



Financing the Education 2030 agenda

Key issues and challenges for national planners

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Part I: An overview to the Global Education Monitoring Report

Part II: Pricing the right to education

Part III: Challenges for national planners

Part I

An overview to the Global Education Monitoring Report



Background: the Global Education Monitoring Report

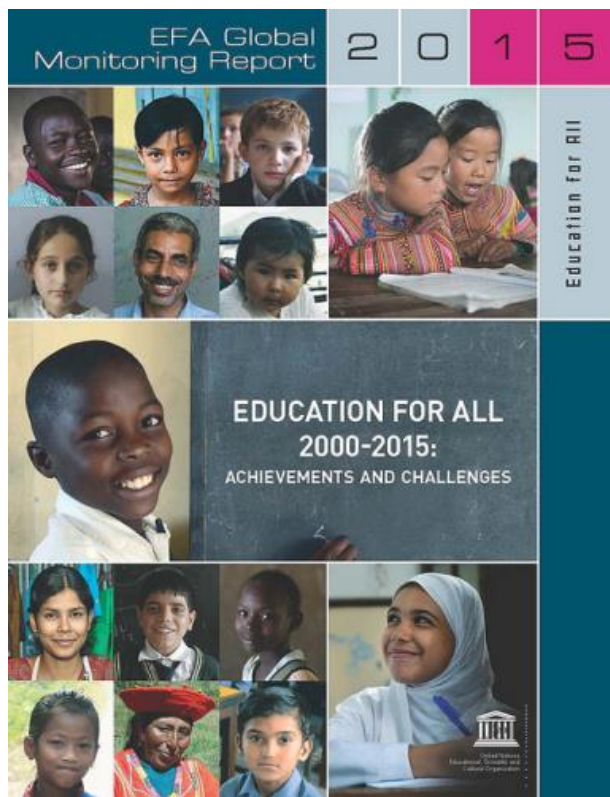
2002-15: 12 Education for All Global Monitoring Reports (GMR) published*

- ✓ Since 2002, over **160,000** copies of the GMR (Full and Summary) distributed in at least 6 languages, with Summaries translated in many other languages
- ✓ Total web downloads have reached over **700,000** (as of December 2015)
- ✓ Most recent 2015 GMR launched in over 60 events with media coverage in over 100 countries
- ✓ The GMR team has increasingly targeted new audiences with more focused publications, all by-products of the main report:
 - 63** Regional overviews: en.unesco.org/gem-report/regionalresources
 - 3** Gender summaries
 - 2** Youth reports
 - 29** Policy papers and brochures: en.unesco.org/gem-report/policy-papers
 - 3** Technical papers: en.unesco.org/gem-report/technical-papers

* In 2016, the EFA Global Monitoring Report (GMR) was officially relaunched as the Global Education Monitoring Report (GEM Report). The change reflects the Report's new mandate monitoring progress towards the new global education goal and targets in the Sustainable Development Agenda.

Key statistics for the 2015 Report

2015 Full Report and Summary in all UN languages



Full and Summary Reports available in:

- ✓ Arabic
- ✓ Chinese
- ✓ English
- ✓ French
- ✓ Russian
- ✓ Spanish

Summary also available in:

- ✓ German
- ✓ Hindi
- ✓ Japanese
- ✓ Portuguese
- ✓ Swahili
- ✓ Thai
- ✓ Urdu

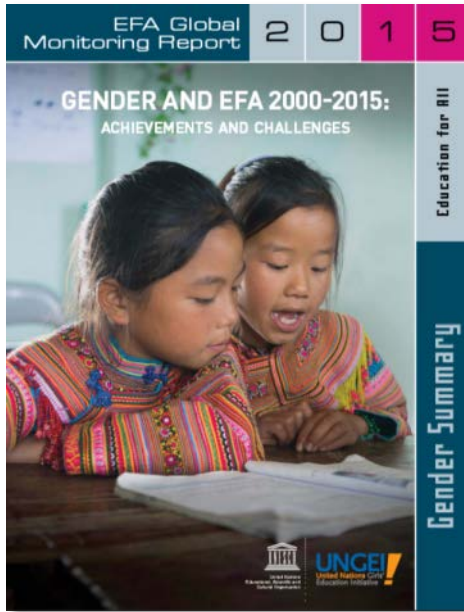


The 2015 GMR was downloaded **84,620 times** (missing one month of data – April! -- due to glitch in UNESCO reporting system)



3,850 tweets during launch week with a reach of **56.4 million**

2015 Gender Summary and Youth Report



The Gender Summary has been downloaded **15,271 times**



450 media articles were published



Our Twitter hashtag reached **50 million people in first 5 days**

- ✓ Released on International Day of Girl Child at UNICEF headquarters in New York
- ✓ Also launched at UNESCO General Conference, and at event organized by Save the Children



Save the Children



- ✓ Available in English, Chinese, French and Spanish
- ✓ India-based Youth Ambassadors for *A World at School* organised youth event to launch the report in New Delhi
- ✓ Distributed at youth advocacy meetings around the world

 **A World at School**

Education 2030: a new mandate



Mandate: “The GEM Report will be the *mechanism for monitoring and reporting on SDG 4* and on education in the other SDGs, with due regard to the global mechanism to be established to monitor and review the implementation of the 2030 Agenda for Sustainable Development.

It will also *report on the implementation of national and international strategies* to help hold all relevant partners to account for their commitments as part of the overall SDG follow-up and review.”

Education 2030 Framework for Action



Policy papers in 2015

Eight policy papers released on : teacher shortages, humanitarian aid, out-of-school children, school-related gender based violence, equity, and costs of new targets.



30,000 downloads in 2015

Education for All Global Monitoring Report
Policy Paper 16
February 2015

This paper will be discussed at the Education for All (EFA) Summit in Addis Ababa, Ethiopia, on 20-21 February 2015. It is the first of a series of policy papers that will be released in 2015 to support the EFA Summit.

Where do the proposed education targets fall short?

Introduction

The Education for All (EFA) Summit in Addis Ababa, Ethiopia, on 20-21 February 2015, will be a landmark event in the history of global education. It will bring together heads of state and government, ministers of education, and other leaders from around the world to discuss the progress of EFA and to set new targets for 2030. This paper examines the proposed targets and identifies areas where they fall short.

Targets need to be specific and clear

The proposed targets are too vague and unclear to be effective. They do not specify the quality of education, the equity of access, or the sustainability of the system. They also do not take into account the needs of the most vulnerable children.

Some targets are not achievable

Some of the proposed targets are not achievable given the current trends and the limited resources available. For example, the target to achieve universal primary education by 2015 is not realistic.

Education for All Global Monitoring Report
Policy Paper 17
March 2015

School-related gender-based violence is preventing the achievement of quality education for all

Introduction

School-related gender-based violence (SRGV) is a global problem that is preventing the achievement of quality education for all. It is a form of violence that occurs within the school environment and is often linked to gender inequality and discrimination.

SRGV is a global problem

SRGV is a global problem that affects children and young people in all countries. It is a form of violence that occurs within the school environment and is often linked to gender inequality and discrimination.

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Education for All Global Monitoring Report
Policy Paper 18
July 2015 update

Pricing the right to education: The cost of reaching new targets by 2030

Introduction

The right to education is a fundamental human right. It is the right of every child to have access to quality education. This paper examines the cost of reaching the new targets for 2030 and identifies the challenges that will be faced.

The cost of reaching new targets by 2030

The cost of reaching new targets by 2030 is estimated to be \$1.5 trillion per year. This is a significant amount of money that will need to be raised from various sources.

Challenges to reaching new targets by 2030

There are several challenges to reaching new targets by 2030. These include the need for more investment in education, the need for more qualified teachers, and the need for more equitable access to education.

Education for All Global Monitoring Report
Policy Paper 19
April 2015

The challenge of teacher shortage and quality: Have we succeeded in getting enough quality teachers into classrooms?

Introduction

Teacher shortage and quality are two of the most significant challenges facing the education system. This paper examines the progress made in addressing these challenges and identifies the areas where more work needs to be done.

Teacher shortage and quality are two of the most significant challenges

Teacher shortage and quality are two of the most significant challenges facing the education system. This paper examines the progress made in addressing these challenges and identifies the areas where more work needs to be done.

Have we succeeded in getting enough quality teachers into classrooms?

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Education for All Global Monitoring Report
Policy Paper 20
July 2015

Education 2030: Equity and quality with a lifelong learning perspective

Introduction

Education 2030 is a vision of a world where every child has access to quality education and where learning is a lifelong process. This paper examines the challenges that will be faced in achieving this vision and identifies the areas where more work needs to be done.

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Equity and quality are the key to achieving Education 2030

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Education for All Global Monitoring Report
Policy Paper 21
June 2015

Humanitarian Aid for Education: Why it Matters and Why More is Needed

Introduction

Humanitarian aid for education is a critical component of disaster response. It is the aid that is provided to children and young people who are affected by conflict and disaster. This paper examines the importance of humanitarian aid for education and identifies the areas where more work needs to be done.

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Why it Matters and Why More is Needed

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Education for All Global Monitoring Report
Policy Paper 22
6-7 July 2015

INVESTING IN TEACHERS IS INVESTING IN LEARNING

A PREREQUISITE FOR THE TRANSFORMATIVE POWER OF EDUCATION

Background paper for the Oslo Summit on Education for Development

Introduction

Teachers are the backbone of the education system. They are the ones who deliver the curriculum and who guide the learning process. This paper examines the importance of investing in teachers and identifies the areas where more work needs to be done.

Investing in teachers is investing in learning

Investing in teachers is investing in learning. This paper examines the importance of investing in teachers and identifies the areas where more work needs to be done.

A prerequisite for the transformative power of education

A prerequisite for the transformative power of education. This paper examines the importance of investing in teachers and identifies the areas where more work needs to be done.

Education for All Global Monitoring Report
Policy Paper 23
July 2015

A growing number of children and adolescents are out of school as aid fails to meet the mark

Introduction

A growing number of children and adolescents are out of school as aid fails to meet the mark. This paper examines the reasons for this and identifies the areas where more work needs to be done.

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The global number of children and young adolescents out of school is increasing

The global number of children and young adolescents out of school is increasing. This paper examines the reasons for this and identifies the areas where more work needs to be done.

Part II

Pricing the right to education

Pricing the right to education



Education for All Global Monitoring Report

Policy Paper 18

July 2015 update

This paper shows there is an annual financing gap of US\$39 billion over 2015-2030 for reaching universal pre-primary, primary and secondary education of good quality in low and lower middle income countries.

Pricing the right to education: The cost of reaching new targets by 2030

There is a large financing gap for achieving the post-2015 education agenda

The key findings from the EFA Global Monitoring Report analysis of the cost of meeting key targets of the post-2015 education agenda can be summarised as follows:

- The annual total cost of achieving universal pre-primary, primary and secondary education in low and lower middle income countries is projected to increase from US\$49 billion in 2012 to US\$140 billion, on average, between 2015 and 2030. The total cost will more than triple in low income countries. The projected increase reflects a combination of greater numbers of students and higher per-student expenditure to improve quality and achieve universalisation.
- To improve education quality as envisaged in the post-2015 agenda, spending per student will need to increase substantially. For example, low income countries will need to increase the amount they spend per primary school student from US\$70 to US\$137 by 2030.

- Government spending on education by low income countries, including post-secondary education, will need to increase by 50% as a share of GDP between 2012 and 2030. Even so, domestic resources will not be sufficient to achieve the key education targets by 2030.
- The total annual financing gap between available domestic resources and the amount necessary to reach the new education targets is projected to average \$35.3 billion between 2015 and 2030. The gap is particularly large in low income countries, where it constitutes 42% of domestic GDP.
- Aid will thus remain a crucial source of education finance over the next 15 years if the targets are to be met. Access low and lower middle income countries, donors and for pre-primary, primary and secondary education will need to increase by at least six times.

The post-2015 education agenda is a major opportunity for new financial commitments

Lack of adequate finance was among the most significant obstacles to achieving the Education for All goals. As debate over the post-2015 education agenda reaches the decision point, attention is turning to implementation mechanisms that will allow the new targets to be reached. Ahead of the Oslo Summit on Education for Development and the Financing for Development Conference in Addis Ababa, the EFA Global Monitoring Report has estimated the cost of achieving some of the key new

education targets, and the annual financing gap remaining once available domestic resources are taken into account.¹

The analysis covers all low and lower middle income countries, which face the greatest challenges in education provision and are the most likely to need external assistance. It shows that, without a doubt, substantial new investment is needed if the world is to achieve the key education targets of the post-2015 sustainable development agenda. A analysis carried out as part of the 2015 EFA Global Monitoring Report out in April, shows that ensuring that all children access upper secondary education by 2030 will remain

¹ This policy paper is based on a table of data in the 2015 EFA Global Monitoring Report by the education MDG, tracking education targets in the world's low and lower middle income countries – and the finance gap to 2030 for pre-primary, primary and upper secondary schooling.

Drawn on by:



SUSTAINABLE DEVELOPMENT
SOLUTIONS NETWORK
A GLOBAL INITIATIVE FOR THE UNITED NATIONS



Formed basis of a year-long campaign by:



GLOBAL PARTNERSHIP
for EDUCATION

2000-2015: the experience

- 2010 GMR estimated **annual gap** for universal primary and lower secondary education in 2008-2015 at **US\$25 billion**

2015: the challenge and the opportunity

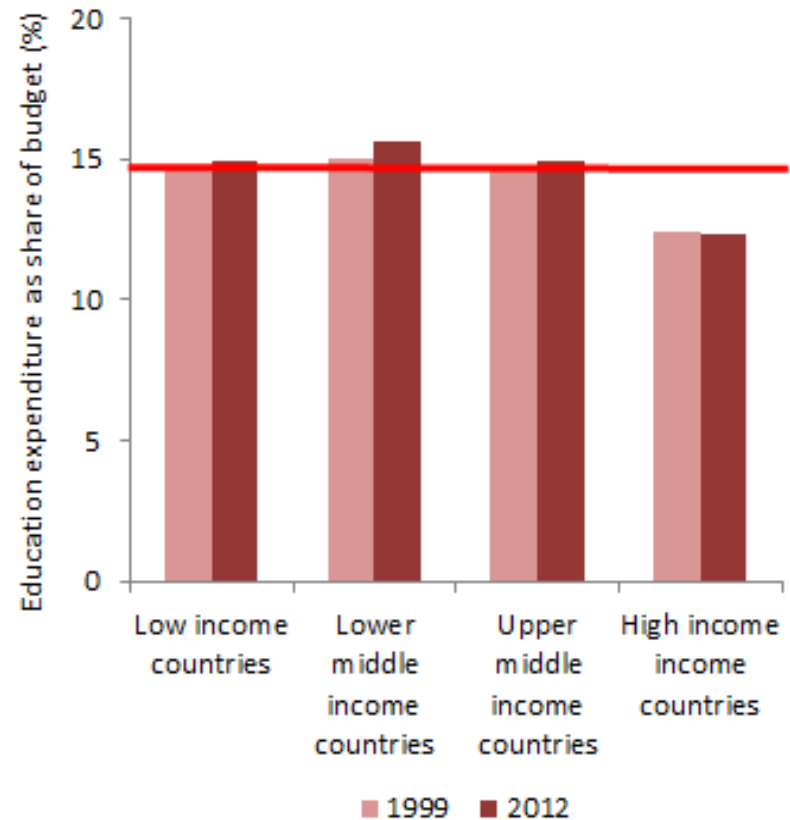
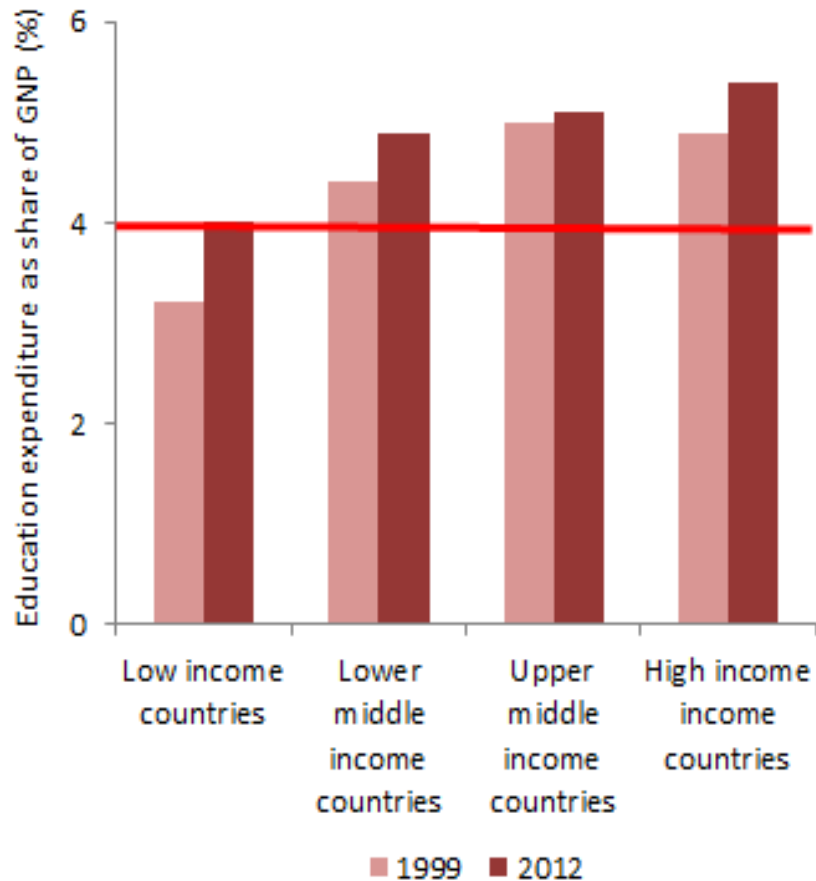
- major international conferences agreed post-2015 targets and their implementation mechanisms
- projections suggest world will remain far from targets unless major action is taken, e.g. lower secondary completion rates of 50% in low and 80% in lower middle income countries by 2030
- **lack of finance one of the main constraints** explaining why core EFA targets were not achieved



Domestic financing: many countries increased spending

On average, countries **increased** their **spending** on education...

...but mainly because of more **revenue**, and **not** because of **prioritizing** education





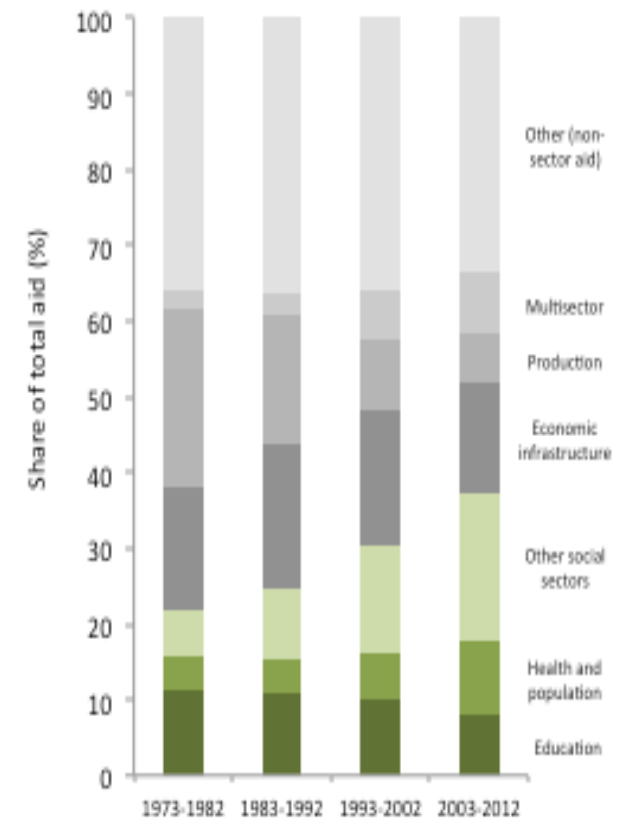
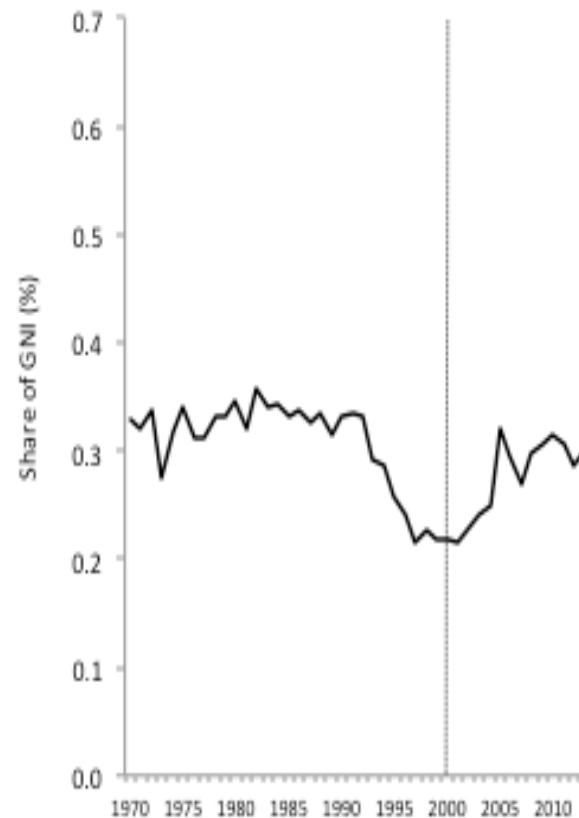
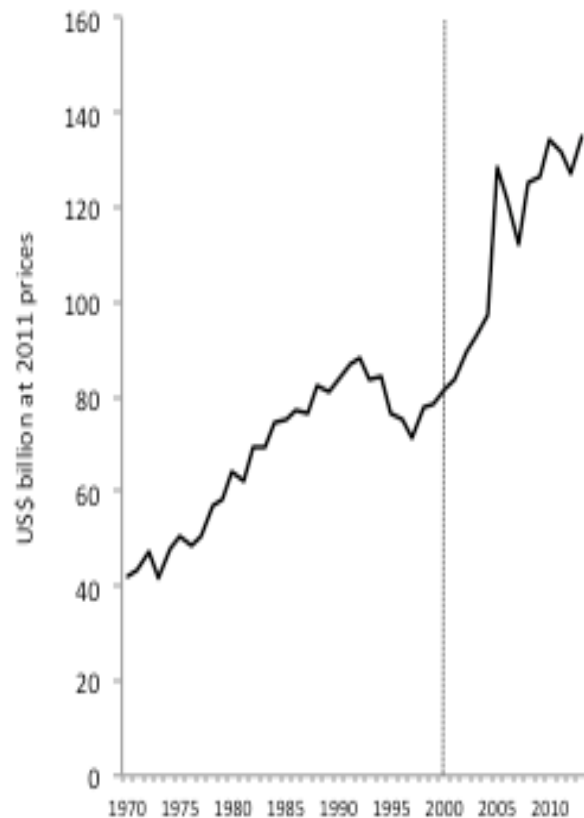
International aid: donors did not keep their promise

Looking at the big picture **after 2000**:

Total aid (to all sectors) **increased** in **volume...**

...but **not** in **relative** terms...

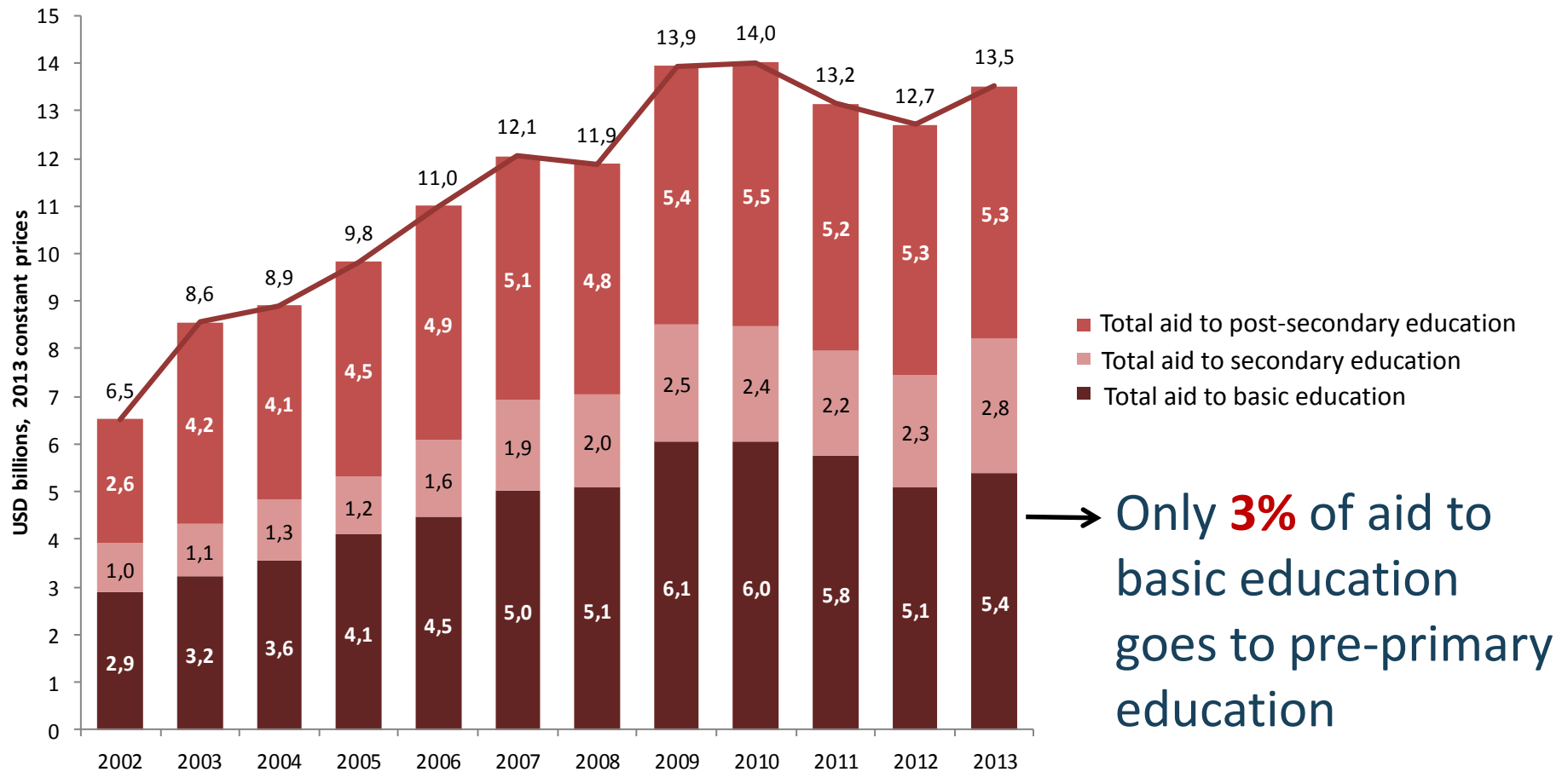
...and the **share** of education continued to **decrease**





International aid: donors did not keep their promise

Aid to education **doubled** from 2002 to 2009
but **levelled off and fell** between 2010 and 2013



What SDG4 targets were costed?

Early childhood (4.2)

- all children complete one year of pre-primary education

Primary and secondary education (4.1)

- all complete *primary* and *lower* secondary education and gain *access* to *upper* secondary education, including classroom construction and maintenance costs

Quality (cross-cutting)

- declining PTR as countries become richer with average ratios at 15:1 (pre-primary), 29 (primary), 27 (secondary) by 2030
- teacher salaries converge to 50% of better paying countries
- 25% of recurrent expenditures for non-salary expenditure

Equity (4.5 and cross-cutting)

- per student costs increase by 20%-40% to address the disadvantages of out of school children living in poverty

What targets were not costed

This exercise indirectly **takes into account** two more targets:

- universal youth literacy (= higher quality primary education) (4.6 partial)
- education for sustainable development / global citizenship (assuming that funds for these priorities come from non-salary recurrent expenditure) (4.7)

This exercise **does not take into account** targets related to:

- tertiary education (4.3)
- skills for work (4.4)
- adult literacy (4.6 partial)
- scholarships (4.b)

Some differences compared to the 2010 EFA GMR costing

- Wider **coverage**: from 46 countries to **82 countries** (=all LICs/LMICs)
- Longer **reference period**: from 8 years in 2010 (i.e. 2008-2015) to **16 years** in 2015 (i.e. 2015-2030)

Key assumptions

- the targets whose costs were estimated will be reached by 2030
- GDP growth rates follow IMF projections up to 2016; after that converge to a long-term average growth rate of 5%
- Increase in (i) tax ratios as share of GDP and (ii) share of government budget allocated to education by 2030

Results: total annual cost

The annual total cost of universal pre-primary, primary and secondary education is projected to:

- more than double in LICs and LMICs from US\$149 billion in 2012 to an annual average of **US\$340 billion** between 2015 and 2030*
- increase from 3.5% to **6.3%** of GDP in LICs/LMICs between 2012 and 2030
- consist of recurrent expenditure (84%), capital expenditure (11%) and catering for marginalized (5%)
(but 8% in LICs and above 12% in some of the poorest countries)

Higher enrolment (18%) and higher expenditure per student (82%) account for the increase in total cost. For example:

- the number of children in pre-school will increase **six**-fold in LICs
- the cost per primary education student in LICs will need to increase from US\$65 to **US\$199**.

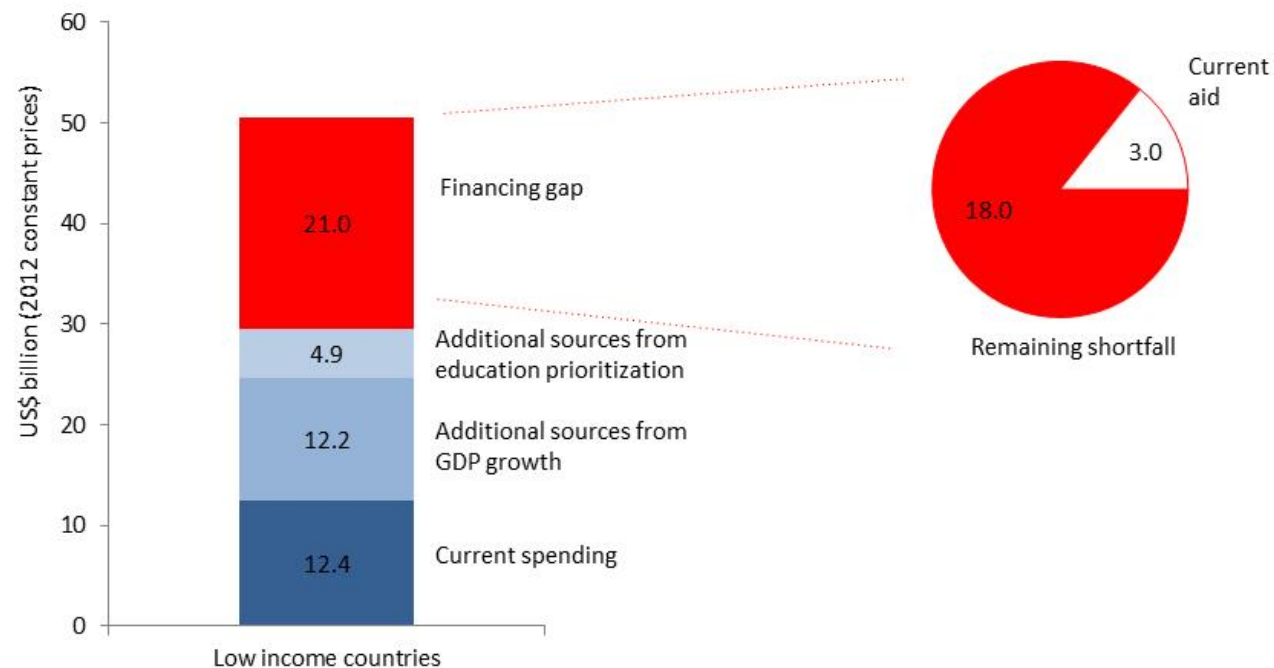
* GPE has transformed this figure into an estimate of **\$1.08** -- the amount needed each year to educate a child from pre-primary **all the way** to upper secondary in **all** low and lower middle income countries from 2015 to 2030.

The exercise assumes significant increase in domestic effort:

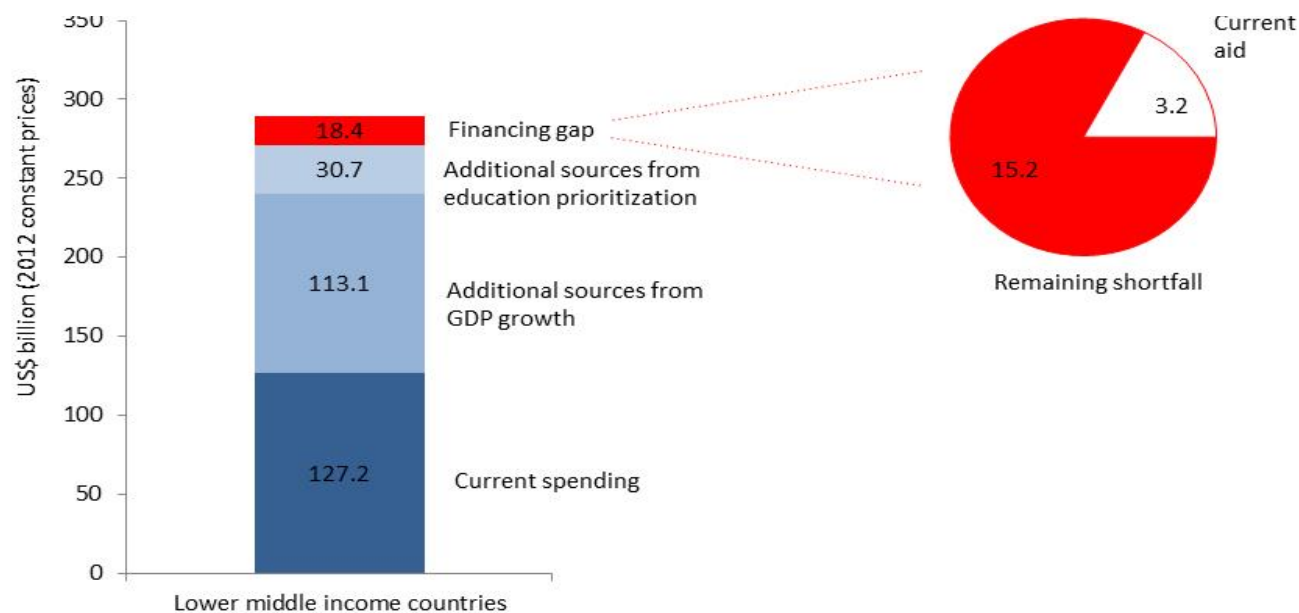
- Combined effect of increasing tax revenue as a share of GDP and share of the budget allocated to education (above 20%) will be to increase public expenditure on pre-primary, primary and secondary education:
 - from 2.6% to **3.9%** of GDP in LICs excluding aid
(for reference these countries increased the relevant share of GDP by 0.8 percentage points between 1999 and 2012)
 - from 3.3% to **3.9%** of GDP in LMICs excluding aid

Results: financing gap

Low income countries



Lower middle income countries



Many countries are unlikely to increase their public education expenditure to cover the total cost of meeting the targets:

- the **average annual financing gap** remaining across all LICs and LMICs between 2015 and 2030 is estimated at **US\$39** billion
- in **Low income countries**, the annual gap of US\$21 billion is **42%** of the total cost
- in **Lower middle income countries**, the annual gap of US\$18 billion is **6%** of the total cost
- across LICs and LMICs, **aid** to pre-primary, primary and lower secondary education (currently at 6.2 billion) would need to increase by at least **6** times to address to fill the financing gap ... unless other external sources of financing step in

Costing model available on line

<http://en.unesco.org/gem-report/node/819>



Policy Paper 18

March 2015

This paper shows there is an annual financing gap of US\$39 billion over 2015-2030 for reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries.

Pricing the right to education: The cost of reaching new targets by 2030

Summary The right to education is a fundamental principle of the United Nations Sustainable Development Goals. This paper estimates the cost of reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries by 2030. The paper shows there is an annual financing gap of US\$39 billion over 2015-2030 for reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries. The paper also shows that the cost of reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries by 2030 is US\$1.1 trillion. The paper also shows that the cost of reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries by 2030 is US\$1.1 trillion. The paper also shows that the cost of reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries by 2030 is US\$1.1 trillion.

The post-2015 education agenda is a major opportunity for new financial commitments

Low- and middle-income countries are facing the most significant challenge in achieving the Sustainable Development Goals. The post-2015 education agenda offers the best opportunity for new financial commitments to reach the Sustainable Development Goals. The paper shows that the cost of reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries by 2030 is US\$1.1 trillion. The paper also shows that the cost of reaching universal pre-primary, primary and lower secondary education of good quality in low and lower middle income countries by 2030 is US\$1.1 trillion.

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Published: Sunday, 1 March, 2015

Updated: July 2015

This paper shows there is an annual financing gap of US\$39 billion over 2015-2030 for reaching universal pre-primary, primary and secondary education of good quality in low and lower middle income countries. It is accompanied by four resources: a detailed [background paper](#); the [costing model](#) where users can compare the results of changing selected underlying assumptions and using different data sources; a short [user guide](#) to the model; and a [presentation](#).

[➤ View paper](#)

[➤ French version](#)

[➤ Spanish version](#)

Better quality data and financing policies are needed

These estimates for LICs and LMICs are based on the most recent data available and give good indication of the real financing gap.

Even so:

- the quality and coverage of official financing **data** remain poor
 - national level analysis must complement global estimates
- strong national **policies** are needed **to accompany more finance**; same spending levels produce different results across countries as result of differences in:
 - **equity**: more than just a higher cost per (marginalized) student
 - **efficiency**: political economy issues on how money is spent
 - **effectiveness**: e.g. effects of investment in health on education

Part III

Challenges for national planners

Do planners have the needed data?

Do planners have sufficient **data** on how much is spent and by which sources to make informed decisions?

- transparency and **timeliness** of data on approved, revised and actual spending
- low quality of Education Management Information Systems **financial information at the school level** (not collected in many countries)
- lack of information or records on **local government expenditure** in all sectors, especially in education; and
- insufficient use of **complementary data** sources, such as:
 - development aid databases or NGOs allocations
 - household expenditure surveys

➔ valuable IIEP work on **national education accounts** (sources, uses and levels)



Are financing policies fair and equitable?

Are financial resources directed at the population groups or geographical locations which need them most?

- Are there policies to provide more resources to **students / schools** from disadvantaged households? If so:
 - what share of total public education spending is reallocated (**depth**)
 - what percentage of the student population does it reach (**coverage**)
- How are **targeting** decisions made...
...and is the success of targeting monitored and evaluated?
- Is **information** on such policies and programs clear, publicly available and well-known to disadvantaged **students / schools**?

Are financing policies efficient?

Can the same outcomes (eg. participation, completion, learning) **be achieved with fewer resources?**

- Strong **public financial management** cycle, including proper accounting, reporting and auditing
- Accountable and transparent **governance** and scrutiny of public spending to fight corruption and open the budget process
- Different expenditure mix
 - between levels: basic, ECCE, post-compulsory, non-formal
 - between inputs

Are financing policies effective?

Do planners monitor whether policies have the desirable effect?

- Are data used to identify whether current financial allocations are having intended **effects** on results?
- Do planners look not only at education policies but also at **other** government policies which may be complementary and having a positive effect on education?
(e.g. health and social protection policies)

Of course, much rests outside education...

Needless to say: higher resource envelope for education requires

- Strong **domestic resource mobilization** capacity, ranging from internal revenue services to management of natural resources
- Better **management of external assistance**
- Support of the international community to prevent **tax avoidance** and **tax evasion**
- A lot of discussion on **private** (and innovative) financing...
...but, if anything, private financing of education is already too high in poorer countries

Conclusion

To sum up

- Global costing gives a sense of the (massive) overall challenge
- But challenges differ from context to context and the overall challenge needs to be applied to national realities:
e.g., the projected need is too high for some countries
- Planners will need to improve their data sources and data uses
- Focus on policies for
 - equity: not all students / schools should receive the same
 - efficiency: do away with incremental budgets
 - effectiveness: be concerned that your policies work
- Be part of the overall national debate for improved public finance

en.unesco.org/gem-report/

Register for the World Education Blog:

[**efareport.wordpress.com**](http://efareport.wordpress.com)

And a new Spanish language blog on global education policy:

[**educacionmundialblog.wordpress.com**](http://educacionmundialblog.wordpress.com)

#EduVerdict / @efareport

