Project." Evaluation Database. YEM1997/012. UNICEF. Available at: www.unicef.org/evaldatabase

Angrist, J. , Bettinger E., Bloom E., King E., and Kremer, M. (2001). "Vouchers for Private Schooling in Colombia: Evidence from a Randomized Natural Experiment". NBER Working Paper Series. Working Paper 8343. Available at: www.nber.org/papers/w8343

Anzar, U. (1999). " Education Reforms in Balochistan, 1990-1998: A Case Study in Improving Management and Gender Equality in Primary Education". Working Paper. Education . The World Bank.

Basic Education Coalition (2003). "Ethiopia: Empowered Communities Learn the Value of their Daughters". http://www.basiced.org/stories/ethiopia1.php 05/06/2003.

Basic Education Coalition (2003). " Support to Uganda Primary Education Reform". http://www.basiced.org/stories/uganda1.php 05/06/2003.

Bray, M. (1996). " Decentralization of Education : Community Financing". Directions in Development. The World Bank.

BRAC Education Program (2003). www.brac.net/education 04/28/03.

Bruns, B. and Drabble M. (2000). " Education Reform: Global Trends and Lessons". Presentation . Human Development Network. The World Bank.

Contreras D. (2002). " Vouchers , School Choice, and the Access to Higher Education". Center Discussion Paper No. 845. Economic Growth Center. Yale University.

Corrales, J. (1999). "The Politics of Education Reform: Bolstering the Supply and Demand; Overcoming Institutional Blocks". The Education Reform and Management Series. Vol 2. No 1. The World Bank.

Craig, H., Kraft, R., and Plessis, J. (1998) ." Teacher Development: Making an Impact." USAID: Advancing Basic Education and Literacy Project. World Bank: Human Development Network. Available at:www.worldbank.org/education.

De Andraca, A. M. (2003). Buenas Practicas para Mejorar la Educacion en America Latina. PREAL. Santiago de Chile.

Delannoy, F. (2000). "Education Reforms in Chile, 1980-1998: A Lesson in Pragmatism". Education Reform and Management Publication Series. Vol1. No.1. World Bank. Available at: www.worldbank.org/education

Dewees, A. (2001). "An Economic Analysis of the COPE Program in Uganda: Current Costs and Recommendations for Meeting the Educational Needs of Disadvantaged Children."Evaluation Database. UGD 2001/001. UNICEF. Available at : www.unicef.org/evaldatabase

Ferreira, F. (2001). "An Assessment of the Bolsa Escola Program: Notes". The World Bank.

Fiske, E. (1996). " Decentralization of Education : Politics and Consensus". Directions in Development. The World Bank.

Fuller, B. and Rivarola, M. (1998). "Nicaragua's Experiment to Decentralize Schools: View of Parents, Teachers, and Directors." Working Paper Series on Impact of Education Reforms. No. 5. The World Bank.

Galasso, E. and Ravallion, M. (2001). "Decentralized Targeting of an Anti-poverty Program". Working Paper.

Glewwe, P. (2002). " Schools and Skills in Developing Countries: Education Policies and Socioeconomic Outcomes". Journal of Economic Literature. Vol XL , June 2000, pp. 436-482.

Inter-American Development Bank (2000). "Dominican Republic. Multiphase Program for Equity in Basic Education. Phase I." Loan Proposal. www.iadb.org 05/6/2003.

Ghetea, N. and Vasquez, V. (1999). "Matematica Interactiva para la Educacion Basica : La Experiencia Venezolana con el IRI". Notas Tecnicas de la Unidad de Educacion. Inter-American Development Bank.

Helgesson, L. (2001). "Equality: Girls' and Boys' Basic Education in Masasi and Kisaware Districts."Evaluation Database. TNZ 2001/029. UNICEF. Available at: www.unicef.org/evaldatabase.

Kim, J., Alderman H., and Orazem, P. (1998). "Can Cultural Barriers Be Overcome in Girls' Schooling? : The Community Support Program in Rural Balochistan." Working Paper Series on Impact Evaluation of Education Reforms. Paper No. 10. Development Research Group. The World Bank.

King, E., Rawlings L., Gutierrez M., Pardo, C. , Torres, C. (1997). " Colombia's Targeted Education Voucher Program: Features, Coverage, and Participation". Working Paper Series on Impact Evaluation of Education Reforms. Paper No. 3. Development Economics Research Group. The World Bank.

Levine, R. Birdsall, N. Ibrahim, A. and Dayal, P. (2003). "Achieving Universal Primary Education by 2015". Background Paper for the Millennium Project Task Force.

Miguel, E. and Kremer, M. (2003). "Worms: Identifying Impacts on Education and Health in the Presence of Treatment Externalities." Working Paper. Harvard University.

MAYA (2003). Annual Report. http://www.mayaindia.org 06/01/03

McMeekin, R. (2000). "Implementing School-based Merit Awards: Chile's Experience." Education Reform and Management Publication Series. Vol 3.No. 1. The World Bank.

Morley, S. and Coady, D (2003). From Social Assistance to Social Development: Targeted Education Subsides in Developing Countries. Washington DC. Center for Global Development and International Food Policy Research Institute.

Moulton, J. with Mundy, K., Welmond M., and Williams J. (2001). "Paradigm Lost? The Implementation of Basic Education Reforms in Sub-Saharan Africa". Technical Paper No. 109. Office of Sustainable Development/ Bureau of Africa. USAID.

Patrinos, H. and Ariasingam, D. (1997). " Decentralization of Education: Demand Side Financing". Directions in Development. World Bank. Available at: www.worldbank.org/education

Perris, L. (1998). " Implementing Education Reforms in New Zealand: 1987-1997". The Education Reform and Management Series. Vol 1. No. 1. The World Bank.

Pineros, L. and Rodriguez A. (1999). " School Inputs in Secondary Education and their Effects on Academia Achievement: A Study in Colombia." Human Development Department. LCSHD Paper Series. No. 36. The World Bank.

Programa de Promocion de la Reforma Educativa en America Latina y el Caribe (PREAL) (2003). " Desarrollo de la Educación en Sectores Rurales." Serie Mejores Practicas. Ano 5 No. 13.

_____ (2002). " Sistemas Probados: Evaluacion de los Aprendizajes en Chile y en Brasil." Serie Mejores Practicas. Ano 4. No. 11. Available at: www.preal.cl

_____(2000). "Nuevas Formas de Financiamiento de la Educación". Serie Mejores Practicas. Ano 2. No 4. Available at: www.preal.cl

_____ (1999). " Autogestion Escolar: Aumento de la Cobertura Educacional en Zonas Rurales Pobres." Serie Mejores Practicas. Ano 1. No. 2. Available at :preal.cl

Ravallion, M. and Wodon, Q. (1999). "Does Child Labor Displace Schooling? Evidence on Behavioral Responses to an Enrolment Subsidy." World Bank Policy Research Working Paper 2116 .

Research Triangle Institute (2003). "Overhauling the Basic Education System in Ethiopia". http://www.rti.org 05/12/2003

Sarti Malone, T. and Haihambo-Muetudhana, C. (2002). "Kavango Girls' Education Project and Omaheke San Education Project." Evaluation Database. UNICEF. Available at: www.unicef.org/evaldatabase

Saunders (2000). "Effective Schooling in Rural Africa: Key Issues Concerning School Effectiveness and Improvement." Human Development Network. Effective Schools and Teachers Thematic Group. The World Bank.

Scheerens, J. (1999). " School Effectiveness in Developed and Developing Countries: A Review of the Research Evidence". University of Twente. The Word Bank.

Sharan Pandey, R. (2000). " Going to Scale with Education Reform: India's District Primary Education Program, 1995-1999." Education Reform and Management Publication Series. Vol 1. No 4. The World Bank. Available at :www.worldbank.org/education.

Smith, N. and Wexford, H. (2000). "External Evaluation of the Project Schools for Pregnant Women." Evaluation Database. BHG 2000/011. UNICEF. Available at: www.unicef.org/evaldatabase

Techknowlogia (1999). "Mexico's Telesecundaria". Technologies at Work. www.techknowlogia.org 03/05/03

Uemura, M. (1999). "Community Participation in Education : What Do We Know?". Effective Schools and Teachers and the Knowledge Management System. HDNED. The World Bank. Available at:www.worldbank.org/education

UNESCO (2002). "Education for All: Is the World on Track?" Education for All Global Monitoring Report 2002. UNESCO. Paris

UNESCO (2003). " Gender and Education for All: The Leap to Equality". Education for All Global Monitoring Report 2003/2004. UNESCO. Paris

UNICEF (2004). "Girls, Education, and Development."The State of the World's Children 2004. UNICEF. New York.

UNICEF (2003). "Accelerating the Pace: Access, Quality, and Sustainability for Girls' Education in Africa."The Sixth Consolidated Report to the Government of Norway on the UNICEF African Girls' Education Initiative.

Vawda, A. , Moock P., Gittinger J. P., and Patrinos H.A. (2001). "Economic Analysis of World Bank Education Projects and Project Outcomes". Policy Research Working Paper No. 2564. Human Development Network. The World Bank. Available at: www.worldbank.org/education

Vermeersch, C. (2002). " School Meals, Educational Achievement, and School Competition: Evidence from a Randomized Evaluation." Doctoral Dissertation. Department of Economics. Harvard University.

Ward-Brendt, M. (2001). "Sesame Street: The Longest Street in the World Runs Along the Nile." Technologies at Work. www.technowlogia.org 04/05/03

West, Edwin (1996). " Education Vouchers in Practice and Principle: A World Survey". Working Paper. The World Bank. Available at: www.worldbank.org/education

World Bank (2003). "Making Services Work for the Poor." World Development Report 2004. Washington, DC. The World Bank.

_____ (2003) b. Effective Teachers. Effective Schooling. www.worldbank.org/education 05/08/03

_____ (2001). A Global Directory of Early Child Development Programs Supported by the World Bank. The World Bank. Washington, DC. Available at :www.worldbank.org/education

_____ (1999). "Rajasthan District Primary Education Project." Project Information Document. http:www4.worldbank.org/sprojects 05/08/2003

_____ (1997) . " El Salvador's EDUCO Program: A First Report on Parent's Participation in School Based Management." El Salvador Evaluation Team. Available at: www.worldbank.org/education

_____ (1996). "Nicaragua's School Autonomy Reform: A First Look." Nicaragua Reform Evaluation Team. Available at : www.worldbank.org/education

World Food Program (2003). Global School Feeding Report. World Food Program. Rome. Available at: www.wfp.org

Annex 2. Data Issues

**Needs introduction **

Enrollment data: The net enrolment ratio (NER) is an overall measure of whether children of school age are actually enrolled in school. It is calculated as the ratio of enrolled children of official school age to the number of children of the same age in the population. The NER provides the best picture of whether children of the appropriate age group are enrolled in the appropriate level of schooling.

At present (2001/2 school year) NER can be calculated for two thirds of countries in the world. The calculation requires data in the three dimensions: year of age x school grade x gender. It also requires population data that are disaggregated by single year of age. Some developing countries still do not have population data of adequate quality. In some developing countries, the age of children at school is rounded up or down to meet the official intake age. Supplementary data or coarser enrolment and population data can in some circumstances be used to create estimates.

In some developing countries the number of over-age or under-age children in any grade can be significant.[1] However those children at primary school who are older or younger than the official school age are not included in NER.

NER measures the effectiveness of a relatively efficient education system, but it does not measure the degree to which an education system includes a backlog of older children who either did not attend school at the official age, or are older than the normal primary age range because they have had to repeat several years of school. The number of such overage children is captured using the gross enrolment ratio.

The gross enrolment ratio (GER) is the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to a given level of education. It measures the total volume of education provided by a system.

GERs of above 100 percent are not uncommon and can indicate that children outside of the official age ranges are attending school. It is not possible to make evaluative judgments about the desirability of such GREs without an understanding of the education system in which they occur. Are the rates high because children are allowed to enter school early; because children who missed out in the past on education are being

[1] In some countries NER will miss 'under age' children who have passed through school and graduated before the expected age for finishing primary school. Though the numbers of such children can be significant in some countries, for most countries they are a very small percentage of the total. Thus for the Arab Region (Figure 1) in 1999/2000 over 69% of children in Lebanon, and 35% of children in Morocco entered school one year later than the official entry age, whereas in the United Arab Emirates almost half the new entrants to primary were one year younger than the official entry age. In Sub-Saharan Africa by contrast only six countries have more than 10 percent of children entering before the official age for entry (though this may be affected by age rounding).

encouraged to catch up; or perhaps because of significant amounts of repetition of school years by children who are not achieving appropriate level of education to move ahead?

Gender parity. The existing gender parity indicator used for measurement at the global level is the absolute ratio of girls to boys. UIS normally tends to use the ratio of the girls enrolment rate to the boys enrolment rate, which takes into account the size of population by gender. A gender parity ratio using NER would have the advantage of being consistent with the MDG enrolment indicator 6. Basing gender parity on absolute enrolment figures gives a better sense of the overall change in enrollment; but basing it on enrolment ratios weights the indicator according to the proportion of boys and girls in the school age population. Disaggregated data to calculate primary education enrolment by gender are available for almost all countries. Gender-disaggregated data on secondary education is less readily available.

Measuring Completion. There are many different candidates for indicators of school completion: survival to grade 5, progression, graduation, attainment of skills and knowledge.

For UIS, completion measures aim to consider the proportion of children who enter education together with the number who move through the school system to "graduate." In other words, the completers are measured as a percentage of the sum of those who complete, those who are of the appropriate age but do not complete in the appropriate year, and those who drop out permanently or never went to school. Completion can be a powerful measure of the degree to which, for any theoretical year of graduation, the appropriate potential graduation cohort has been to school, and moved through to the final year (unless the country concerned has automatic promotion, when inevitably all students either move forward year by year no matter what their abilities, or drop out of school completely.)

Different methods are in use in different regions. Currently there is no cross-national measure of primary school completion which is accepted by countries and which can be measured in a harmonized way across a large number of countries. Different international agencies also employ different methods. Among these are the survival rate to grade 5, primary completion rate and the International Standard Classification of Education Level.

The survival rate to grade 5 measures the percentage of any school cohort that progress regularly through the school from grades 1 to 5. To do this it uses the 'reconstructed cohort' method. This method uses two consecutive years age x grade data, and assumes that 1) dropouts do not return to school, 2) promotion, repetition, and dropout rates remain constant, and 3) these same rates apply to all pupils in a grade including repeaters. These assumptions do not necessarily hold for all countries and levels of education. Nevertheless, short of longitudinal tracking of all students it is an good compromise for measuring how students move through a national education system. Survival rates provide information only on those who enrol; it does not reflect the share of children who do not have access. Survival rates are currently available for only about

forty percent of countries.

The primary completion rate measures the proportion of all children of official graduation age who complete primary school in a given year. It is the total number of students successfully completing (or graduating from) the last year of primary school in a given year (including over-age children who either started late or repeated, divided by the total number of children of official graduation age in the population. Due to the lack of available data on the number of children successfully achieving the end of primary school, the World Bank has sometimes used enrolment in the last year of primary school as a proxy. The primary completion rate captures the share of children who ever complete the cycle. It is not a measure of on-time completion.

A key criticism of this indicator is its lack of international comparability. Completing primary school in one country means having three years of education in one country, 10 years in another. In most countries, the primary education is five or six years (about 45 percent of countries have a six-year primary education cycle; 13 percent have a five-year cycle). In 25 percent of countries, the primary cycle is longer; in 20 percent, it is shorter. The primary completion rate does not incorporate that information.

UNESCO's International Standard Classification of Education (ISCED) addresses this shortcoming. ISCED level 1 specifies that the primary cycle lasts six years. This is meant to correspond to "the beginning of systematic apprenticeship of reading, writing and mathematics; the start of compulsory education; primary education; first stage of basic education." Fixing an harmonised categorisation of 6 years to the primary cycle ISCED increase the comparability of educational outcomes based on the basic skills that children learn during that period. ISCED is now the most important transformation applied to the data by national statisticians, with guidance from UIS.[2] UIS and the World Bank have agreed that the UIS will concentrate on ISCED compatible data, while the Bank will collect data to national standards. The two institutions will share data in a common database hosted by UIS.

Relationships among indicators. Comparison of different indicators across countries provide important international benchmarks. Much more nformation for policy planning can be gleaned by looking at these various indicators in relation to one another.

Completion rates need to be combined with data on enrolment and survival in order to provide a fuller picture of an educational system. Low completion rates may be due to problems in entering school or in progression. High survival rates may suggest a strong educational system, belied by evidence of very low enrolment. With respect to gender disparities, completion rates may under-emphasise girls' difficulties in school by

[2] ISCED was revised in 1997. ISCED 1997 introduced a division of Upper Secondary programmes into ISCED 3A general education, and ISCED 3B technical education. ISCED 4 covering post-secondary, non-tertiary, programmes was also introduced. Primary education cycles (ISCED 1) are largely comparable pre and post 1997, but comparison is very difficult for secondary (ISCED 2 lower, and ISCED 3 upper), which may include programmes which were subsequently classified as ISCED 4 after the introduction of the 1997 classification. UIS is undertaking a major programme of work to evaluate the impact of the 1997 change.

countering poor access with girls' greater staying power once they have entered school. In some countries, for example in the Caribbean, girls' GER may be somewhat lower than those of boys but their completion rates higher. Elsewhere, as in several West African countries, girls' enrolment rates may show only a slight disparity with boys', but girls completion rates are very significantly lower.[3]

Net and gross enrolment rates can also be consistent with a number of different schooling profiles. In the late 1980s, for example, both Brazil and Indonesia had nearly universal access, with close to 100 percent of children starting grade one. However, ninety percent of students completed grade five in Indonesia, compared with sixty percent in Brazil. Net enrolment rates, gross enrolment rates and primary completion rates need not vary in parallel, as illustrated by the following data:[4]

Country	GER	NER	PCR
El Salvador	111	81	80
Mongolia	92	81	66
Togo	115	81	68

The variation between indicators is well-captured by Figure X, providing GRE and completion rates from around the world in 1999. As Bruns et al observe, "…what is significant from an analytical standpoint is not so much that a disparity exists, but that there is no constant relationship underlying the gap."[5]

[figure, Bruns, p 31]

Direct assessment of outcomes. Indicators on enrolment and completion are not necessarily good or consistent predictors of outcomes. A 1999 study of six African nations exhibits a range of relationships. Kenya had the lowest completion rate, at 63 percent, but 65 percent of its sixth-grade pupils achieved minimum literacy skills—a better outcome than in any other country. Malawi's completion rate was almost identical to Kenya's, as 64 percent, yet only 22 percent of its sixth-grade pupils could demonstrate minimum literacy skills. And Zimbabwe, with a completion rate of 113 percent, had only 56 percent of its sixth-graders attaining minimum literacy skills.[6]

Direct assessment of what children have learned in school can be undertaken in a number of ways.

- A national exam system which is designed to assess children against a national standard. This could be acquisition of a national curriculum, or acquisition of sufficient knowledge to move forward to secondary school. Success is sometimes limited to the number of places available in secondary school.

[3] Bruns et al, 2003, p. 32
[4] Bruns et al, 2003, pp. 30, 32.
[5] Bruns, et al, 2003, p. 31.
[6] Ellis, 2003, p. 9.

- A national learning assessment. Rather than testing children against a certain standard this kind of test involves assessing directly what skills children have acquired.
- An international assessment. This is a test that is controlled to test equivalent skills acquisition across a group of countries, so that countries may benchmark themselves against each other or a regional average. Comparability is assured by taking into account the relevant national and sub-national cultural context.

The most robust test of acquired learning, which provides international comparability is a full international learning assessment such as the OECD's Programme for International Student Assessment (PISA), System for the measurement of Educational Quality (SIMCE, developed in Chile), or SACMEQ in southern Africa. Such tests, however, are very resource-intensive for both their organization and subsequent analysis. It is unlikely that they can be undertaken often or, that they will be fully comparable at the global level because of difficulties in building a test that covers all cultural differences in the interpretation of questions, and because many countries will not have the capacity for the required rigorous in-depth analysis of the results. Testing also raises the prospect of reducing the output of schooling to the ability of students to answer questions on standardized examination, and of providing incentives to teachers to simply "teach to the test."[7]

[7] On the historic nature of this concern, see WDR 2004, p. 119.

UN Millennium Project Task Force on Education and Gender Equality

Major global/regional initiatives to promote Millennium Development Goals on Education and Gender Equality

Prarthna Dayal
Center for Global Development
June 2003

Declarations affirming universal education and gender equality

- Universal Declaration of Human Rights, 1948
- Convention on the Elimination of all forms of Discrimination against Women (CEDAW), 1979
- Convention on the Rights of the Child, 1989
- World Conference on Education For All, 1990 (Jomtien, Thailand)
  - Dakar Framework of Action, 2000
- World Summit for Children, "World Declaration on Survival, Protection and Development of Children," 1990
  - "World Fit for Children", 2002 (at special session for children at UN headquarters in New York)
- Millennium Development Goals, 2000

Civil Society Initiatives

ADVOCACY

- Basic Education Coalition
- Global Campaign for Education
- OXFAM “Education Now!” Campaign

RESEARCH FOCUSED

- The Partnership for Educational Revitalization in the Americas (PREAL)
- Universal Basic and Secondary Education Project (UBASE)

Basic Education Coalition

Group of 16 development organizations that advocate for greater priority to early childhood and primary education in foreign aid programs –currently focusing on U.S Government

Mission: To push the U.S government to increase primary education funding to at least $1 billion by 2006, with an initial increase of $100 million in 2003

- Strategically focusing on urging U.S. government to announce major education initiative in the 2004 G-8 meeting
- Currently developing USAID education strategy on basic education
- Conducting outreach activities with U.S. Congressmen

Planned Research: Examination of 6 success stories

Main Funding: Hewlett Foundation, USAID.

Global Campaign for Education

Global alliance of 400 teacher unions and development organizations in 180 countries

Mission: To mobilize public opinion to urge the donor community and governments to take immediate action to implement EFA

Specific Calls:

- Governments should abolish fees in primary education and increase spending
- Increased debt relief and aid from donor countries
- Increased participation and accountability to civil society in education decision making
- Civil society should keep the pressure on governments and international organizations to deliver on their promise of EFA

OXFAM "Education Now" Campaign

- Focus on keeping pressure on donors to live up to the promise of universal education for all by 2015 by putting the required money on the table
- Current focus is on the EFA-Fast Track Initiative to ensure financial support for qualified countries from the donor community

  SPECIFIC DEMANDS FROM DONORS
  - Solid commitment to 10 qualified EFA-FTI countries of required financial resources to meet universal primary education goals
  - Provision of detailed timetable for Fast Track expansion
  - Agreement to finance recurrent costs such as teacher salaries
  - Commitment to improve donor coordination at the national level
  - Agreement on strategy that guarantees girls equal access to primary education in 2005
  - Agreement to devise a plan to ensure that "non-favorite" countries also receive necessary financing

Universal Basic and Secondary Education (UBASE) Project

Implementing Agency: American Academy of Arts and Sciences

Mission:

- Through high quality research, explore the possibility of providing universal and quality basic and secondary education
- Use research to develop a plan of action
- Advocate for the implementation of plan of action to achieve UBASE

Proposed Timeline of Project: 2001-06

Funding: Hewlett Foundation, American Academy of Arts and Sciences, the Golden Family Foundation, John Reed and Paul Zuckerman

UBASE Project (continued)

Main issues to be explored by research

- Basic facts, including nature and quality of education data
- Intellectual and programmatic history of efforts to achieve universal education: Why have past initiatives failed?
- Consequences of universal education
- Goals of primary and secondary education in different settings (do universal standards exist?) and ways to monitor progress
- Politics of education reform and main obstacles to progress
- Means of delivery and implementation of universal education
- Costs and finance of universal quality basic and secondary education
- Cross-linkages with health

The Partnership for Educational Revitalization in the Americas (PREAL)

Partnership of public and private organizations and individuals from civil society, governments, universities, politics and business to promote better education policies in Central and South America, focusing on primary and secondary education

Implementing Agency: Inter-American Dialogue and the Corporation for Development Research (CINDE)

Mission: To contribute to an informed debate on policy alternatives, identify and dispense best education practices, strengthen private and public organizations working for education reform, and monitor progress towards improving education policy

Evaluate Progress through Education Report Cards for each country of operation

PREAL (continued)

Activities:

- Task Force on Education, Equity, and Economic Competitiveness examines the state of education and develops practical recommendations for change
- Regional working groups, workshops and conferences examining education policy issues and policy alternatives
- Research on neglected education reform issues
- Support to national advocacy groups promoting dialogue on education reform
- Publications disseminating best practices

Funding: USAID, Inter-American Development Bank, GE Fund, Tinker Foundation, Swedish International Development Agency, the Canadian International Development Research Centre, Avina Foundation, Global Development Network

Established in 1995

Regional Initiatives

Civil Society

AFRICA

- FAWE
- ANCEFA

LATIN AMERICA

- PREAL
- Fe Y Alegria
- LABES (partnership between government, civil society and private sector)

United Nations (UNICEF)

AFRICA

- African Girls Education Initiative
- Sara Communications Initiative

SOUTH ASIA

- Meena Communications Initiative

Description of regional initiatives

Forum of African American Educationalists (FAWE)

Network of NGOs across the continent of Africa to advance goal of girls' education. It has 33 national chapters that work on identifying priority action areas and implementing possible solutions. Build consensus, provide technical assistance and build knowledge base.

The Africa Network Campaign on Education for All (ANCEFA)

Regional network of civil society organization and national coalitions in 23 African countries to promote and advocate the access to free quality education for all. Main purpose is coordination, and advocacy and NOT implementation. Main activities are consensus building, lobbying, knowledge sharing, research, capacity building and monitoring of progress towards EFA goals.

UN African Girls' Education Initiative

Implemented by UNICEF and mainly funded by the Norwegian government, it works in 34 African countries to promote the goals of gender parity and improving quality of education. Focus on facilitating cooperation between donors and governments, development of country policies on girls' education and monitoring and evaluation.

Regional Initiatives (continued)

The Latin America Basic Education Summit (LABES)

Unique partnership program between governments, private sector (business leaders), and civil society in Latin America to address basic high quality education needs in the region. Main purpose is to build political commitment for education reform in teacher training, integration of modern technology and learning achievement.

The Meena Communications Initiative is implemented by UNICEF and funded by the Norwegian government. Main aim is to create change in social attitudes towards education of girls in South Asia. This initiative seeks to create demand amongst communities to address gender equality in education. It is a media campaign composed of a 14-part animation series depicting the life of a South Asian girl and her struggles.

The Sara Communications Initiative is similar to the Meena initiative but implemented in Southern and Eastern Africa.

Major Bilateral Agency Initiatives

- Canadian International Development Agency (CIDA)
- United States Agency for International Development (USAID)
- UK Department for International Development (DFID)

Canadian International Development Agency (CIDA)

Basic education one of CIDA's four priority areas.

- Funding for basic education increases from $41 million in 1999-00 to $164 million in 2004-05, a total five-year investment of $ 555 million.
- Broad definition of basic education: need- and rights-based, include life skills and basic adult education.

CIDA (continued)

Action Plan on Basic Education

1. GOALS

- Access to free and compulsory primary education by 2015
- Elimination of gender disparity in primary and secondary education
- Improving the quality of basic education

2. KEY FOCUS AREAS

- Strengthen education systems and capacity of local stakeholders
- Girl's education
- Build political will and public support
- Improve donor collaboration and coherence
- Build on demonstrated results.

3. KEY ACTIONS

- Improve access to quality education, improve quality of classroom instruction and enhance teacher training
- Improve and integrate strategies for gender equality
- Strengthen HIV/AIDS programs
- Support good educational governance and management and strengthen civil society
- Promote use of information and communication technologies
- Build donor coherence and coordination.
- Monitor progress using available standards and indicators.

United States Agency for International Development (USAID)

- Funding for basic education to reach $250-$280 million in FY 2003
- Currently providing assistance to approximately 35 countries
- In 2001, 58% of funding for basic education went to Africa

USAID (Continued)

Strategic Objective for Basic Education

- Help nations develop comprehensive policies for improved learning and universal completion of basic education
- Improve access for girls and disadvantaged populations
- Improve education data and collection
- Help develop cost effective adult literacy and early childhood education programs

USAID (continued)

Specific Activities in Education

- Strategies for Advancing Girls' Education (SAGE) –Global focus
  - Mobilize leadership to promote girls' education and broaden and support local community initiatives to overcome barriers to girls' education
  - Improve knowledge of barriers to girls' education for better strategies and programs to improve participation
- Basic Education and Policy Support (BEPS) – Global focus
  - Help in improving access to, quality, management and effectiveness of education systems
  - Support education policy dialogue and reform
- DHS EdData (Guinea, Uganda, Malawi, and Zambia)
  - Conduct education surveys linked to DHS survey
  - Build country capacity to collect, analyze and use education data
- Advanced Basic Education and Literacy II(ABEL 2)
  - Short and long-term technical assistance and capacity building within education ministries and local schools
  - Assist in strengthening policy reform process, increase participation of girls and enhance use of technology

UK Department for International Development (DFID)

Strategy for Universal Primary Education

Identified three action priorities:

1. Contribute to and strengthen international commitment and coordination to achieve Education for All
2. Invest in strong, well-targeted country programs, especially in sub-Saharan Africa and South Asia
3. Support knowledge and research strategies that will disseminate lessons learnt, share experience and monitor progress

DFID (continued)

Specific Priorities for Governments and Civil Society

- Strong political commitment
- Free provision of primary education and increased resources
- Understand and strengthen demand for education
- Action on HIV/AIDS
- Harness technology
- Improve quality of education
- Implement sector-wide, integrated approaches to education

Specific Priorities for International Community

- Increase resources and dispense these resources more effectively
- Coordinate efforts amongst donors
- Promote information and knowledge sharing
- Support efforts to strengthen existing data systems to monitor progress

DFID (continued)

Specific Commitments: DFID Public Service Agreement 2001-04

Targets in top 10 recipients (Bangladesh, China, Ghana, Malawi, India, Pakistan, South Africa, Tanzania, Uganda, and Zambia)

- Average increase in primary school enrollment from base of 75% in 2000 to 81% in 2004.
- Development of basic monitoring and evaluation mechanisms and their integration into education sector strategies by 2004 in at least 8 of the 10 countries.
- By 2004, 75% of bilateral commitments will support multi-donor programs and implement government-agreed sector strategies.
- Improve gender equality in education especially primary education from base data of 86% (Currently ahead of target at 91%).
- Adopt and implement education sector strategies that explicitly address equitable access for boys and girls by 2004.

Selected Bilateral Donor Assistance for Basic Education and Gender Equality, 2001

Donor Country	Basic Education ($ millions)	Women in Development ($ million)
Australia	$ 31.67	$ 1.49
Canada	$ 43.98	NA
Denmark	$ 6.16	$ 4.25
France	$ 185.94	NA
Germany	$ 43.23	$ 5.07
Japan	$ 80.37	$0.31
Netherlands	$ 166.72	$11.45
Norway	$ 15.44	$ 9.83
Spain	$ 15.73	$ 10.74
Sweden	$ 5.5	NA
United Kingdom	$ 67.56	$ 1.8
United States	$ 205.14	$ 11

Source: OECD, Development Assistance Committee (DAC) Online database.

UN–led Global Initiatives

- UN Girls' Education Initiative (UNICEF)
- 25 x 2005 –Accelerating progress in Girls Education (UNICEF)
- Education for All (UNESCO)
  - EFA Global Monitoring Report
- EFA-Fast Track Initiative (UNESCO and World Bank)
- Global Movement for children

UN Girls' Education Initiative

Goal

To mount a 10-year sustained campaign to improve quality and availability of girl's education through a collaborative partnership with entities within and outside the UN system.

Lead UN Agency

UNICEF

UNGEI (continued)

STRATEGIC OBJECTIVES

- Building political and resource commitments at the highest levels
- Ending gender gap in 52 countries with gender gap at primary level of more than 5%
- Ending gender bias and discrimination within education systems
- Assisting in girl's education in crisis, conflict and post-conflict situations
- Ending ingrained gender bias that limits demand for girl's education

GUIDING PRINCIPLES

- Building on existing strategies and mechanisms to develop country level plans of action, such as EFA plans, PRSPs, SWAPs, national assessment teams, CCA/UNDAF, etc.
- Building collaboration between partners within the UN system.
- Framework that builds on the strategic strengths of each partner and converts it into an organized collaborative effort.

25 x 2005-Accelerating Progress in Girls' Education

Goal

To maximize the number of girls in school by 2005, by focusing on the highest-risk countries, which have low girls enrollment rates and high gender inequality

Rationale

- Based on the rights approach as adopted in the Convention on the rights of the Child (CRC) and the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW).
- To supplement efforts already in place by partnering with existing initiatives such as the Fast-Track Initiative, the UNGEI and the AGEI

Cost and Financing

Projected resource flows to the normal girls' education strategy is $193 m per year by 2005. For the acceleration strategy much more than this is anticipated

Lead Agency

UNICEF

25 x 2005 Initiative (continued)

Elements of Strategy

Intensively use the existing knowledge on best practices in a focused and proactive way

- Advocacy at the national and international level
- Long-term technical assistance, in addition to mere funding
- Partnering with existing initiatives and organizations in planning, coordination and service delivery
- Focus on an inter-sectoral approach and use measures to address HIV/AIDS to achieve education results

25 Proposed Countries**

Afghanistan, Bangladesh*, Benin, Bhutan, Bolivia*, Burkina Faso*, CAR, Chad, DRC*, Djibouti, Eritrea, Ethiopia*, Guinea*, India*, Malawi, Mali, Nepal, Nigeria*, Pakistan*, Papua New Guinea, Sudan, Tanzania*, Turkey, Yemen*, Zambia*.

25 x 2005 Initiative (continued)

Targets to be achieved in the 25 countries

- At least 30% reduction in out-of-school girls by 2005 Improved retention and completion rates for girls
- Improved performance by girls in learning achievement
- Demonstration of robust and sustainable achievements in the education systems (as measured by effective evaluations)

Deliverables

- Analytical and data input into the EFA monitoring report by UNESCO
- Other analytical work such as country case studies on impact of interventions, synthesis and review of studies on girls education since Jomtien in 1990, and technical papers on experience of the acceleration strategy
- Compilation and production of “greatest hits” advocacy messages on girl’s education over the last 20 years
- Collection in words and pictures of messages and remarks by girls who have been helped through the acceleration strategy

Education for All (UNESCO)

Global commitment endorsed by the international community at the World Education Conference in Jomtien, Thailand in 1990 in recognition of the importance of achieving universal education in this millennium.

Reaffirmed at the World Education Conference at Dakar in 2000, with the adoption of the Dakar Framework of Action, which specified six particular education goals to be achieved.

International Task Force on EFA

Set up to develop a comprehensive strategy to operationalize Dakar Framework of Action by March 2002. Identified five major action areas:

1. EFA planning: plans to include civil society participation, in context of poverty reduction and entire education sector
2. Advocacy: active advocacy and national and international level
3. Finance: First primary education, then other Dakar goals
4. Monitoring and Evaluation: reinforce national systems, improve indicators and publish EFA Monitoring Report
5. International and regional mechanisms: strengthen inclusive national EFA forums as place of policy formulation, focus work of EFA working Group and High Level Group at international level

EFA (continued)

- **EFA Global Monitoring Report**

Established to ensure accountability and implementation of pledges made at the World Education Forum (2000) in Dakar, and to measure progress towards the six EFA goals outlined in the Framework of Action.

Theme for 2003 Report: Gender and Education for All

Independent Report commissioned by UNESCO

EFA-Fast Track Initiative

Initiated as a response to a call in November 2001 by the Development Committee to prepare an action plan to accelerate progress to meet the MDG of universal education.

Goal

- To implement a focused, coordinated and intense effort in a limited number of countries with sound education policies to achieve universal education, as measured by universal primary completion (UPC).
- The aim is to accelerate progress through strengthening national education policies, improved capacity, political commitment, and incremental and coordinated financing resources as a result of partnerships between donors and developing countries.
- To mobilize resources towards the achievement of the goal.
- Purpose of the pilot program is to yield results and success stories that can be replicated, as well as contribute to the knowledge of what works.

Lead Implementing Agency

The World Bank

EFA-Fast Track Initiative (continued)

18 + 5 countries selected based on two conditions

- Had full PRSPs by August 2002
- Had sector-wide plans for education agreed with donors

Countries

Albania, Bolivia, Burkina Faso, Ethiopia, Gambia, Ghana, Guinea, Guyana, Honduras, Mauritania, Mozambique, Nicaragua, Niger, Tanzania, Uganda, Vietnam, Yemen, Zambia + Bangladesh, Congo, India, Pakistan and Nigeria.

Themes/Prerequisites

- Coordination with existing plans and strategies such as PRSPs and national education sector plans
- Country ownership: require country proposals on strategy to achieve UPC by 2015

No money has been disbursed as yet, even though 12 countries out of the 18 have submitted proposals

Multilateral/Regional Bank Initiatives

- World Bank
- Inter-American Development Bank
- Asian Development Bank
- African Development Bank

World Bank

- Commitment to EFA and lead agency for implementation of EFA Fast-Track Initiative
- Important component of work on education is research, knowledge generation and dissemination
- At end of March, 2003, approximately $10 billion committed to education projects, of which half was for the primary level.
- Focus on
  - Poor countries
  - Policy reform, quality, learning achievement rather than infrastructure
  - Country ownership and partnership with various in-country players
  - Harmonization of education policies with other donors and sector plans

Inter-American Development Bank

- Focus mainly on education reform to increase effectiveness, coverage and equity
- In 2002, $115 million was disbursed in the education sector, however breakdown by level is not available.
- Affirm support of Millennium Development Goals and their integration into IDB strategy and goals.

Asian Development Bank

- Shift in policy since 1991 to focus more on basic education and within that on teacher training, curriculum development and education planning.
- Between 1991-2001, basic education accounted for 41 percent of ADB education lending. Total amount to basic education in 10 years = $1.58 billion.
- Endorse support for Education For All (EFA).
- Main focus: enhancing equity and access, improving quality, strengthening management, mobilizing resources, initiating partnerships and application of new technologies.
- Main goal is to promote education policies that lead to poverty reduction.
- Attempt to incorporate gender within education strategies

African Development Bank

Priority areas within education is quality basic education

Priority actions:

- Improved equity and access
- Quality
- Improved management and decentralization
- Improved financing mechanisms

Affirm support to:

- Sector-wide approach
- Participatory approach
- Donor coordination