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THE WORLD BANK

From Schooling Access to Learning Outcomes: An Unfinished Agenda

An Evaluation of World Bank Support to Primary Education

THE WORLD BANK GROUP

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Foreword

The Education for All (EFA) movement, launched in 1990, has resulted in an extraordinary mobilization of World Bank and country resources in support of basic education over the past 15 years. World Bank EFA financing, mostly focused on primary education, has become increasingly progressive, targeting the most disadvantaged countries and often the disadvantaged within countries.

In most parts of the world, Bank and country investments have led to significantly improved access to primary education through the construction of new schools and the reduction of other physical, financial, and social barriers.

Nevertheless, tens of millions of children in the developing world—mostly girls, the poor, and other disadvantaged—remain out of school, hundreds of millions drop out before completing primary school, and of those who do complete, a large proportion fail to acquire desired levels of knowledge and skills, especially in the poorest countries of South Asia and Sub-Saharan Africa. Beyond achieving universal completion of primary education, a Millennium Development Goal (MDG), the remaining EFA challenge is to ensure that all children, particularly the disadvantaged, acquire the basic knowledge and skills that are crucial for poverty reduction.

Over the years of Bank support for EFA and its world conferences in 1990 and 2000, the Bank's policy objectives for increased support to primary education have been simple and remarkably stable: *universal primary school completion, equality of access for girls and other disadvantaged groups, and improved student learning outcomes.* This Independent Evaluation Group (IEG) evaluation was mounted to assess the extent to which these objectives have been met in countries supported by the Bank. The main objectives of the evaluation were to assess World Bank assistance to countries in their efforts to improve their basic knowledge and skills base through the provision of quality primary education, and to provide lessons for countries in their development strategies and for the Bank in its support to those strategies.

Evaluation findings show clearly that World Bank financial support for primary education has increased since 1990. Nearly 90 percent of the Bank's $14 million primary education portfolio has been committed since that date. The share of primary education lending allocated to the poorest countries has more than doubled over this same period, from 26 to 54 percent. Commit-

ments rose in all geographic regions, but most notably in Latin America and the Caribbean, South Asia, and Sub-Saharan Africa.

Expanding enrollments was one of two subgoals in reaching universal completion, and in this the evaluation showed widespread success in Bank-supported primary education projects. About 69 percent of projects in the study sample reached their enrollment expansion goals. In the 12 countries where IEG made field visits to Bank-funded projects, gross enrollment ratios have increased an average of 19 percentage points over the past 10–12 years. In countries such as Mali and Uganda, increases were explosive. Projects from outside the Education Sector often contributed heavily to this goal, through their emphasis on building schools and community support; national policy contributions included reducing or dropping school fees.

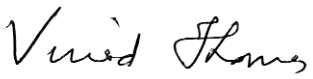
The other subgoal in universal completion was improving internal efficiency (reducing dropout and repetition). This goal was underemphasized in Bank-supported projects, even in countries with very poor efficiency records (for example, Niger). Where it was an explicit objective, only about a quarter of Bank-supported projects were successful. Equity of access for girls was often pursued by projects in countries having gender disparities and generally reached their access targets even though boy-girl gaps were often not closed. Equity for the poor was somewhat less often pursued, but still taken up with a high level of success. The focus of equity efforts was on access, not on learning outcomes.

Although it is a key Education Sector concern, improvement in learning outcomes was not as often an objective in primary education projects: about one in three included them in explicit objectives or in performance indicators. Of the 12 field-visit countries, only 5 even had formal systems for tracking student learning. Of the Bank-supported projects that included improving learning outcomes, most of them did so successfully. However, even where learning improved, absolute levels of student achievement were very low, particularly among the disadvantaged: in Ghana only 5 percent of children are reaching the country's mastery level in English, and in India half of 7-year olds are unable to read a short paragraph fluently. Poor delivery of educational services was at the root of low student performance, and much of that can be traced back to weak subsector management, including weak incentives for improving learning outcomes.

This evaluation presents the following main recommendations:

- Primary education efforts need to focus on improving learning outcomes, particularly among the poor and other disadvantaged children. The MDG push for universal primary enrollment and completion, although a valuable intermediate goal, will not suffice to ensure that children achieve the basic literacy and numeracy that are essential to poverty reduction. To reduce poverty, countries in partnership with the Bank need to make improved learning outcomes a core objective in their primary education plans and focus on the factors—shown by country-level analysis—most likely to influence such outcomes in the local context, recognizing that *improving learning outcomes for all* will require higher unit costs than universal completion.
- Efforts are urgently needed to improve the performance of sector management in support of learning outcomes. This implies the need for sound political and institutional analyses, taking into account the incentives faced by officials and teachers to improve the quality of teaching and learning; for strengthened accountability and supervision systems that cover learning outcomes in disadvantaged communities' schools; and for improved monitoring and evaluation systems that track learning outcomes over time among different income and social groups, cover staff and system performance (not just inputs and outputs), and include incentives to ensure that findings are used in decision making. The Bank should require all new Country Assistance Strategies to include learning outcomes indicators.
- Finally, the Bank needs to work with its development partners to reorient the Fast-Track Initiative (FTI) toward supporting improved

learning outcomes, in parallel with the MDG emphasis on primary school completion. This will require some reframing of FTI goals and objectives; the addition of relevant items in the "indicative framework"; assistance to countries in setting up suitable learning assessment systems; and revisions of cost and financing gap estimates to include the higher unit costs of reaching the most disadvantaged and supporting improved learning outcomes for all.



Vinod Thomas
Director-General
Evaluation

Executive Summary

Basic knowledge and skills—not educational attainment—are key to reducing poverty. Raising enrollments and completing primary schooling are necessary—but not sufficient—to ensure basic literacy and numeracy.

Developing countries and partner agencies such as the World Bank need to focus on raising learning outcomes, particularly among disadvantaged children, to realize the poverty reduction benefits of investing in primary education.

The Education for All (EFA) movement, launched in 1990, has resulted in an extraordinary mobilization of World Bank and country resources in support of basic education over the past 15 years. World Bank EFA financing, mostly focused on primary education, has become increasingly progressive—targeting the most disadvantaged countries, and often the disadvantaged within countries. In most parts of the world, Bank and country investments have led to significantly improved access to primary education through the construction of new schools and the reduction of other physical, financial, and social barriers.

Nevertheless, tens of millions of children in the developing world—primarily girls, the poor, and other disadvantaged groups—remain out of school; hundreds of millions drop out before completing primary school; and of those who do complete it, a large proportion fail to acquire desired levels of knowledge and skills, especially in the poorest countries of South Asia and Sub-Saharan Africa. Beyond achieving universal completion of primary education, which is one of the Millennium Development Goals (MDGs), the remaining EFA challenge is to ensure that all children, particularly the disadvantaged, acquire the basic knowledge and skills that are crucial for poverty reduction.

During the 1990s and into the current decade, World Bank policy on primary education was conveyed in a series of policy and strategy papers and updates. These were also the basis of its support of EFA conferences in 1990 and 2000. Over these years, the Bank's policy objectives for primary education have been simple and stable: universal primary school completion, equality of access for girls and other disadvantaged groups, and improved student learning outcomes.

The World Bank has promoted a variety of strategies for achieving these objectives. Strategies have ranged from improving internal efficiency and building institutional capacity in the 1980s, to aggressively supporting girls' education, improving teacher education, and creating achievement assessment systems in the

early 1990s, to increasing community involvement, school autonomy, decentralization, and early childhood education in the late 1990s.

The Bank also endorsed the MDG calling for universal completion of primary education by 2015 and subsequently cosponsored the Fast-Track Initiative as a means of accelerating progress toward that goal. The Bank's 2005 *Education Sector Strategy Update* commits the Bank to maintaining momentum on EFA and the MDGs, while at the same time strengthening "education for the knowledge economy" (secondary, higher, and lifelong education). Its strategy emphasizes increased focus on results, systemwide approaches, and closer collaboration with other donors.

This evaluation has two objectives. The first is to assess World Bank assistance to countries in their efforts to improve their basic knowledge and skills base through the provision of quality primary education, particularly since the beginning of the EFA movement in 1990.

The second objective is to provide lessons for countries in their development strategies, and for the Bank in its support of those strategies. Early findings of the evaluation have been incorporated in the 2005 *Education Sector Strategy Update.* This evaluation is intended to help the Bank work more effectively with partner countries in converting these strategies into results-oriented programs.

A review of the Bank's lending portfolio for primary education examined documents from more than 700 projects that allocate funds to primary education; about 440 of these projects originated in the Education Sector. They were reviewed to assess the volume, substance, and geographic reach of Bank lending for primary education.

A smaller group of 198 projects allocated at least half of their funding to primary education. From this pool a random sample of 35 completed and ongoing projects was drawn to examine in-depth policy implementation, effectiveness, sustainability, and institutional development. In addition, a purposive sample of 15 projects with the highest allocations to primary education from other sectors was examined.

Together, these 50 projects comprise the evaluation's "portfolio sample." The evaluation also drew on recent, in-depth Independent Evaluation Group (IEG) field assessments of primary education projects in seven countries; an impact evaluation of Bank support for primary education in Ghana; and country case studies in Mali, Pakistan, Peru, and Romania.

Bank Support to Primary Education Has Grown Rapidly

From 1963, the first year of Bank lending to education, to 2005, the total amount of Bank lending to primary education was an estimated $14 billion. Nearly 90 percent of Bank lending for primary education has occurred since the beginning of the EFA movement in 1990.

About two-thirds of this lending has been in the form of International Development Association credits. The share of primary lending to countries accounting for the poorest 40 percent of the global population has more than doubled over the past 15 years, from 26 to 54 percent. Commitments rose in all geographic Regions, but most notably in Latin America and the Caribbean, South Asia, and Sub-Saharan Africa.

Absolute increases in Bank financing for primary education were accompanied by substantial decreases in support for vocational education; funding for tertiary and secondary education remained steady. The amount of Bank analytic work on primary education from 2000 to 2005 has remained stable at about 17 products per year. Relatively few of these products have focused primarily on learning outcomes.

A growing share of lending for primary education has been through projects managed outside the Education Sector and through development policy (adjustment) lending. For the most recent five-year period, 31 percent of all commitments to primary education were through components of projects managed by other sectors. Increases in Bank support for primary education have often been matched by increases in the country partner's financial commitment to primary education, sometimes influenced by development policy agreements between the Bank and the country.

Meeting Policy Objectives

The main policy objectives of the sector since 1990 have been to expand primary school enrollments and completion, improve equity of access, and bolster learning outcomes. About two-thirds of primary school investment projects included an expansion objective. About the same proportion covered equity of access (mostly for girls and the poor).

Regrettably, relatively few projects (less than 60 percent) had objectives to reduce school dropout and repetition rates (improving internal efficiency). This is key for raising primary completion rates.

Only about one in five projects had an explicit objective to improve student learning outcomes. This does not mean that projects were unconcerned about quality: almost all aimed for improvements in educational quality, but until recently this was mostly seen in terms of delivery of inputs and services. Most projects also aimed to strengthen education sector management or governance.

The objectives of development policy lending for primary education were similar to those for investment projects, except that all of these projects aimed to expand enrollment, and even fewer focused on learning outcomes. Investment projects that were managed by other sectors but had considerable support for primary education generally focused on increased enrollments and equity.

Expanding Access

Access expansion was the most successfully met objective in Bank-supported primary education projects: 69 percent reached their expansion goals. In the 12 IEG field study countries where the Bank supported enrollment gains, gross enrollment ratios increased an average of 19 percentage points over the past 10–12 years. In countries such as Mali and Uganda, enrollment more than doubled.

Enrollment expansion has generally come through supply-side interventions: creating new schools within easy walking distance of home, hiring more teachers, or activating community support. An increasing amount of Bank support for supply-side expansion programs is coming through projects that do not originate in the Education Sector. Also, in recent years, demand-side policies have been successfully implemented by governments, often with the support of the Bank, such as eliminating school fees (as in Uganda and Malawi) and providing scholarships (Pakistan) or conditional cash transfers (Mexico).

National equity objectives were also generally reached, at least in terms of increasing the enrollment of girls and children from poor families (the Reublic of Yemen, Mali). But equity gaps between poor children and more advantaged children did not always close. Improving completion rates through reducing dropout and repetition (improving internal efficiency) was often underemphasized, even in countries with very poor efficiency records (Niger). Where it was an explicit objective, countries succeeded in only about a quarter of Bank-supported projects.

Key lessons:

- A trade-off between improved access and student learning gains can be avoided with explicit planning for improved learning outcomes and strong political commitment to that goal.
- If primary school completion rates are raised by automatically promoting children to the next grade or without heeding student learning outcomes, then higher completion rates will not reflect improvements in knowledge and skills—which is the ultimate policy objective—especially among the disadvantaged.
- Many of the strategies used to rapidly increase access, such as "big bang" fee reductions, use of contract teachers, double-shifting, and automatic promotion, have had negative effects on learning outcomes, at least in the short run, and some of these strategies are difficult to sustain.

Improved Learning Outcomes

Little of the Bank's recent analytical work covering primary education has focused mainly on learning outcomes and their determinants. This suggests that an adequate evidence base to inform efforts to raise learning outcomes is often lacking. Many countries still do not

generate the information they need to design solutions to improve low learning outcomes among the disadvantaged, and there has not been adequate experimentation with local solutions and their evaluation with respect to their impact on learning outcomes.

Few of the sample investment projects in the portfolio aimed to improve learning outcomes (less than one in three). Among those that did, however, the majority were successful. Sample projects showing the most improvement in learning outcomes were in Latin America (Chile, Mexico, and Uruguay) and India, and all are cases where national commitment to learning outcomes and their measurement is high.

Among 12 countries where the evaluation undertook field studies, only 5 had repeated measures of learning outcomes. In three of these—Ghana, India, and Uruguay—learning improved over time, at least in part due to project interventions. There were even fewer countries where improving learning outcomes among the disadvantaged was an objective, but where this was a goal (such as in Uruguay and India), results were positive, and gaps between the more and less advantaged narrowed.

Even in countries where learning outcomes have improved, absolute levels of student achievement are still low. For example, in Ghana only 10 percent of children reached the country's mastery levels in math and 5 percent in English. In India, half of 7- to 10-year-olds were unable to read fluently a short paragraph of grade 1 difficulty.

Social fund and other community-driven projects, which have typically emphasized school construction, are often loosely linked to sector policies. They have frequently overlooked the need for complementary investments in school quality and do not always have adequate technical input from education experts.

Key lessons:

- More, better, and more contextualized analytical work is needed on learning outcomes and their determinants at the primary level.
- Countries need to resist the temptation to increase access first and improve learning outcomes later; expansion and quality improvement can be successfully undertaken together and can have mutually reinforcing effects. Moreover, competing pressures may make it difficult to undertake quality retrofitting at a later date.
- Failure to provide reading skills in the early primary school years—among both the advantaged and disadvantaged—is often at the root of weak learning outcomes.
- Although the Fast-Track Initiative has been a strong force in encouraging rapid increases in enrollment and completion, as the main channel of coordinated donor support to primary education it could have a much sharper focus on improving learning outcomes.

Better Management for Better Outcomes

Improved sector management has been a goal of virtually all Bank-supported primary education projects, but performance has been below expectations. Only one project in four achieved this objective. Only 25 percent of primary education projects received an IEG rating of substantial or better on institutional development impact. Particularly weak were activities aimed at improving central management, such as planning, policy making, and budgeting.

The Bank supported decentralization efforts in most study countries, often with good results (Honduras and India), but in some cases there was ambiguity in what the different levels covered, nonalignment of administrative and financial features of decentralization, and undertraining of local government staff for their new tasks. The extent to which some forms of decentralization might be contributing to increased school system inequities has not been adequately assessed.

School-level management activities were relatively more effective, and so were efforts to empower communities in school improvement efforts. This was particularly true for physical improvements but not for improved teaching or learning. Various approaches to more equitable teacher distribution have been tried with mixed results, the most promising being the recruitment of local (often untrained) youth, as long as

provisions can be made for their professional development, career paths, and job security.

Project monitoring and evaluation has typically tracked outputs, rather than outcomes or impacts, but this appears to be changing. Bank support has helped governments establish management information, student assessment systems, and research capacity, but their quality and the degree to which they have been used for improving policy and practice have been limited.

Key lessons:

- Sector management and governance might have been better dealt with had there been better institutional and political assessments at the outset.
- Weak management incentives at all levels can be a constraint, especially to the improvement of education quality. There are often more rewards for increasing the number of schools than for the difficult tasks of redistributing teachers, implementing a new curriculum, or doing effective monitoring and evaluation.
- Few Bank-supported country programs directly addressed teacher recruitment and performance incentives; particularly lacking are performance incentives related to student learning outcomes.

Recommendations

- **Primary education efforts need to focus on improving learning outcomes, particularly among the poor and other disadvantaged children.** The MDG push for universal primary completion, while a valuable intermediate goal, will not ensure that children achieve the basic literacy and numeracy that are essential to poverty reduction. This means that:
  - Improving learning outcomes needs to be a core objective of all support for primary education, with a particular focus on achieving equity in learning outcomes by gender and among the poor or otherwise disadvantaged.
  - The Bank's primary education assistance—whether sponsored by the Education Sector or other sectors—needs to focus on the factors most likely to affect learning outcomes in a given country's context. This will require more analysis of student learning and its local constraints and facilitators.
  - The Bank and governments need to recognize that reaching children not yet enrolled and improving low achievement levels will raise the unit costs of primary education.

- **Efforts are urgently needed to improve the performance of sector management in support of learning outcomes.** This implies that:
  - Programs to improve sector management and governance need to be based on sound political and institutional analyses that take into account the incentives faced by officials and teachers to improve the quality of instruction and learning outcomes. Accountability and supervision systems need to be adapted to support improved learning outcomes.
  - Primary education managers need to: (a) track learning outcomes over time—not just the average, but among different income and social groups; (b) monitor individual staff and system performance indicators, for both centralized and decentralized activities; and (c) create and use incentives to encourage staff to improve and use technical skills. All new Country Assistance Strategies should include learning outcome indicators.
  - Analytic, assessment, and research activities need to be oriented to informing key management and policy issues, with incentives to ensure that the findings are used in decision making. One such research priority would be to assess the impact of decentralized management on inequalities across income and social groups and to identify mitigation measures of any adverse effects.

- **The Bank needs to work with its development partners to reorient the Fast-Track Initiative to support improved learning outcomes, in parallel with the MDG emphasis on primary completion.** This will require the following:
  - Reframe the goals and objectives of the Fast-Track Initiative to include improved

learning outcomes for all, in addition to school completion for all.

- Require learning achievement indicators and targets in country Fast-Track Initiative proposals and add items to the indicative framework that are directly related to learning outcomes, such as instructional time, teacher attendance, or availability of textbooks.
- Assist countries, financially and technically, to set up suitable systems to conduct repeated learning assessments capable of tracking outcomes separately for disadvantaged groups, including the poor.
- Revise cost and funding gap estimates to (a) reflect the costs of achieving basic learning outcomes (not simply primary completion) and (b) take into account the increased unit costs of expanding access to and improving learning outcomes among children from disadvantaged backgrounds.

ACRONYMS AND ABBREVIATIONS

APL	Adaptable Program Loan
CAS	Country Assistance Strategy
CCT	Conditional cash transfer
CSR	Country Status Report
DPEP	District Primary Education Project (India)
DPL	Development policy lending
EdSIP	Education Sector Investment Program
EDUCO	Community-Managed School Program (El Salvador)
EFA	Education for All
EMIS	Education management information system
ESAC	Education Sector Adjustment Credit (Uganda)
ESW	Economic and sector work
EU	European Union
FTI	Fast-Track Initiative
GDP	Gross domestic product
GER	Gross enrollment rate
HIPC	Heavily indebted poor countries
IBRD	International Bank for Reconstruction and Development (World Bank)
ICR	Implementation Completion Report
IDA	International Development Association
IEG	Independent Evaluation Group (formerly OED)
LLECE	Latin American Laboratory for Assessment of Quality of Education
M&E	Monitoring and evaluation
MDG	Millennium Development Goal
MECEP	Primary Education Quality Project (Peru)
MER	Ministry of Education and Research (Romania)
NER	Net enrollment ratio
NGO	Nongovernmental organization
OECD	Organisation for Economic Co-operation and Development
OED	Operations Evaluation Department (now IEG)
PCR	Primary completion rate
PEP	Primary Education Project (Vietnam)
PETDP	Primary Education and Teacher Development Project (Uganda)
PISA	Programme for International Student Assessment
PPAR	Project Performance Assessment Report
PROHECO	Community Education Program (Honduras)
PRSC	Poverty Reduction Support Credit
PRSP	Poverty Reduction Strategy Paper
PSRL	Programmatic Social Reform Loan
QAE	Quality at entry

QAG	Quality Assurance Group
SAP	Social Action Program
SAPP	Social Action Program Project
SAR	Staff Appraisal Report
SWAp	Sectorwide approach
TIMSS	Third International Mathematics and Science Study
UNESCO	United Nations Educational, Scientific, and Cultural Organization
UPE	Universal primary education
USAID	United States Agency for International Development

OED changed its official name to the Independent Evaluation Group (IEG) in December 2005. The new designation "IEG" will be inserted in all IEG's publicatons, review forms, databases, and Web sites.

Chapter 1: Evaluation Highlights

- The World Bank has committed approximately $14 billion for primary education since 1963.
- Primary education contributes to poverty reduction primarily by improving basic knowledge and skills.
- Basic knowledge and skill levels, even among school graduates, have often been very low in developing countries.
- Bank policy objectives for primary education have emphasized universal access and improved learning outcomes.
- The education Millennium Development Goals and the Fast-Track Initiative emphasize primary school completion, not learning outcomes.

Introduction

Primary education is a powerful lever for poverty alleviation and social and economic growth (World Bank 2002b). Its results can be empowering, enabling graduates to take charge of their lives and make more informed choices, contribute to the building of a democratic polity, increase earning potential and social mobility, improve personal and family health and nutrition (particularly for females), and enable women to control their fertility.[1]

Advancing Primary Education: A Worldwide Goal

World Bank studies in the early 1980s showed relatively high rates of return to investments in primary education (Psacharopoulos and Woodhall 1985). More recent research shows that it is the knowledge and skills acquired during primary education rather than the number of years of schooling completed that make a difference in personal economic mobility (Glewwe 2002) and national economic growth (Coulombe, Tremblay, and Marchand 2004; Hanushek and Kimko 2000).[2] Thus, to the extent that public investments in primary education are effective in conveying these learning outcomes, support for primary education is central to the World Bank's mandate of poverty reduction.

Developing countries, the World Bank, and the international community have invested heavily in primary education over the past few decades. Since 1963, when it began lending for education, through mid-2005, the World Bank alone has committed about $14 billion for support to primary education in more than 100 low- and middle-income countries (box 1.1).[3] Primary enrollments grew rapidly in the 1960s and 1970s, but stagnation and setbacks in the 1980s were brought on by economic downturns, especially in Sub-Saharan Africa (figure 1.1).

An estimated 103 million 6- to-11-year-olds in developing countries—or about one-fifth of the total—were still not in school in 2001 (UNESCO 2004). United Nations global monitors now predict that, at current trends, nearly 47 million children will still be out of school in 2015 (UNDP 2005).

About a fifth of developing country children still lack access to primary education.

About 80 percent of out-of-school children were in low-income countries in South Asia and Sub-Saharan Africa, and 15 percent were in the Middle East and North Africa (World Bank 2002b). Within countries, access to primary

Box 1.1: How Much Has the World Bank Committed to Primary Education?

If all primary education projects were devoted completely to primary education, then calculating the World Bank's commitments would be straightforward. However, primary education is often part of a larger investment or sector adjustment activity that includes other education subsectors and improvements in management and administration. This makes it difficult to attribute them to any one level of schooling. Further, primary education can also be found as part of projects in other sectors, such as agriculture, community development, or HIV/AIDS, or incorporated in development policy lending (DPL) with objectives related to primary education, even though the budgetary support is not earmarked for specific sectors.

The evaluation used two internal databases to estimate primary education expenditure—one maintained by the Bank's Education Sector exclusively for projects originating in that sector, and a Bank-wide database that covers projects in all sectors, including education. Both databases attribute percentages of project spending to specific subsector codes, including primary education.[a]

In recent years a "general education" code, which can include all types of education expenditures, has come into widespread use. The convention followed by Education Sector management, based on analysis of a subsample of projects with the "general education" code, is to allocate half of general education expenditures to primary education. Many social fund and community-based or -driven projects also allocate funds for "other social services," and it is left to the communities to decide what will be financed.

It was not possible to calculate what share of these types of funds was ultimately used by communities to finance primary education inputs, but given the proliferation of this type of project (IEG 2005c) and the fact that basic education is often among communities' top priorities, primary education financing from this source could be substantial.

The Independent Evaluation Group (IEG) estimate of $14 billion in Bank commitments to primary education since 1963 is based on data for projects originating in the Education Sector, on data for projects originating in other sectors, and the Education Sector's convention of allocating half of general education commitments to primary education.

For DPL, including Poverty Reduction Support Credits (PRSC), the database with all projects attributes a notional share of the total commitment for budgetary support to as many as five sectors, based on an assessment by the task team leader of the frequency of the sector's occurence in the policy matrix.

education is unevenly distributed by gender, income, ethnicity, and disability and between rural and urban areas.

Two-thirds of out-of-school children were girls, a share almost unchanged from a decade before (Watkins 2001). Moreover, children from the richest 20 percent of households in developing countries are three times more likely to be in school than those from the poorest 20 percent (UNDP 2005).

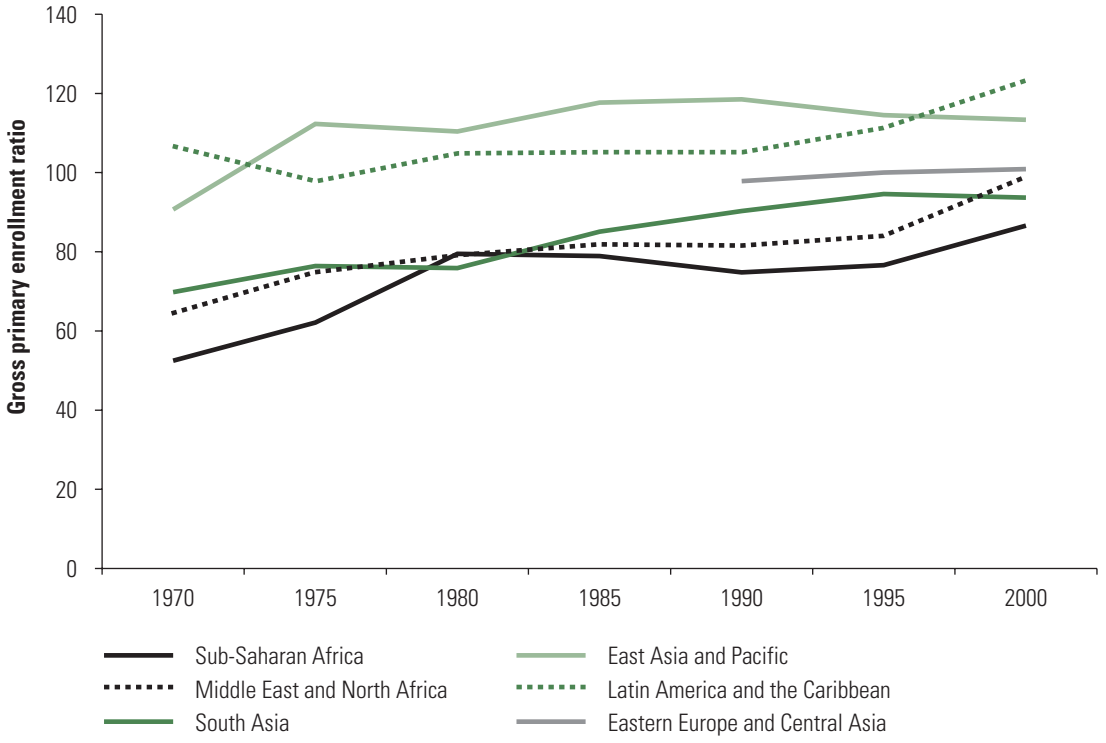
Among children already enrolled in primary school, learning outcomes have often been low—in some cases disastrously low—reflecting widespread ineffectiveness in teaching and learning processes. National test data from Bangladesh, Brazil, Ghana, Pakistan, the Philippines, and Zambia all show a majority of those who leave primary school to be achieving well below their countries' minimum performance standards, with results in many low-income, rural areas being "only marginally better than for children who have not completed school" (Watkins 2001, p. 105).[4] Such results are echoed in the United Nations Educational, Scientific, and Cultural Organization's *EFA Global Monitoring Report,* aptly subtitled "The Quality Imperative" (UNESCO 2004).

For those enrolled, low learning outcomes are widespread.

The Evolution of World Bank Policy on Primary Education

The World Bank's commitment to universal primary education dates back to its 1980 *Education Sector Policy Paper*, which emphasized for the first time the relatively high rates of return to primary education (World Bank 1980).[5] The Bank's 1990 policy paper, *Primary Education,* portrayed primary education as the foundation of a country's human capital development (World Bank 1990). It concluded with a challenge to developing countries and to itself:

Figure 1.1: Trends in Gross Primary Enrollment Ratios by Region, 1970–2000



Sources: UNESCO Statistical Yearbook (1999) for 1970–95 for all Regions except Europe and Central Asia and *World Development Indicators* (World Bank 2004h) for that Region and the year 2000.
Note: The gross primary enrollment ratio (GER) is defined as the number of children enrolled in primary school as a percent of the primary school-age population. It can exceed 100 because of the enrollment of over-age children, due to late enrollment or repetition. The net primary enrollment ratio (NER), which is the number of children enrolled of primary school age as a percent of the primary school-age population, is always lower and cannot exceed 100. None of the Regions has achieved an NER of 100.

"adequate funding of a good-quality primary education system that is widely and equitably available is … a critical priority for both national budgets and external aid." The twin policy objectives of more equitable access and improved student learning set a pattern for all subsequent policy papers. It was this focus that the Bank took to the first Education for All (EFA) conference, held in Jomtien, Thailand, in 1990, where nations and development agencies committed to "meeting basic learning needs" of children and adults.[6] While the resulting World Declaration on Education for All committed to achieving universal primary education by the year 2000, it underscored that the ultimate objective of these efforts is learning:

> Whether or not expanded educational opportunities will translate into meaningful development … depends ultimately on whether people actually learn as a result of those opportunities, i.e., whether they incorporate useful knowledge, reasoning ability, skills, and values. The focus of basic education must, therefore, be on actual learning acquisition and outcome, rather than exclusively upon enrollment, continued participation in organized programmes, and completion of certification requirements.[7]

Equitable access and improved learning were early Bank policy concerns.

In a 1995 review of *Priorities and Strategies for Education* (World Bank 1995), the Bank gave top priority to "basic" education, which included but was not limited to primary education, emphasizing sectorwide policy reform; equity of access for the disadvantaged (girls, the poor,

The second Education for All conference prioritized improved learning outcomes.

ethnic minorities, the disabled, and those in remote or hardship areas); and institutional development, including the capacity to measure learning outcomes (see box 1.2). A new *Education Sector Strategy Paper* in 1999 reaffirmed the commitment to basic education—especially for the poorest and for girls—and to systemic reform (World Bank 1999).

Subsequently, the Bank supported the Dakar Framework for Action that was the result of a second EFA conference, the World Education Forum, held in Dakar, Senegal, in April 2000 (UNESCO 2000). The Dakar Framework resulted in a renewed global commitment to primary education, not simply to improved access and quality of instruction, but to equitable achievement of learning outcomes. Specifically, it advocated:

The education MDGs emphasize primary school completion, not learning outcomes.

- "Ensuring that by 2015 all children, particularly girls, children in difficult circumstances, and those belonging to ethnic minorities have access to and complete free and compulsory education of good quality
- 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
- Improving all aspects of the quality of education so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy, and essential life skills" (UNESCO 2000, p. 8)

In 2000 the Bank also endorsed the Millennium Development Goals (MDGs). The goal for education overall was to ensure "that by 2015 children everywhere, boys and girls alike, will be able to complete a full course of primary education," plus a push for gender equity in access, and literacy for youth age 15–24. However, unlike both the 1990 World Declaration on Education for All and the 2000 Dakar Framework for Action, *the MDGs primarily address the issue of access to primary education and do not include an explicit goal with respect to either the quality of instruction or to learning outcomes, such as literacy or numeracy*.

In 2002, the World Bank and other regional, bilateral, and international development agencies established the Education for All–Fast-Track Initiative (FTI) as a means of accelerating progress toward the MDG of universal primary school completion by 2015 in low-income countries (World Bank 2004d).[8] The FTI is a partnership between national governments and donors. Countries can qualify for FTI support by submitting a Poverty Reduction Strategy Paper (PRSP) or the equivalent and a national education plan, both of which prioritize universal primary education.[9] Countries are also expected to commit to monitorable policy, service delivery, and financing targets using "benchmarks" specified in the Indicative Framework (see Appendix E).[10] In return, donors are expected to scale up technical and financial resource mobilization to support these country-driven programs and to harmonize their support.[11]

Box 1.2: Primary, Basic, and General Education

For the purposes of this evaluation, *primary education* is defined as the "general school education at the first level [plus non-formal education at this level], programs designed to give skills in numeracy and literacy and to build the foundations for further learning." Depending on the conventions in a country, this would include the first five to eight years of formal education. The term *basic education* includes primary instruction but can also cover a broader set of educational programs, including lower secondary education, early childhood education, adult literacy, and life-skills or nonacademic nonformal education programs. More recently, project designers inside and outside the Bank's Education Sector have begun using the term *general education* to define the content of education projects, a term that is sometimes used interchangeably with primary education or to describe projects covering more than four subsectors of education.

The Bank's 2005 *Education Sector Strategy Update*, which incorporated some early findings from this evaluation, committed the Bank to maintaining momentum on EFA and the MDGs, while at the same time strengthening "education for the knowledge economy" (secondary, higher, and lifelong education; World Bank 2005b). The sector plans to work through the FTI to maintain momentum on EFA in the low-income countries. It strongly supports strengthening the results orientation of the sector (greater attention to education outcomes), suggesting that key education outcome indicators be included in all new Bank country-level planning documents (Country Assistance Strategies).

Over the 15-year period in which primary education has been a priority for the Bank, policy objectives have been remarkably stable and can be summed up as follows: universal primary school enrollment (and, more recently, completion); equality of access for girls (gender parity) and other underserved groups; and improved learning outcomes. Because universal enrollment and completion assume equity of access, there are really two policy objectives: universal enrollment and completion, and improved learning outcomes.[12]

Evaluation Objectives and Design

The overall objective of this evaluation is to assess the development effectiveness of World Bank assistance to countries in their efforts to improve their basic knowledge and skills base through the provision of quality primary education to all children, particularly since the beginning of the EFA movement in 1990.

While the global EFA strategy advocates many channels for pursuing its learning goals, including schooling at the primary and lower secondary levels, nonformal education, early childhood development, adult literacy, and life skills programs, this evaluation focuses on Bank support for publicly provided primary education. This is not to deny the importance of the other channels, but reflects the fact that primary education has been the main vehicle of the Bank's assistance to EFA and that IEG has yet to conduct a comprehensive evaluation of the effectiveness of Bank support to this subsector. The Bank's project support for adult literacy programs has been previously reviewed (Abadzi 2003), as has its support to secondary education (Perkins 2004); and a review of support for early childhood development is being planned. An evaluation of support to primary education—by applying findings and lessons to the key assumptions and strategies of current programs—has the potential to substantially influence the strategic agenda and effectiveness of future policies aimed at the EFA goals, especially basic knowledge and skills acquisition for all.

The Fast-Track Initiative was created to accelerate attainment of the MDGs.

The key questions addressed by this evaluation are the following:

- To what extent have the Bank's policies for primary education been implemented?
- How effective and sustainable have Bank-supported programs in primary education been in helping countries increase access to schooling and improve learning outcomes, especially for the most disadvantaged among and within countries?
- To what extent has support to primary education promoted institutional development?
- What are the lessons from experience, in terms of key factors or determinants of effectiveness of the Bank's assistance for primary education?

The Bank's policy objectives over 15 years consistently emphasized improved access and learning.

The evaluation traced the World Bank's support to countries through the results chain, from Bank inputs (such as finance, policy dialogue, and analytic work) to government inputs (policies and plans, public spending, and institutional capacity), to educational system inputs/service delivery (for example, classrooms, textbooks, trained teachers, and supervision/community involvement), to outputs (primary school enrollments and completion), to outcomes (basic knowledge and skills acquisition, and

The Bank's main contribution to EFA has come through its support to universal primary education.

Box 1.3: Evaluation Building Blocks

- **Literature reviews** of (a) the rationale for investing in primary education and (b) the determinants of primary education outcomes in developing countries (Boissiere 2004a, b).
- **Review of World Bank documents** on primary education policy, project design and completion reports, education sector retrospectives (annual reports), research and policy dialogue reports, plus IEG evaluations of related sectors and subsectors.
- **An inventory and review of the portfolio of primary education projects** sponsored by the Education Sector of the Bank and by other sectors, covering more than 700 Bank-financed projects in more than 100 countries in a general way, and for more in-depth analysis, a random sample of 30 primary education investment projects (20 completed and 10 ongoing), 5 Education Sector adjustment projects, and 15 adjustment and investment projects managed by other sectors that allocated the most to primary education (IEG 2004d). Together these 50 projects comprise the portfolio sample.
- **Field-based evaluations of completed primary education projects:** Project Performance Assessment Reports (PPARs) in Honduras, India, Niger, Uganda, Uruguay, Vietnam, and the Republic of Yemen, and an impact study on basic education in Ghana.
- **Field-based country case studies** for an in-depth, contextualized view of the impact of the entirety of the Bank's lending, analytical work, and policy dialogue on primary education in Mali, Pakistan, Peru, and Romania. (See Appendix F for more details on case study selection and methods and Appendix G for summaries of the case study reports.)

welfare/employment outcomes).[13] A full description of the analytic framework, the evaluation design, and instruments is in Appendix B. Note that learning outcomes (basic knowledge and skills) are the ultimate results in the "results chain" but that access to and completion of primary education of good quality are among the major inputs to achieving them.

This approach resulted in a number of discrete activities or intermediate outputs that served as building blocks for the evaluation (box 1.3), most of which can be accessed in the evaluation Web site (www.worldbank.org/ieg/education). The evaluation also builds on the findings of a joint evaluation of donor support to basic education, conducted in 2003 with 12 other donors and led by the Netherlands (Joint Evaluation 2003).[14]

The next chapter provides an overview of the evolution of the portfolio of lending and analytic work, with respect to their magnitude and geographic distribution, objectives, the activities supported, and overall performance in meeting their objectives.

Chapter 3 examines in depth the experience of Bank support in helping countries meet the central objectives of improving both access to primary education and learning outcomes. This rich experience not only points to key accomplishments and shortcomings but also to key lessons for countries and the Bank in enhancing the performance of primary education systems.

Chapter 4 examines Bank support to countries in improving sector management and governance in their pursuits of better educational outcomes.

Finally, Chapter 5 presents the study's main conclusions and recommendations.

Chapter 2: Evaluation Highlights

- Primary education commitments increased dramatically with the EFA movement in 1990, especially in low-income countries.
- A growing share of lending for primary education has been managed outside the Education Sector.
- Projects managed by other sectors focus mainly on increased enrollment.
- Only one in five primary education projects has learning outcomes as an explicit objective.
- A large share of analytic work in education covers primary education, but little of it focuses mainly on learning outcomes.

Trends in World Bank Support to Primary Education

New financial commitments to primary education jumped dramatically in the early 1990s as the World Bank embraced the EFA movement. Total lending for primary education for the 27 years leading up to 1990 was about $1.7 billion.[1]

Evolution in Lending for Primary Education

In the five years after the 1990 EFA conference and the *Primary Education Policy Paper* (World Bank 1990), the number of projects supporting primary education roughly doubled and commitments more than tripled (figure 2.1). During the five-year period beginning in 2000, the year of the second EFA conference, the number of projects continued to climb, but new financial commitments leveled off. In 2005, the first year in the current five-year period (not shown in the figure), the number of projects continued to increase, but the commitment levels remained flat.[2] In all, between 1990 and 2005, lending for primary education increased sevenfold above previous years, to about $12.3 billion. Thus, around 88 percent of all Bank commitments for primary education have been approved since 1990.[3]

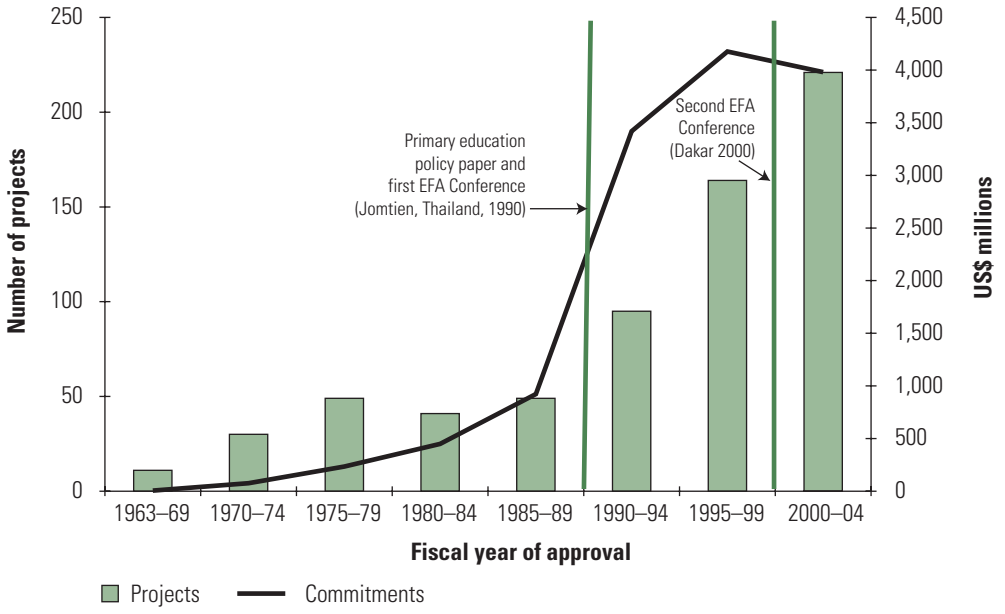
The share of primary education commitments going to the countries accounting for the poorest 40 percent of the global population has also more than doubled, from 26 to 54 percent, consistent with the Bank's strategy (IEG 2004d).[4] About two-thirds of projects that provide any support to primary education have been in the form of International Development Association (IDA) credits, rising from 59 percent before 1990 to 74 percent in 2000–04.

Education for All drove primary education commitments to new highs in the 1990s.

Primary education commitments rose in all Regions, most noticeably in Latin America and the Caribbean, South Asia, and Sub-Saharan Africa (figure 2.2). Lending for primary education did not increase significantly in Europe and Central Asia until 1995–99, following the break-up of the former Soviet Union, while it initially declined in the Middle East and North Africa before recovering in 2000–04. Latin American and South Asian countries have borrowed the most for primary education ($4.4 billion and $3.6 billion, respectively), followed by Sub-Saharan Africa ($2.6 billion), but Sub-Saharan Africa had the largest number of projects financing primary education (table 2.1).

A growing share of lending for primary education has been through projects

Figure 2.1: Increase in World Bank Commitments to Primary Education, 1963–2004



Source: World Bank database of projects managed by the Education Sector.

Notes: a. The World Bank fiscal year runs from July 1 to June 30; for example, fiscal year 2000 covered July 1, 1999, to June 30, 2000. b. This figure includes projects in all sectors with any primary education expenditure—half of commitments coded as general education were assumed to be for primary education. c. The entire commitment for a project is allocated to the year the project was approved. d. In fiscal 2005 a total of 70 projects with an estimated US$818.4 million in commitments to primary education was approved.

Much of the growth in primary education lending has been in projects managed by sectoral units other than the Education Sector.

managed by other sectors and for development policy lending (DPL).[5] For the most recent five-year period, 31 percent of all commitments to primary education were from com- ponents of projects managed by other sectoral units (see figure 2.3). In fiscal 2005 the share reached 53.5 percent.

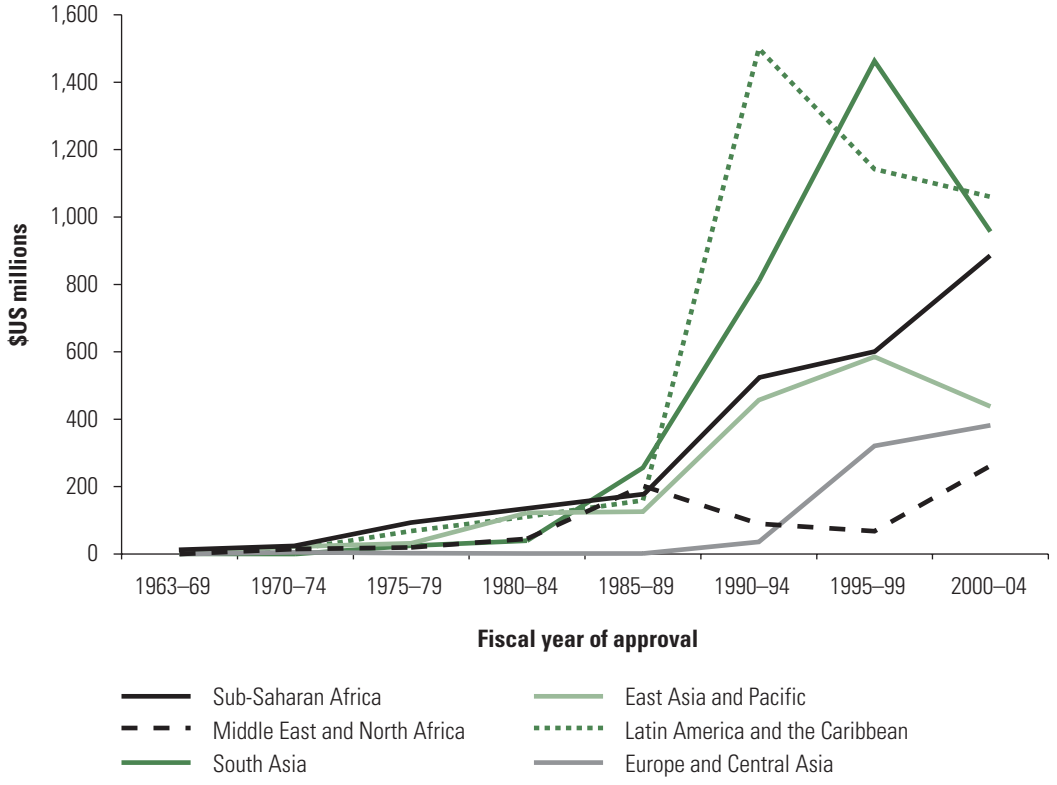
Projects managed by the Education Sector that were approved in fiscal 2000–04 remain predominantly traditional investment projects, as in previous periods.[6] However, among the 31 percent of commitments managed by other sectors, nearly half (15 percent) are development policy lending (including PRSCs [3 percent]),[7] 11 percent are for social funds or community- driven–type projects, 4 percent are for other investment projects, and 1 percent for emergency lending.[8]

Many of the projects from other sectors have small primary education components.

The dramatic increase in primary education commitments managed by other sectors is due to a proliferation of projects with relatively small primary education components. As can be seen in figure 2.3, the number of newly approved projects with primary expenditure managed by the Education Sector has stabilized at about 70 per five-year period, while the number managed by other sectors has increased every period since 1990. That accounts for more than two-thirds (69 percent) of projects with any primary education spending in 2000–04.

The projects managed by other sectors committed, on average, $8 million to primary education, while those managed by the Education Sector had primary education commitments of about $40–$55 million each.[9] Only 2 percent of the 343 projects with any primary education expenditure managed by other sectors since 1963 allocated half or more

Figure 2.2: Increase in New Commitments for Primary Education, by Region



Sources: World Bank databases, one for projects managed by the Education Sector and a second for projects managed by other sectors.

Notes: Includes projects in all sectors with any primary education expenditure; half of commitments coded as general education were assumed to be for primary education. The entire commitment for a project is allocated to the year the project was approved.

of project commitments to primary education. Among projects with any primary expenditure managed by the Education Sector, however, the figure was 49 percent.

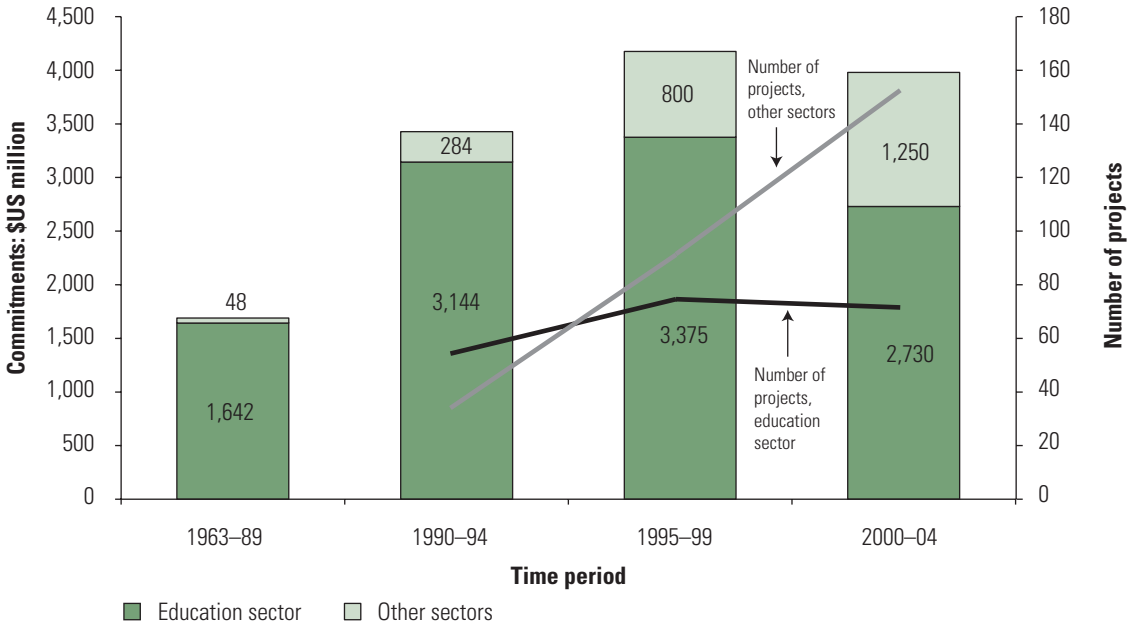
The shift in the composition of the portfolio from primary education investment projects managed by the Education Sector to smaller primary education components managed by other sectors and to policy-type lending has potential implications in several areas: the relevance of primary education lending to sector policies and strategies; the adequacy of supervision, monitoring, and evaluation; and the effectiveness and impact of primary education lending.[10]

Table 2.1: Cumulative Projects and Commitments for Primary Education, 1963–2005, by Region

	Sub-Saharan Africa	Latin America and the Caribbean	South Asia	East Asia and Pacific	Middle East and North Africa	Europe and Central Asia	Total
Number of projects approved	280	176	65	84	57	68	730
New commitments (millions of nominal US$)	2,619	4,356	3,649	1,886	760	814	14,084

Source: World Bank database.

Figure 2.3: New Commitments to Primary Education by Managing Sector



Sources: World Bank databases, one for projects managed by the Education Sector and a second for projects managed by other sectors.

Note: Includes projects with any primary education expenditure; half of commitments coded as general education were assumed to be for primary education.

However, many of the projects approved in the most recent period are still active, and few of the completed policy-type lending operations have been independently assessed.[11] Thus, this evaluation has not been able to assess fully and systematically the relative advantages and disadvantages of these different approaches, the management of primary education lending by other sectors, or the differential impact of various kinds of projects on learning outcomes.

Also, in recent years an increasing number of countries have begun to integrate their education reform efforts through sectorwide planning and program support (as opposed to project support) from donor agencies. A sectorwide approach (SWAp) to financial assistance has become a growing feature in the Bank education portfolio—for example, in its support to primary education in Uganda and in India (not yet evaluated). However, there is no particular Bank instrument for this approach. In some places the approach consists of a mix of adjustment and investment instruments. See box 2.1 for a description of the Bank's sectorwide approach in Uganda.

Lending for primary education grew, while that of other education subsectors fluctuated or fell.

Since 1990 the share of Bank education lending allocated to primary education has increased, while that to some other subsectors, particularly vocational education, has diminished. Figure 2.4 shows the funding commitments over five consecutive five-year periods. Most striking is the strong growth of funding for the sector as a whole, until the downturn in 2000–04.

Concerning subsector support, until 1990 education lending was predominantly for tertiary and vocational education, a reflection of the Bank's focus on manpower planning and technical skills development. The early 1990s saw a massive shift to primary education (already under way in the late 1980s), reflecting the growth of the poverty-alleviation agenda and the Bank's support for the EFA movement.

This continued until 2000–04, when its

Box 2.1: Sectorwide Lending Support in Uganda

In 1996 Uganda's President Museveni made a pre-election commitment to eliminate primary school fees for up to four children in each family as of the new school year, ushering in what is now called the *big bang approach* to universal primary education. The policy almost doubled primary school enrollments in 1997.

To help the Ministry of Education and Sports cope with this enrollment explosion, the government and the Bank quickly prepared a sectorwide program in 1988, called the Education Sector Adjustment Credit (ESAC). The project aimed to improve the efficient use of public resources and the availability of quality inputs, and to strengthen sector management. ESAC funds, combining an IDA credit of $80 million and a Highly-Indebted Poor Country (HIPC) debt-reduction grant of $75 million, were disbursed annually in the form of budget support. The ESAC acted as a catalyst for a group of funding agencies working together in budget support to the sector.

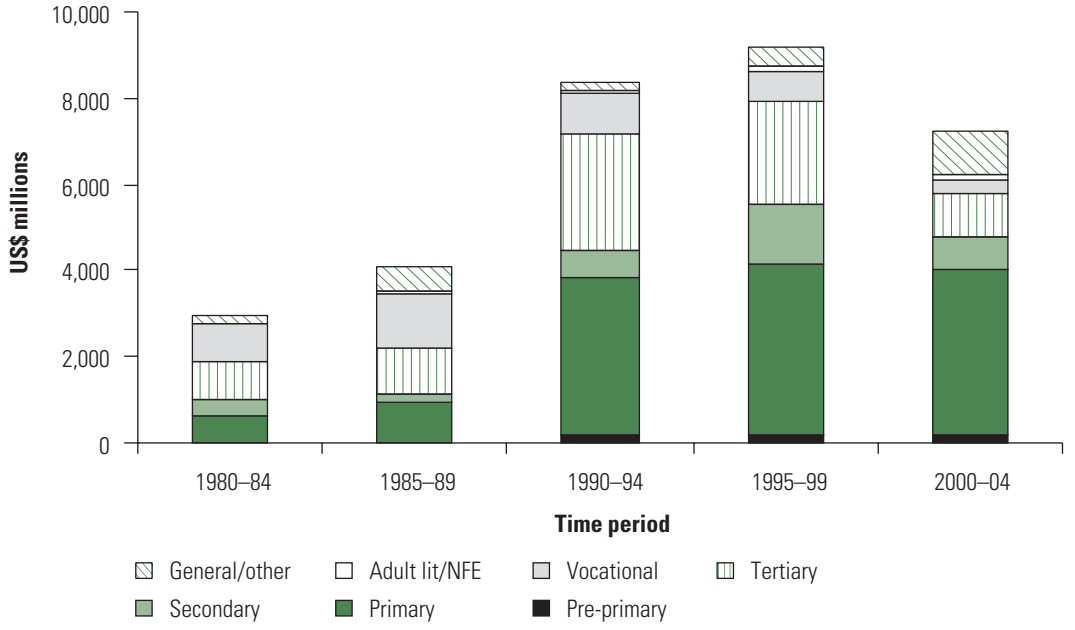
An IEG evaluation of ESAC found that the project was successful in partially mitigating the effects of the explosive expansion on education quality. Ultimately, however, ESAC targets for reducing pupil:teacher and pupil:textbook ratios were not met, largely because of unanticipated, continuing growth in enrollments. From the evidence available, the rapid expansion of enrollments led to a deterioration in both education quality and learning outcomes.

A more conventional Bank investment project, the Primary Education and Teacher Development Project (PETDP), had already been under implementation for five of its seven years when ESAC was launched. With the new sectorwide project, PETDP was re-energized and reoriented to the new universal primary education effort.

In the end, ESAC and PETDP became mutually supportive. ESAC is highly regarded for its role in improving sector planning and budgeting functions, but PETDP was considered essential as a source of innovative ideas and training.

> Rapid expansion of inputs, financed through ESAC, depended on development over time through PETDP of systems for teacher development, textbook procurement, classroom construction, and some capacity to further develop and manage these systems. *It has not yet been demonstrated in Uganda that capacity and institution building needs in the sector can be sufficiently addressed through budget support alone* (IEG 2004c, p. 28).

Figure 2.4: Education Commitments by Subsector and Time Period



Sources: World Bank databases, one for projects managed by the Education Sector and one for projects managed by other sectors.

Note: This covers education lending from the education and other sectors; half of commitments coded as general education were assumed to be for primary education.

commitments stabilized, compared with all other subsectors, except general education, in which they fell. Commitments to vocational education fell steadily from 1990 onward; those to secondary and tertiary have waxed and waned. Commitments to general education increased, as a reflection of the above-mentioned increase in lending from outside the education sector.

Government financial commitment to primary education has also increased in many countries, often influenced by Bank policy development support. Among the 12 countries where IEG conducted field studies, half increased primary education's share of total public education expenditure between 1995 and 2003. Three of them—India, Mali, and Niger—did so by 15–35 percentage points. In three countries the proportions stayed the same, and in two others the proportions declined.

Government financial commitment to primary education has also grown.

During the late 1980s and 1990s, government financial commitment to primary education became one of the focal points of World Bank adjustment (development policy) lending in many countries. In all four African countries studied—Ghana, Mali, Niger, and Uganda—adjustment projects were launched in which lending conditions included moving or holding expenditures in primary (or basic) education to a relatively high level (40–60 percent of total). All four countries met or exceeded their adjustment targets, despite political and economic challenges, which shows how seriously these conditions were taken.[12]

Evolution of Objectives, from Expansion to Learning Outcomes

Investment projects managed by the Education Sector that were mainly concerned with primary education had multiple objectives. Table 2.2 presents the most frequently cited objectives of 30 randomly selected projects that allocate at least half of commitments to primary education, among those that had closed since fiscal 1995 or that were still active as of the end of fiscal 2004.

Almost all projects address sector management and education quality.

For the purpose of this evaluation, the term *primary education project* refers to investment projects managed by the Education Sector that allocate at least half of all commitments to primary education. The 20 closed projects in table 2.1 were approved during the period 1988–96, and the 10 active projects were approved roughly a decade later, from 1998 to 2004.

The objectives most frequently cited—found in virtually all primary education projects—were to improve sector management or governance and to improve the quality of education. Whereas in completed projects, quality of education was mostly indicated by increases in inputs (books and materials) and outputs (trained teachers), ongoing projects have also included learning outcomes as indicators of quality improvement.[13] In addition, roughly two-thirds of all projects aimed to expand enrollments and improve equity with respect to gender, urban-rural residence, the poor, the disabled, or otherwise disadvantaged children.[14] A little more than half attempted to improve the "internal efficiency" of primary education systems by reducing repetition and dropout rates.[15] These objectives were remarkably stable across both completed and active projects.

Only one in five primary education projects had an explicit objective to improve learning outcomes or basic skills. This was equally true for both completed and ongoing projects. A separate review of appraisal documents covering the 23 primary education projects managed by the Education Sector and approved in fiscal 2005 and most of fiscal 2006[16] found, again, that only about one in five projects (22 percent of the total) had an explicit development objective to improve learning outcomes.

Adjustment and development policy lending projects that support primary

Table 2.2: Objectives of Education Investment Projects that Allocate at Least 50 Percent of Expenditure to Primary Education (percent of projects with objective)

Stated objective	Projects completed since fiscal 1995 (n = 20)	Active projects (n = 10)	All projects (n = 30)
Improve sector management or governance[a]	95	100	97
Improve educational quality[b]	90	100	93
Increase enrollment	65	70	67
Improve equity[c]	60	65	62
Increase internal efficiency[d]	60	50	57
Improve learning outcomes	20	20	20

Sources: IEG 2004d, table 4, and project appraisal documents.

a. Includes sector governance, management capacity, monitoring, and evaluation.

b. Usually expressed in terms of inputs and outputs.

c. Equity with respect to gender, the poor, rural, ethnic minorities, disabled, and otherwise disadvantaged.

d. Reduced dropout and repetition.

education pursued a somewhat different mix of objectives.[17] Unlike investment projects, these projects all focused on increased enrollment, and only about 60 percent covered sectoral management. However, they were similar to investment projects in that almost all covered improved quality (again, mostly inputs and outputs), about 60 percent equity improvement, and about half improved educational efficiency.

Also, as with investment projects, few (20 percent) had learning outcomes objectives. A growing number of DPLs are multisectoral PRSCs, of which 28 in 18 countries (some having multiple PRSCs) had a basic education focus approved by the Bank during fiscal 2001–05.

Among these projects, about 61 percent covered quality improvement or service delivery. About 45 percent covered improving access and increasing or maintaining funding for education (or primary education). In only two countries, Nicaragua and Uganda, were learning outcomes emphasized.

Investment projects containing primary education managed by other sectors were almost entirely focused on improved enrollment and equity objectives. Sixty percent of these had equity improvement as an objective, and half cited increased enrollment. Only 30 percent had an objective of raising educational quality; and just one in five aimed to improve sector management. None had learning outcomes objectives.

Only one in five projects aims to improve learning outcomes.

Primary education projects since 1990 allocate less to "hardware" and more to "software." In the 1960s, 1970s, and into the 1980s, the Bank emphasized "hardware" (civil works and goods, including distribution of textbooks).

Projects managed by other sectors aimed to increase enrollments and equity, but not learning outcomes.

In response to research showing the influence of curriculum reform, better teaching, good management, and community involvement (Lockheed and Verspoor 1991; Fuller 1987),[18] emphasis in the 1990s shifted to software (services and management) and, within hardware, from civil works to textbooks. Civil works and textbooks were financed in 93 percent of the projects, but the share of hardware in

Education infrastructure now gets only slightly more than curriculum, teaching, management, and community involvement.

overall project expenditures has declined from 82 percent before 1990 to 53 percent in fiscal 2000–04. The share for textbooks increased from about 2 percent before 1990 to about 11–12 percent in the early 1990s and has been maintained, while the share of civil works in primary education commitments has declined by half, from 45 percent to 22 percent.

Bank-Supported Analytic Work

Analytic work related to primary education and financed by the Bank's Education Sector stabilized during fiscal 2000–05 at about 17 products per year (see table 2.3).[19] This covers roughly two-thirds to three-quarters of all analytic work managed by the Education Sector during those years. Much of this work was conducted in the context of sectorwide reviews. A few studies (14 of 103 in this 6-year period) focused exclusively on problems arising in primary education—either in a specific country or in the context of regional or global primary education papers.

A large share of education analysis is on primary education.

The analytic work is rarely focused primarily on learning outcomes.

Bank-sponsored analytic work on primary education has rarely put its main focus on learning outcomes. Among the 14 studies delivered in fiscal 2000–05 that focused exclusively on primary education, only three contained in-depth assessments of learning outcomes.[20] The others focused on primary education strategy, finance, curriculum, and enrollments. The 89 studies touching on primary education as part of the overall education agenda covered topics such as national education strategies and reforms, finance and cost-effectiveness, teacher training and incentives, private education, decentralization, textbook quality, community involvement, education management, and girls' education.

Only three of these sectorwide papers, all managed by the Latin America and Caribbean Region, had as their major focus learning outcomes and achievement.[21] In the Africa Region, the Human Development Sector has sponsored more than a dozen Country Status Reports (CSRs) in education and health as inputs into debt-reduction decisions, sector plans, PRSPs, and PRSCs.

Initially (1999–2000) the CSRs did not cover learning outcomes, but they subsequently did showcase some student achievement measures in relation to funding levels and, in some cases, school and socioeconomic status. However, using these measures in planning

Table 2.3: Analytic Work on Primary Education Managed by the Education Sector, Fiscal 2000–05

	Analytic work exclusively on primary education		Analytic work on education, including primary					
Fiscal year delivered	Country level	Regional or global	Country level	Regional or global	Total analytic work with any primary	Total analytic work	Percent of total exclusively primary	Percent of total w/any primary
2000	3	0	9	7	19	24	13	79
2001	0	0	9	0	9	13	0	69
2002	1	2	13	4	20	25	11	74
2003	1	2	12	0	15	23	13	65
2004	1	0	15	4	20	33	5	61
2005	4	0	11	5	20	26	15	77
Total	10	4	69	20	103	146	10	71

Sources: World Bank 2002a, 2003a, 2004a, 2005a, and the Education Sector Web site (http://education.worldbank.org).

still appears to be problematic: in Madagascar, Mozambique, and Rwanda, which have completed CSRs that addressed learning outcomes and which subsequently launched new PRSCs, there is no mention of learning outcomes in the PRSCs.

Much analytic work sponsored by other sectors of the Bank also is relevant to primary education—for example, in public expenditure reviews, country economic memoranda, and poverty assessments, generally sponsored by the Poverty Reduction and Economic Management Network. When this work is added to the Education Sector work, the volume of analytic work relevant to primary education during 2000–05 more than doubles.[22] However, here too there is little work with direct relevance to learning outcomes. Likewise, this evaluation's case studies in Mali, Pakistan, Peru, and Romania (see box 2.2) showed little explicit coverage of learning outcomes in the Bank-supported analytic work related to primary education.

Performance Ratings of Primary Education Projects

All Bank-financed projects are subject to self-evaluation shortly after they are completed. These evaluations are then validated by IEG. Projects are rated on their outcomes in relation to their objectives, sustainability, and institutional development impact.[23] Table 2.4 summarizes the ratings for primary education projects.[24]

Overall, the outcome of 82 percent of primary education projects was rated moderately satisfactory or better. These ratings are above the average for the rest of the education sector (78 percent) and substantially higher than the average for all sectors (72 percent). Ratings for sustainability were lower, with 62 percent rated

Eighty-two percent of primary education projects have been rated moderately satisfactory or better on outcomes.

Box 2.2: Analytic Work in Case Study Countries: Where Are the Learning Outcomes?

The case studies for Mali, Pakistan, Peru, and Romania all found that the Bank had supported useful analytical work relevant to primary education. They were, however, generally light in their treatment of learning outcomes.

Mali. Several studies have been undertaken emphasizing access (especially gender equity), but a comprehensive sectorwide review has yet to be done. The use of the results of analytic work has added to the credibility of the Bank team and has helped the government adopt a pattern of planning based on data. However, the Bank sector work has not focused on learning outcomes (except in a bilingual education pilot) or on the constraints to the delivery of goods to its resource-starved schools.

Pakistan. The Bank supported a sectorwide review in 1988 that set the stage for subsequent policy dialogue and lending, but this is out of date. It also supported some influential studies on specific themes, such as demand for girls' schooling and devolution of educational management. Overlooked have been studies of institutional capacity and institutional incentives. Also, the quality and accuracy of ministry data, and how to improve them, need to be studied.

Peru. Two large diagnostic studies were undertaken in 1993 and 1999 that helped to build consensus on sector improvements. The improvements subsequently appeared in Bank-supported investment and adjustment projects, emphasizing better infrastructure, bilingual education, school autonomy, teacher policy, equity, and accountability. While Bank support also built strong research and assessment capacity in the government, it did not press for a longitudinal analysis of student learning outcomes or for impact assessments of project interventions (both within the competence of local researchers).

Romania. The Bank supported sector work related to the country's economic transition, which was fed into its Education Reform Project. In 2000 a World Bank Institute case study was conducted on education decentralization, and in 2002 an Education Policy Note was released. Capacity has been built for solid student assessments, but little attention has been given to mining the outcomes data for findings related to improved policy and practice. Also, education has not been included in public expenditure reviews (except for the most recent) and is almost absent from country economic memoranda, indicating incipient but still underdeveloped intersectoral linkages and planning.

Table 2.4: IEG Ratings of Completed Primary Education Projects, by Year of Approval

	Outcome (% moderately satisfactory or better)	Sustainability (% likely or highly likely)	Institutional development impact (% substantial or high)
Fiscal year approved			
Before 1990	76	50	20
1990–94	89	66	19
1995–99	85	76	38
All primary education projects	82	62	25
(Number of projects)	(117)	(104)	(106)
All education projects excluding primary	78	66	46
All Bank-supported projects	72	50	36

Source: World Bank database, as reported in IEG 2004d.

Note: Primary education projects are defined as those managed by the Education Sector and that allocated at least half of total commitments to primary education. IEG introduced sustainability and institutional development impact ratings more recently than the outcome rating, so early projects were not rated in these dimensions. The comparison ratings for all education projects and all Bank-supported projects are for those projects that closed in fiscal 1990–2001.

likely or highly likely to be sustainable over the whole period, somewhat below the average for other education projects, but above the Bank-wide average for 1990–2001.

Over time, the sustainability ratings for primary education projects have steadily improved—about three-quarters of the most recent projects are rated likely or highly likely on sustainability. This is in contrast with the ratings for institutional development. The overall average of 25 percent of projects with substantial or high institutional development impact is well below that for the Education Sector (excluding primary) and the Bank-wide average for recent years.

The considerable improvement in institutional development ratings (to 38 percent substantial or high) in the late 1990s is encouraging, but the ratings are still lower than for other education projects. They are also low in an absolute sense, particularly given that institutional objectives figured in virtually all projects managed by the Education Sector.

These IEG ratings convey the extent to which projects achieved their overall objectives. In virtually all cases, however, there was more than one objective, and many of the projects included objectives for other subsectors.

The next two chapters take a closer look at the extent to which the Bank's primary education support has successfully met individual objectives having to do with better outcomes, such as expanded enrollments and learning achievement (chapter 3) and improved governance and institutions (chapter 4). They draw on findings from both the portfolio review and field-based project assessments, case studies, and an impact evaluation to point to successful and unsuccessful strategies, lessons learned, and the value added by the Bank's involvement.

Chapter 3: Evaluation Highlights

- Primary education projects have been effective at expanding access.
- Although projects have met their equity of access objectives in many cases, gaps between advantaged and disadvantaged children often are not closing.
- Reducing high dropout and repetition has been underemphasized.
- Projects were relatively ineffective in improving educational quality.
- Learning outcomes are generally not measured, but they have improved in some countries, even among the poor.
- Though reading is the foundation of learning, few projects support improved early reading skills.
- The optimal strategy for improving learning outcomes depends on country conditions and institutions. In the best cases, access and learning are pursued together.

3 Improving Access and Learning Outcomes for the Disadvantaged

This chapter assesses the effectiveness of Bank support for improved learning outcomes (basic knowledge and skills) among the disadvantaged as the main educational driver of poverty reduction. It also identifies lessons learned from that experience.

It begins with findings on improved access to primary education, especially for the disadvantaged, given that this is a necessary (but not sufficient) prerequisite for learning, and then addresses the effectiveness of attempts to raise learning outcomes for those in school.[1] By *the disadvantaged* this evaluation refers to those who are generally underserved by public education: primarily girls and the poor, but also ethnic minorities, the disabled, and those who live in remote or hardship areas.

Primary School Access

Most Bank-supported projects since 1990 measure "access" in terms of expanded enrollments (or enrollment ratios) and improved equity for the disadvantaged (see box 3.1). Access could also refer to primary school completion, which is what the MDGs highlight. Before 2000, this view was not frequently taken, and few countries had reliable school completion data. More often, countries and projects focused on internal efficiency measures — dropout and repetition—related to completion rates. This review therefore uses enrollment ratios, measures of equity (especially for girls and the poor), and internal efficiency to assess primary school access.

Enrollment expansion is one of the objectives supported by the Bank where efforts have been most effective. Among completed projects with increased enrollment as an objective, 69 percent fulfilled it (table 3.1). Data from the IEG field-based studies (PPARs and country case studies) show how gross enrollment rate (GER) in this group of Bank-supported countries increased an average of 19 percentage points over the past 10–12 years.

In some countries the rates have been nothing short of explosive (figure 3.1). In countries experiencing rapid growth of the school-age population (Mali, Pakistan, the Republic of Yemen), the increases in enrollment ratios are even more remarkable. Not all of this expansion can be attributed to Bank financial support—in Uganda, for example, the elimination of school fees was the driving force.

Projects have generally met their enrollment objectives.

Impact studies in Ghana and India show

Box 3.1: Measuring Primary School Access

The most widespread indicators of access are the enrollment ratios, gross and net.

- **Gross primary enrollment ratio (GER)** =

$$\frac{\text{No. of children of any age enrolled in primary school}}{\text{No. of children of primary school age}} \times 100$$

(can exceed 100, due to enrollment of over- or underage children)

- **Net enrollment ratio (NER)** =

$$\frac{\text{No. of children of primary school age enrolled in primary school}}{\text{No. of children of primary school age}} \times 100$$

(cannot exceed 100)

- **Primary school completion rate (PCR)**[a]

$$\frac{\text{No. of students completing last year of primary school}}{\text{No. of children of official graduation age}} \times 100$$

- **Gender equity or parity** is measured as the ratio between boys' and girls' enrollment ratios.

- **Internal efficiency** generally refers to—
  - **Dropout:** A child's leaving school after having been enrolled (low persistence)
  - **Repetition:** The requirement that a child repeat one or more grades.

a. There are several ways to define primary school completion. This is the definition used by the World Bank.

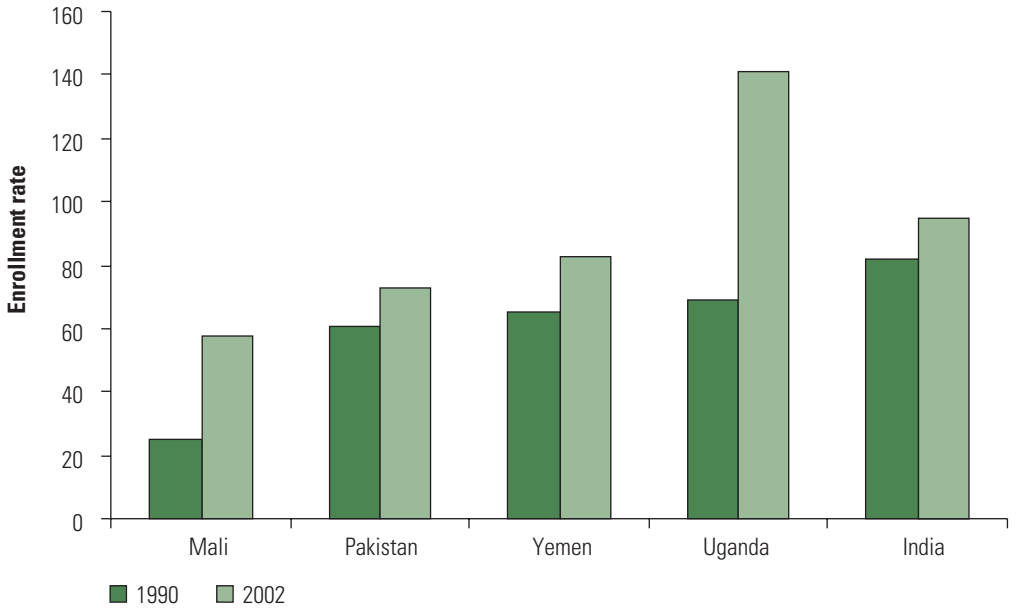
convincingly how Bank-supported projects influenced enrollment gains in those countries, largely through the provision of new or renovated facilities (in India, for hundreds of thousands of new students). Large infrastructural expansion was the pattern in most countries where IEG did fieldwork and project impact was found (IEG 2004a; Jalan and Glinskaya 2003).[2] The Bank supported not only the financing of construction costs but also the development of innovative and cost-effective building designs and construction or contracting procedures (India, Niger, Peru, Romania, Uganda, and Vietnam).

Table 3.1: Outcomes by Enrollment Objective for Completed Primary Education Projects

Objective	Number covering objective	Fulfillment of objective (percent; n = 20)			
		Fulfilled	Partially fulfilled	Unfulfilled	Undetermined
Increased enrollment	13	69	0	23	8
Improved equity	12	75	25	0	0
Improved access for girls	9	55	22	22	0
Improved internal efficiency	12	25	42	25	8

Sources: IEG 2004d, table 13, and World Bank project appraisal and Implementation Completion Reports.

Figure 3.1: Increases in Gross Primary Enrollment Ratios in Countries Receiving Bank Support



Sources: Case studies and PPARs.

Note: Data for India are for the 42 districts covered by the Bank-supported District Primary Education Project, using dates 1991 and 2001.

One model was used extensively in India, Indonesia, and other countries with good results, especially in increasing community interest in the school. It transferred funds to local school committees or councils, which then directly managed the construction or rehabilitation activities.

Much more evaluative research is needed to show whether and how contract teaching is cost-effective, equitable, and sustainable in specific settings. In many low-income countries (India, Mali, Niger, and Pakistan) the rapid provision of new schools and classrooms has been accompanied by the hiring of contract (or, in India, *para*) teachers. These teachers generally have minimal teacher training, receive a fraction of the regular teacher salary (around one-sixth to one-half), can be hired locally (generally on a year-to-year basis), and are often paid from community funds.

While this route provides governments a more affordable and flexible option for staffing their expanding number of classrooms and a way of posting local teachers in remote and hardship areas, it also lowers the financial incentives for entering teaching and reduces the job security of those so hired, especially among teachers paid by the community.

A frequent consequence of rapid enrollment expansion has been a decline in teacher qualifications.

In India critics worry about how this is eroding professional standards for teachers and creating a second tier of teachers relegated mostly to the poorer communities (Govinda and Josephine 2005). Supporters of the program point to research showing the relatively high dedication of contract teachers as measured by daily attendance (SIEMAT 2005).[3] In low-income countries, expansion of access does not necessarily involve the use of contract teachers: Ghana, Uganda, and the Republic of Yemen—all with the help of World Bank and other development agency financing—have been able to expand enrollments while at the same time improving the proportion of teachers who are fully trained.[4]

Much expansion of access has come through Bank units outside the Education Sector.

Much expansion of access has come through initiatives managed by Bank units outside the Education Sector—for example, through social funds, public works projects, and PRSCs. These initiatives bring both benefits and risks. An IEG evaluation (IEG 2004d) found social funds projects to be "remarkably successful" in supporting infrastructural expansion, especially in the building of schools. For example, in the Republic of Yemen, two completed social funds projects created places for more than 1 million students over a nine-year period. But the country's Basic Education Project, mounted in the Ministry of Education during an earlier but overlapping nine-year period, provided for fewer than 50,000 (IEG 2005e). During the same period, public works projects in the Republic of Yemen created space for another 283,000.

Likewise, Bank-supported social funds projects during the mid 1990s established 3,000 new classrooms in the Arab Republic of Egypt, enough for about 120,000 students, and 4,400 new classrooms in Cambodia, enough for about 175,000 students (IEG 2002). More recently, PRSCs have frequently emphasized expanded access: of the 28 such projects mounted during fiscal 2001–05, almost half had explicit access expansion objectives.

An important potential benefit of social funds is community ownership of the program, which means, at least in the case of the Republic of Yemen, that schools built under these programs are maintained by the community. A benefit of PRSC expansion is that it is done in the context of a broad poverty-reduction strategy, including improvements in governance and financial management.

Such programs do not emphasize learning outcomes.

A significant risk of such programs is that their focus on quantitative growth can overshadow improvements in educational quality and outcomes, including student learning outcomes. Social Funds 2000, a set of impact studies conducted by the Bank's Poverty Reduction and Economic Management Network (World Bank 2000a), showed that social funds projects have had uneven effects on "welfare" (including educational) outcomes in Bolivia, Honduras, Peru, Nicaragua, and Zambia. In three of these five countries, social funds programs resulted in no better improvement in student enrollments than control programs; in two of three, there was no relative improvement in student absenteeism. In Bolivia, the only country where student achievement was a focus, there was no better learning in social funds schools than in control schools.

This lack of attention to learning outcomes also shows up in the PRSCs. Only 4 of the 28 have included them in their objectives or performance indicators, and three of the four were from Uganda.

Reasons for this low emphasis and uneven performance on educational outcomes are often rooted in the limited scope of such projects. Social Funds 2000 suggests that discrete subprojects arise in response to a community's perceived need for infrastructure improvement "rather than being driven by the objective of achieving a specific development impact," such as an increase in basic knowledge and skills. This means that crucial complementary investments or "software inputs" (such as staff training and capacity building) related to development impact are often overlooked.[5]

The Bank's Education Sector Unit has commented on this. In its 2005 retrospective (World Bank 2005a), it reports that documents for projects managed by other sectors rarely include significant details about the education component and its relationship to the country's educational policies or goals. Frequently the lists of professionals preparing the projects do not include education specialists (World Bank 2005a).[6] PRSC documents are an example of underreporting significant education details: only 5 of 28 mentioned anything about low learning levels in the countries, even though improved knowledge and skills are the most important educational factors in poverty reduction.[7]

Another approach to enrollment expansion promoted by the Bank in Mali, Niger, and Uganda has been double-shifting, which in Africa generally means holding morning and afternoon shifts in the same school, taught by the same teacher. Opposed by teacher unions and many parents, this approach has helped to increase enrollments in Mali and Niger. However, it has also reduced scheduled instructional time by as much as 40 percent, a common explanation for poor academic performance in these countries.[8]

The Bank also supported double-shifting in the Uganda Sector Adjustment Credit of the late 1990s, but its implementation was resisted until 2004, when it began to be piloted in some districts. When it was introduced in Mali and Niger, it was not piloted, and the trade-offs between this form of expansion and the loss of instructional time were not mentioned in project risk statements.

The Bank has also supported interventions to increase the demand for primary education, where this has been a constraint to increased enrollments. In some locations expansion is constrained by demand features (high opportunity costs associated with loss of children's contribution to family income, low perceived benefits of education, and constraining cultural patterns for girls), and in some cases World Bank support has addressed these features.[9]

Of the many efforts in India to increase demand for primary education among girls, low-caste children, and tribal populations, the Bank-supported DPEPs adopted two: public awareness campaigns emphasizing the value of primary education to individuals and communities and lengthening the hours of early childhood education centers so that older girls—generally called on to mind younger siblings—could attend a full school day.[10] The former was associated with large increases in primary school enrollments during the first two years of project implementation (and then diminishing returns), the latter with marginal improvements in older girls' attendance, plus some improvement—of undetermined magnitude—in the school readiness of children who attended these early childhood programs (World Bank 2003f).

The lack of attention to quality arises from the community's focus on infrastructure.

In the Republic of Yemen and Pakistan, parental reticence to enroll their daughters was successfully addressed in Bank-supported projects by building schools for girls, recruiting female teachers, and providing scholarships (in Pakistan). These solutions were not without problems. In the Republic of Yemen, budget constraints created by structural adjustment led to the recruitment of just over half of the targeted number of female teachers. In Pakistan, the scholarship program was discontinued when project funding ended (and therefore was not sustainable). In Niger and Uganda, demand constraints were not highlighted in project planning, because there was so much pent-up demand.

Double-shifting may increase enrollment but usually cuts into instruction time.

However, pockets of low demand are now appearing, even in places where new schools have been built, which suggests the appearance of new demand constraints and the need for new solutions as countries begin to reach out to the most disadvantaged. One such solution, considered promising by many, is the use of conditional cash transfers (see box 3.2).

In some countries parents are increasingly expressing a demand for improved educational quality by enrolling their children in private schools, which they perceive to have higher standards than public schools. School surveys in Ghana showed an increase in private primary school enrollments from about 5 percent of the total in 1988 to more than 20 percent in 2003. In Mali, private school enrollments plus those in community schools—those sponsored by nongovernmental organizations (NGOs) and community groups—grew to about 25 percent of the total in 2003.

Demand for quality in education is increasingly expressed in private school enrollments.

Box 3.2: Conditional Cash Transfers: A Panacea for Reaching the Poor?

Several middle-income countries, most of them in Latin America, have raised school enrollments and health outcomes among the poor through conditional cash transfer (CCT) programs that make payments to the poorest households, provided they enroll their children in school and take them to health care providers for checkups. In Mexico, an upper-middle-income country where the primary enrollment rate was already over 90 percent, the impact of the Progresa[a] program on primary enrollment was statistically significant but small: 0.74–1.07 percentage points for boys and 0.96–1.45 points for girls, controlling for household and school characteristics.[b] CCT programs supported by World Bank projects and linked to primary education outcomes are under way in Brazil, Colombia, Jamaica, and (most recently) Turkey, among others, and will be subjected to impact evaluations (Rawlings and Rubio 2003).

The impact of CCTs on primary enrollments in low-income countries is potentially much greater. In Nicaragua, for example, an impact evaluation of the Red de Proteción Social Pilot Project found that primary enrollment in the treatment areas rose 22 percentage points higher than in the control areas, starting from a baseline enrollment rate of 68.5 percent. However, in low-income countries, cost-effectiveness, affordability, implementation capacity, and sustainability also loom large. While in middle-income countries CCTs have often replaced other, less-efficient social safety nets, in many low-income countries CCTs would present an entirely new safety net program.

To be affordable in the face of much larger need, CCTs in low-income countries likely would have to precisely target a relatively small group of the "poorest poor." The targeting mechanisms, monitoring requirements, and administrative structure of these programs are complex and generally very demanding in data and implementation capacity. Particularly in countries where the availability or quality of schooling may constrain raising enrollments or achievement, cash transfers (a demand-side intervention) may not be the least-cost way of achieving a particular outcome.

Thus, the impact of pilot CCT programs in low-income countries needs to be carefully evaluated against alternative strategies for achieving educational outcomes—be they enrollment, attendance, or learning—to assess the cost effectiveness and sustainability of alternatives. Over the next three years, the Bank's Human Development Network will sponsor impact evaluations of CCT programs in six low-income countries (Bangladesh, Burkina Faso, Cambodia, Lesotho, Nicaragua, and Pakistan), drawing on a grant from the Bank Netherlands Partnership Program, and cofinanced by ongoing lending operations.

a. Programa de Educación, Salud y Alimentación. In 2002, this program was renamed Oportunidades and its objectives were broadened.
b. Impacts on secondary enrollment and attendance were greater. However, there were no significant positive impacts of Progresa on achievement test scores compared to the control groups (Behrman, Sengupta, and Todd 2000).

Much of the recent growth in private education has been in low-cost secular schools. Such schools have also increased rapidly in number in recent years in countries such as India and Pakistan, although there are no hard data to show by how much (in India such schools are "unrecognized" and are therefore not included in government statistics).

Families, even those in the lower-income brackets, are increasingly turning to such schools under the assumption, sometimes founded and sometimes not, that they lead to better learning outcomes. In the countries visited by IEG for this evaluation there has been little information or policy discussion, either within the Bank or in the countries, about the growth and effectiveness of such schools and how the governments could best deal with their proliferation.

Equity efforts focused more on access than on learning outcomes.

Equity concerns were a prominent feature of most primary education projects. Of the investment projects in the portfolio sample (30), about two-thirds of the completed projects and about 80 percent of ongoing project had equity features. Likewise, about 80 percent of adjustment and non-Education Sector projects have equity improvement features. The main target groups for these projects have been girls and the poor, but rural and indigenous children also are target groups. The disabled were singled out in only 10 percent of completed investment projects but in 30 percent of the ongoing investment projects.

Most investment and adjustment projects with equity features were concerned with

equity in enrollments. Only about half were concerned with *equity of treatment*—eliminating bias against disadvantaged children at school. Improved equity in *learning outcomes* was a concern in only a third of completed investment projects, one-half of ongoing projects, and fewer than 10 percent of the adjustment and non-Education Sector projects. Fulfillment of the equity objectives in these projects was quite high—around 75 percent, which is not too surprising, given that they were mostly concerned with enrollment gains, which have generally been promoted effectively.

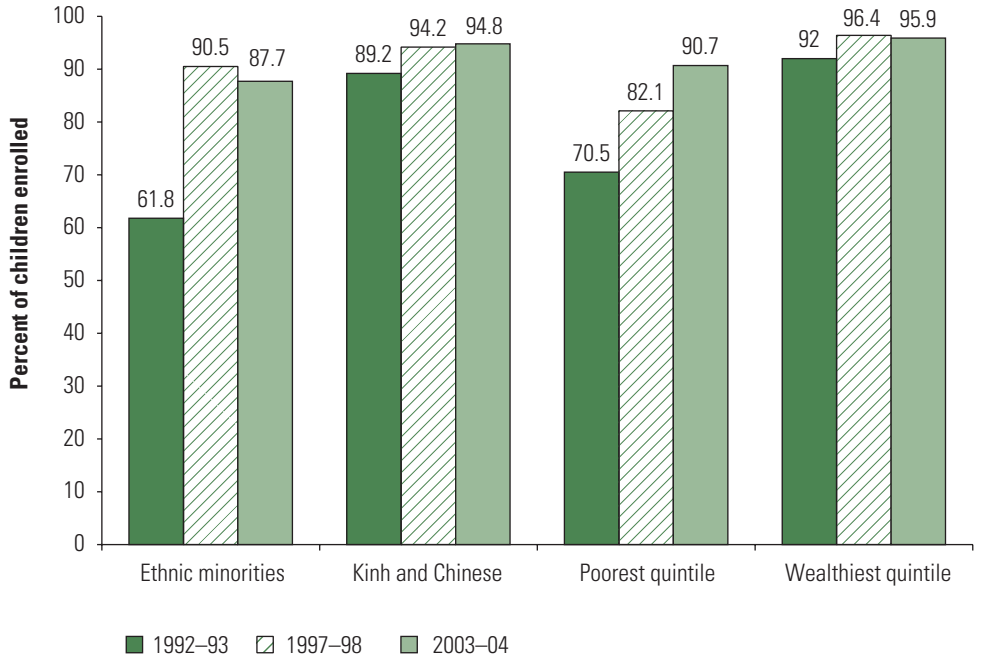
Nevertheless, there were wide differences in the extent to which gaps between the disadvantaged and more advantaged were closing. In Mali, where project expansion goals have been reached, huge differentials remain between the capital city and outlying areas. In India, enrollment gaps for girls and scheduled castes were largely closed, but not for scheduled tribes (indigenous people). More positively, in Vietnam, in parallel with the Bank-financed Primary Education Project (PEP) that emphasized improved access in underserved areas, gaps in enrollment across consumption quintiles and ethnic groups have been substantially reduced (figure 3.2).

Equity concerns featured prominently in most projects.

Equity for girls. A more detailed look at the completed sector investment projects shows that only about a third focused on gender issues. This figure is misleading, however, because in many countries gender equity had already essentially been reached. In countries with gender disparities, about two-thirds of projects had objectives addressing this. All focused on girls' access to primary education; only one (DPEP in India) also focused on closing the gender learning achievement gap.

Most of the projects with gender equity objectives (five of seven) satisfactorily met them. However, this does not necessarily mean that gender gaps are closing.[11]

Figure 3.2: Reducing Enrollment Gaps in Vietnam



Sources: IEG calculations, using data from the 1992–93, 1997–98, and 2004 Vietnam Living Standards Surveys.

Note: Kinh are ethnic Vietnamese.

In Niger, where Bank policy dialogue and financial support during the 1990s emphasized rapid increase in access to primary education, particularly for girls, the GER for girls between 1990 and 2003 increased from 24 to 36 percent. However, boys' enrollments increased by similar amounts, leaving the gender gap unchanged.

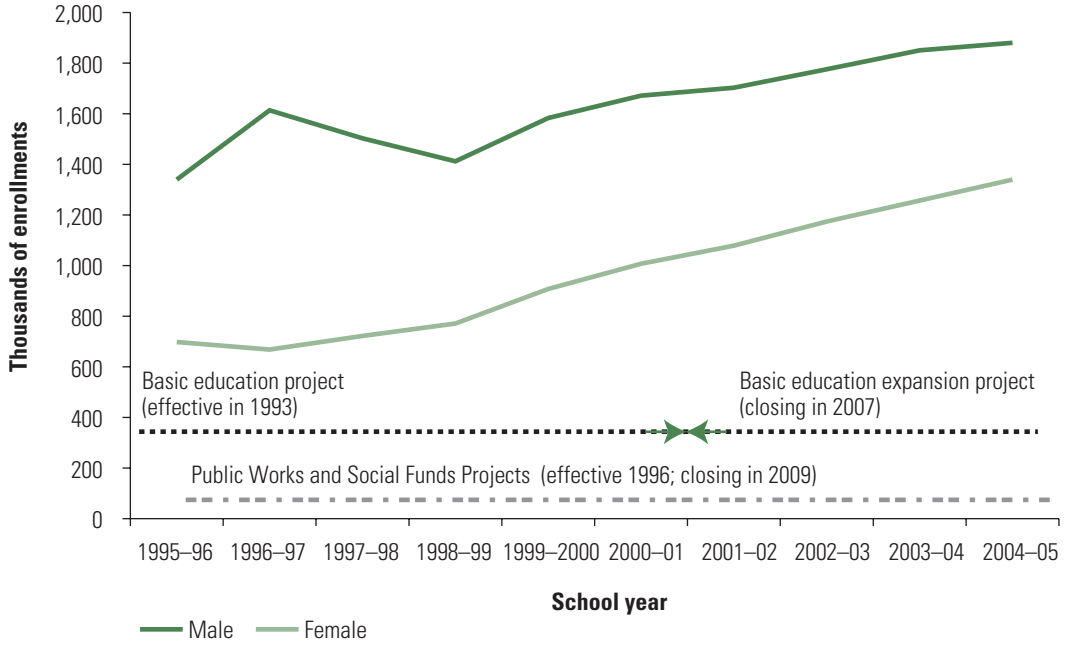
In Mali, where Bank-supported enrollment gains were dramatic, the gap between girls' and boys' enrollments actually widened. In the Republic of Yemen, over the course of two basic education projects and a series of public works and social funds projects, both male and female primary enrollments have increased (figure 3.3). The government built new schools and classrooms, deployed female teachers, provided materials, and encouraged community involvement, all to encourage higher female enrollments, especially in rural areas.

Few projects focused on improved learning outcomes for the poor.

While the relative gap in enrollments between boys and girls has narrowed somewhat, about half a million fewer girls than boys are enrolled; thus a large gender gap persists.[12] A more serious concern is the finding on how few projects are focused on closing the learning gap differential between boys and girls, which would involve addressing the biases girls often experience once they are enrolled.

Equity for the poor. Among completed investment projects in the portfolio sample, 10 were found to have objectives targeting improved equity for the poor. Because there are poor in both lower- and middle-income countries, all projects were eligible for this objective (perhaps with the exclusion of the two emergency projects). Thus, just over half of the sample projects focused on improving outcomes for the poor, a worrisome finding given the Bank's poverty-alleviation mission. Nine of ten of these projects aimed to improve access for the poor (the 10th was in Mexico, where access was not an issue).[13] Four projects included improved

Figure 3.3: Yemen: Trends in Primary Enrollments (grades 1–6) by Gender



Sources: Republic of Yemen, Ministry of Education, School Census 1998–2004, and Central Statistical Organization's Statistical Yearbook, various years.

learning outcomes for the poor, a higher incidence than with projects aimed at equity for girls, but still low.[14] In seven of the ten projects, objective outcomes were considered as having been fulfilled. Of the four covering learning outcomes, all were considered to have fulfilled their objectives, an indication that learning outcomes can be improved for the poor, if given government commitment of resources and effort.

Internal efficiency has been underemphasized even in countries with very poor records, and it is not effectively done where implemented. In relatively few of the countries where IEG did fieldwork for this evaluation did Bank-supported projects attempt to improve internal efficiency, even those countries with very low completion rates. For example, in Niger, where the Project Completion Report (PCR) reported a very low 28 percent in 2003 (despite a policy of automatic promotion to the next grade), there were no explicit internal efficiency objectives or components in completed projects supported by the Bank.

This was also true for Mali, which reports a PCR of 40 percent (2003) and Uganda, which reported a PCR of 58 percent in 2000. In Mali, teaching children initially in their first language contributed significantly to improved internal efficiency in a Bank-supported pilot, but the government has had difficulty bringing its bilingual education program to scale.

Data on dropout and repetition rates are rarely reported across family income levels or other social groupings (ethnic group and so forth). Where they are reported, substantial disparities are found: in Peru assessments covering the year 2002 show primary school completion rates for the extremely poor to be 54 percent compared with 87 percent for the non-poor (IEG 2005c). In Vietnam, nationwide primary school drop-out rates were lower than 3 percent in 1999, but in the 189 districts where 70 percent of disadvantaged people reside, they were 12 percent (World Bank 2005g). Encouragingly, in both of these countries current Bank-supported projects have prioritized the improvement of completion rates among the poor, rural residents, and girls.

Recent efforts to improve internal efficiency have not been effective.

Efforts to improve internal efficiency have not been very effective. Only 25 percent of sample projects having internal efficiency as an objective fulfilled that objective (although 42 percent did so partially; see table 3.2). Uruguay, for example, aspired to reduce its first grade repetition rate from 21 to 10 percent through Bank-supported improvements in preschool education, in-service teacher training, and supervision; however, it only succeeded in lowering it to about 17 percent.

India aspired to reduce its primary school dropout rate below 10 percent in 42 districts in the DPEP but only did so in the state of Kerala, where the dropout rate was already low. There was little discussion in DPEP documents of reasons for high dropout rates and no specific strategies for dealing with them. Recent analyses in India (Azim Premji Foundation 2004) have suggested that it is, at least in part, a consequence of low student learning gains, a finding echoed in Ghana, Mali, Niger, Peru, and Uganda. Thus, staying in school improves learning outcomes, *but good learning outcomes along the way also influence staying in school*.

Policies to automatically promote children to the next grade have also been enacted in countries such as India, Niger, and Vietnam as another way to improve internal efficiency. However, the efficiencies gained by automatic promotion might be undermined by increasing the numbers of children who complete primary school without having learned much. Niger's automatic-promotion policies lowered repetition rates, but at the end of the cycle some 30–35 percent of students had to be held back because they could not pass the leaving exam, and some dropped out at that point.

The MDGs and the Fast-Track Initiative are driving attention to enrollment increases.

The joint donor agency EFA FTI has been a strong force in encouraging rapid

increases in enrollment and completion in some low-income countries, but it has not been a force in learning outcomes. The Bank's analytical work at the time the FTI was launched in 2002 developed a standard for computing primary school completion (see box 3.3) and drew up lists of countries "on-track" and "off-track" for universal primary completion by 2015 (Bruns, Mingat, and Rakotamalala 2003). The 10 best-performing low-income countries on primary school completion were selected for creating FTI benchmarks such as pupil:teacher ratio and primary education recurrent spending as a percent of total education recurrent spending (see Appendix E). Countries that were off track for reaching MDGs were invited to apply for FTI assistance and urged to consider the quantitative benchmarks based on the average of the best-performing countries in setting their own indicative framework goals.

The 2000 EFA goal of ensuring "recognized and measurable learning outcomes" for all is not a focal point of the FTI. Thus, there are no learning achievement goals in FTI and no indicators of whether countries are on or off track in providing basic learning and skills for all. Except for the benchmark on "spending on inputs other than teachers," there are no specific benchmarks related to learning. The 2004 FTI framework document encourages countries to track student learning measures and the quality of teaching, but so far these have not become part of the indicative framework.[15]

Basic knowledge and skills must improve if primary education is to contribute to poverty reduction.

Improved Student Learning Outcomes

Basic knowledge and skills acquisition (learning outcomes)—particularly among the least advantaged students—is what enrollments and perseverance in school must be about if primary education is to contribute to poverty reduction. Surprisingly, few projects in the Bank's portfolio had specific objectives to improve learning outcomes, and until recently, few even had learning outcomes among their performance indicators.

Among the 6 of 20 completed sector investment projects that did aim to improve learning outcomes, however, 4 did so satisfactorily and one partly so (see table 3.2). Among the four, three were from Latin America (Chile, Mexico, and Uruguay), and one was from India. [16] Instead of learning outcomes, the more general objective of "improving educational quality" appears in almost all project designs.[17] On that objective, the sample projects were found to be relatively ineffective, with 39 percent fulfilling their objectives, compared with around 70 percent for expansion objectives (table 3.2).

Primary education projects approved during the past two years also rarely had learning outcomes in their objectives; few emphasized learning outcomes for the poor. As an extension to the portfolio review, the evaluation team examined objectives in the 23 projects that were approved during the past two fiscal years (2005–06). As in the portfolio sample, about one in five of these projects had

Table 3.2: Outcomes by Objective for Completed Primary Education Projects

Objective	Number covering objective	Fulfillment of objective (percent; n = 20)			
		Fulfilled	Partially fulfilled	Unfulfilled	Undetermined
Improved learning outcomes	6	67	17	0	17
Improved educational quality	18	39	27	33	0

Sources: IEG 2004d, table 13, and World Bank Project Appraisal Documents and Implementation Completion Reports.

Box 3.3: Measuring Learning Outcomes

What to measure. The 1990 EFA declaration advocated measuring both "learning tools (such as literacy, oral expression, numeracy, and problem solving) and basic learning content (such as knowledge, skills, values, and attitudes)." The 2000 EFA update prioritizes measurable learning outcomes, in terms of literacy, numeracy, and essential life skills. There is no international standard or agreement on what knowledge and skills to measure; most countries with testing programs at the primary school level cover at least knowledge and skills in language and mathematics. This evaluation has not adopted a strict definition of desired learning outcomes, preferring to use the broad and inclusive formulation of basic knowledge and skills.

How to measure learning outcomes. Countries are increasingly turning to standardized tests, which cover the same items and use the same format across the country. There are two ways of representing the results: norm-referenced (how well test takers performed relative to others) and criterion-referenced (how well the test takers performed compared with a standard of excellence, sometimes put as percent "mastery"). In addition to national assessments, some developing countries participate in internationally coordinated assessments, such as the TIMSS, the Progress in International Reading Literacy Study, OECD's Programme for International Student Assessment (PISA), or regional exams, such as those coordinated by the LLECE and the Southern and Eastern Africa Consortium for Monitoring Educational Quality.

How are results used? Sometimes standard assessments are used in a high- stakes manner to determine the academic standing (and often future educational opportunities) of all students and their schools. Increasingly, countries are choosing to conduct lower-stakes assessments, which are used to assess national/regional progress and/or to diagnose teaching effectiveness over time. Such assessments are often given to samples of schools and students episodically (for example, every second or third year).

What has the Bank supported? Since its 1990 policy paper, the Bank has had a strategy of supporting countries in collecting and reporting student achievement data. The portfolio review for the study shows the share of lending projects having assessment components increasing from less than 20 percent before 1990 to near 70 percent during 1990–94 and between 55 and 68 percent since then. Recent global support for assessment capacity building has been provided by the World Bank Institute (the training arm of the Bank) and through the ongoing Global Student Learning Assessment Initiative (funded through the development grant facility managed by the Education Network). The latter aims to help countries develop the capacity to participate in one of the global or regional assessments mentioned above. Recent early reading assessments in India (Pratham 2006) and Peru (Abadzi 2005) show that meaningful student assessments can be done quite rapidly and without the extensive institution building required for participation in a regional or international assessment.

an explicit learning outcomes objective; about two-thirds had learning outcomes within their performance indicators. Only 5 of the 15 aiming to track learning outcomes specifically mentioned an aim to track outcomes among the poorest, which will make it difficult to show whether the projects are contributing to poverty reduction. Only a quarter of them had baseline learning outcomes data prior to project approval.[18]

Fieldwork conducted by IEG found that Bank support can contribute to improved learning outcomes in both low- and middle-income countries. In only 5 of the 12 countries visited by IEG (Ghana, Honduras, India, Romania, and Uruguay) had there been repeated outcome measurements using standardized tests. Student achievement improved over time in Ghana, India, and Uruguay (see box 3.4), showing that it is not just in middle-income countries where learning improvement is possible. However, in Honduras and Romania, little improvement was noted. In Pakistan, Peru, and Vietnam, assessment systems have been established with the help of Bank-financed projects, but they have not produced results that can be compared over time.

Absolute levels of achievement, even in countries where positive change has occurred, are generally far from satisfactory, despite investment in quality improvement. Countries often set their own criteria or levels of test performance that demonstrate subject matter mastery and then measure the proportion of students

Absolute levels of achievement are generally far from satisfactory.

Box 3.4: Improved Student Learning Outcomes in Three Countries

In 2003 Ghanaian children completing nine years of basic education scored higher on tests of math and English than those completing 10 years of basic education 15 years before (IEG 2004a). Improvement was observed for children from households of all income levels, although greater improvement was found in better-off households. Also, there has been a 23 percent improvement on a standard criterion-referenced test between 1992 and 2000 in both English and math.

Math and language scores in India improved significantly over a six-year period in the 42 districts participating in the DPEP, both at the grade 1 level and the penultimate lower primary education year (grade 3 or 4). Gender disparities in achievement were generally reduced below the targeted 5 percent; some reduction was also observed for lower castes but relatively little for scheduled tribes.

On Uruguay's grade 6 assessment, students at all income levels made gains from 1996 to 2002 (project period). However, those from disadvantaged backgrounds improved significantly more than those from more advantaged backgrounds—18 and 19 percentage point improvements in language and math for the poor compared with 2 and 6 percent, respectively, among the nonpoor. National assessment results found a growing share of children receiving 60 percent satisfactory or better over the period 1996–2002. On the PISA exam, Uruguay's 15-year-olds scored above those of other participating Latin American countries.

Source: IEG 2004a, 2006a; World Bank 2003g.

reaching those levels. In Ghana, where average test scores increased over 15 years, fewer than 10 percent of students have reached the mastery level in math and fewer than 5 percent in English. In India, in 16 of 42 districts' grade 3 and 4 students were not performing at the minimum level (40 percent correct) in language, and a recent independent assessment of literacy levels revealed that almost 50 percent of 7- to 10-year-olds could not read fluently at the first-grade level.[19]

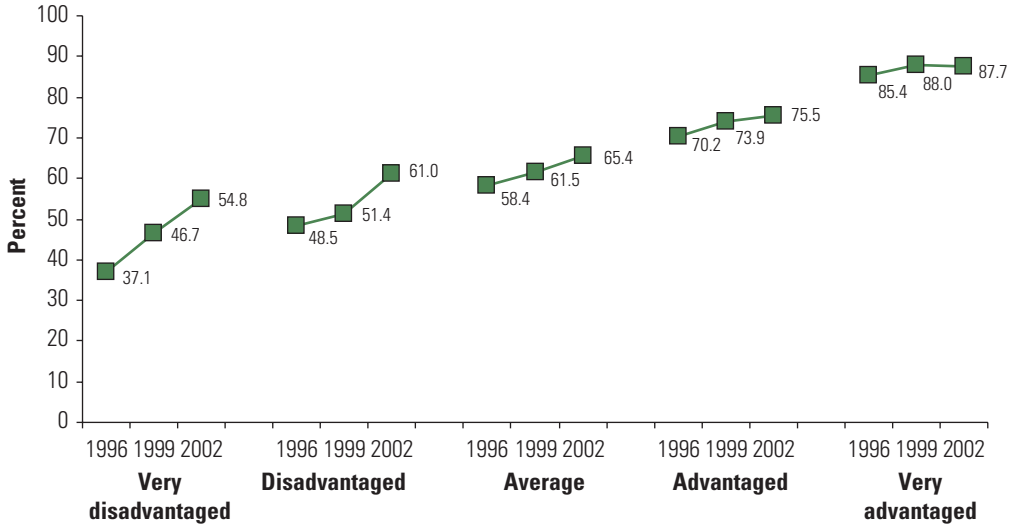
Even in Uruguay, where scores on international standard tests are above regional norms, fewer than half of grade 6 students reached mastery levels in mathematics. In countries without trend data, absolute learning levels are also very low. Mastery in French and math among grade 6 students in 1999 in Niger was 13 and 11 percent, respectively; in the Republic of Yemen, grade 6 students' mastery of Arabic and math was 19 and 9 percent, and in Peru it was 8 percent for Spanish and 7 percent for math. In Vietnam, only 51 percent of grade 5 students were found to perform as "independent readers." Mali and Pakistan have no standard test data, but were observed during IEG fieldwork to have very low student learning levels.[20]

Improving learning outcomes among the disadvantaged is possible.

There are few instances of improved learning outcomes among the disadvantaged, but those that have been demonstrated show that it is possible to close gaps. For primary education to be a significant factor in poverty reduction, it is especially important that the poor and other underserved groups acquire basic knowledge and skills. Generally, where average levels of cognitive achievement are low, the levels for the underserved are even lower. India, Peru, Romania, Vietnam, and other countries have acknowledged large differences in achievement across gender, urban/rural, and social status lines. Some countries, however, have been using Bank assistance to address this problem. Box 3.4 shows how, in the three countries where Bank-financed projects have supported improvement in achievement, learning for the disadvantaged has improved also, dramatically so in Uruguay (see figure 3.4). Also, ongoing projects in India, Peru, Romania, and Vietnam have targeted the rural poor and otherwise disadvantaged and have goals to improve learning outcomes among those groups.

Reading is considered the foundation of all school learning (Alexander, Entwistle, and Olson 2001), yet Bank-supported projects have rarely contained specific support for

Figure 3.4: Percent of Sixth Graders Performing Sufficiently on Language Examinations in Uruguay, by Income Level



Source: IEG 2006a.

improved reading skills in early grades. Common problems identified in the case studies and PPARs have been the lack of data on early primary school reading skills and failure of governments to set and track reading targets for grades 1 and 2. Box 3.5 reveals major problems with early acquisition of reading skills in two countries.

Strategies for improving learning outcomes and their effectiveness vary, depending on country conditions and constraints. The three Bank-supported countries that have registered solid learning gains have common explicit national policies and strong national commitment to improve

Box 3.5: Low Priority for Early Reading Skills: Mali and Peru

Poor reading skills in early grades (slow speed and low fluency) is hypothesized to be behind much of the poor performance that appears in achievement tests later on, as well as early dropout and repetition, particularly among the poor (see Abadzi 2005).

In Mali, poor reading levels were highlighted in the preparation of an ongoing project (World Bank 2000b) that supported a program called Reading First. This program was to prioritize reading in the first and second grades and was to be assessed against a goal of 80 percent of second graders' reading satisfactorily. In the course of project implementation, this program has been de-emphasized, and four years into the project no appropriate reading assessment instrument has been developed. During visits to a wide range of schools, case study teams could find no lower-grade children who could read sentences from their textbooks and only a few in the sixth grade who could.

In Peru, case study investigators cite a study conducted by the World Bank and local researchers in 22 low-income area schools across various geographic and cultural groupings. First and second graders were asked to read a simple 60-word paragraph taken from a grade 1 language textbook and were timed. Only about 25 percent of first graders and 54 percent of second graders were able to read one word or more, and those who could only read at rates of 9 and 29 words a minute on the average, respectively, well below a modest Latin American standard of 30–60 words.

Source: IEG case studies.

student learning outcomes. However, the approaches that they have taken to improve learning outcomes have been quite diverse.

Bank support in Ghana was mainly channeled to the construction and rehabilitation of buildings and the provision of textbooks; these had positive impact on learning outcomes (IEG 2004a). Such basic inputs are still not universal in Ghana—they are often lacking in the most disadvantaged communities, suggesting room for improvement. Still more improvement will be needed, however, if the country is to substantially increase student mastery levels in language and math. Future steps will require changes in what happens inside the classroom—better use of instructional materials, more time on task, and more effective pedagogy.

India's DPEP programs exemplify a Bank support package that covers both basic inputs and systems of teacher support and "pedagogical renewal."[21] Although there has been no evaluation of the impact of these projects on student learning, it is likely that some of the country's positive test results are attributable to better buildings and widespread distribution of much-improved textbooks.

Yet India is starting to reach full provision of such inputs; further increments in learning are likely to rely more on "what children learn and how they learn"(Ayyar and Bashir 2004). In at least one state—Kerala—where pedagogical renewal has been almost revolutionary, research has found that project schools perform better than those in nonproject areas. In most DPEP locations, however, pedagogical renewal has not yet overcome traditional methods and student mastery remains limited.

Evaluation results show that with targeted interventions, learning gaps between social groups can be reduced. Improved learning outcomes in Uruguay had little to do with primary school buildings and learning materials (which have been fully available for many years). The biggest improvements—those for children from low-income families—came as a result of targeted interventions affecting a child's readiness for school (better access to preschool education) and extra instructional time (the provision of "full-time" schools). Evaluation results show that with targeted interventions, learning gaps between social groups can be reduced.

Targeted intervention can reduce learning gaps between social groups.

These three countries reveal a kind of sequencing of learning outcomes support: from the provision of basic inputs to teacher support and pedagogical renewal to targeted interventions for the most disadvantaged.[22] Where the needs at one level are not met, it would be unlikely that efforts at the next would bear fruit. For example, Mali has attempted to undertake pedagogical improvement through a bilingual education program, but such interventions appear to be overwhelmed by the fact that few books and materials are getting to schools (the student:book ratio is between 2 and 12), and buildings are severely overcrowded (pupil: teacher ratio is, on average, 67:1) in part because only about half as many buildings as planned were constructed under Bank-financed projects.

In Uganda, enrollment expansion was dramatic—mostly propelled by the removal of school fees—but was not accompanied by sufficient expansion of physical facilities and books, despite efforts by the Bank to ensure that school quality would not drop. By 2005, the average number of students per classroom was 94, and 3 students were sharing a single textbook. Learning outcomes plummeted (IEG 2004c) but recovered partially in 2003 (World Bank 2005i).[23, 24]

In Peru and Romania, fundamental educational inputs were in place, but learning outcomes were still low or flat. In Romania, Bank support helped upgrade buildings and provide better textbooks, but last-minute agreements removed in-service teacher training from the flagship Educational Reform Project; consequently, little effort was made to improve teacher performance, and little improvement was observed. This was a major impediment to improved learning outcomes.

In Peru, buildings were upgraded, improved materials distributed, and substantial in-service

training provided. Nevertheless, the school system showed no signs of improved teaching and learning, allegedly a result of low incentives: falling teacher salaries (low morale) and almost no supervision or teacher accountability.

In middle-income countries such as Uruguay, there was little to be gained from improving basic inputs or even teachers' general knowledge and skills. Closing the learning gap required an intervention that went to the roots of the learning problems in the target group, which were poor readiness for school and the need for extra instructional time.

Other middle-income countries have shown the value of Bank support in reaching out to pockets of poverty and underachievement and closing performance gaps. In Mexico, a compensatory education program supported by the Bank provided special support to disadvantaged schools serving non-Spanish-speaking families and made inroads into closing their performance gaps (with the mainstream) through a combination of materials development (didactic materials and textbooks in indigenous languages), updated audiovisual technology, professional development of teachers, and grants to parents and community leaders for school improvement programs selected by the group (World Bank 2004b).

In Chile, a Bank-supported primary education improvement project focused on improved learning outcomes (cognitive and affective) among students in marginalized and rural areas. It showed cognitive improvements during 1992–96 that were far greater than the national average. In addition to training teachers and providing free textbooks, the project intensified classroom supervision, offered school improvement grants, created special education programs for those with special needs, expanded preschool education, and screened children for health difficulties.[25] Likewise, Jordan created targeted interventions (with good learning outcomes), based on detailed diagnostic information gained from achievement test instruments (World Bank 2005e).

This chapter began with an assertion that improved access is a necessary prerequisite for learning among the disadvantaged. That does not mean, however, that access should be attended to first and learning outcomes later—once most children are in school. In the best cases presented above, increased access and improved learning were pursued at the same time and were found to be mutually supportive (when children enter and stay in school, their learning usually improves, and where good learning outcomes are observed, children and their parents are more attracted to the school). A better example is Indonesia, where primary school access and learning improvement got seriously out of balance. Before quality retrofitting of its primary schools could be undertaken, increased attention and financing had moved to lower secondary education (World Bank 2003b).

A trade-off between access and learning can be avoided.

At times, however, access can compete with learning outcomes, especially when expansion uses resources intended for quality improvement or when it proceeds too quickly. Is the trade-off between access and learning outcomes inevitable? Box 3.6 outlines conditions under which the trade-off can be avoided.

Box 3.6: Trade-Off between Improved Access and Student Learning Gains: Is It Inevitable?

Educational planners and managers often face hard choices, given the reality of severely constrained budgets and competing interests. Expanding access generally enjoys a kind of political mandate, buttressed by national and international declarations, and having a win-win quality—both providers and consumers enjoy its tangible and timely benefits. Improving learning outcomes is also a popular concept but requires a much more complex chain of events, leading to hard-won, often barely visible and deferred benefits (Grindle 2004). Pursuing the popular expansion agenda can often be done in ways that undermine the learning improvement one (as when classrooms become overcrowded or trained teachers are not provided); effectively pursuing both at the same time is rare.

However, the experience of Ghana and India has shown that the trade-off is not inevitable. Here are some of the factors that support expanding access and improving learning outcomes at the same time:

- Explicit planning for and high political commitment to improved learning outcomes. This requires strong leadership and political skill in building the consensus needed to overcome resistance and inertia.
- Realistic pace of expansion. Big bang approaches to expansion can overwhelm education systems. Ghana and India both have expanded gradually, using targeted incentives to support groups for whom expenses represent serious constraints.
- Adequate provision of essential resources. Expansion with quality requires an increase in marginal costs, largely because of the extra challenge in reaching the formerly unreached (Roberts 2005). Adequate resources include safe buildings, learning materials (in the mother tongue where relevant), trained and motivated teachers, and instructional time (time on task). India increased its spending per elementary student from $25 to $44 from 1993 to 2002 (in 2002 prices); Ghana increased the school day from four hours to five.
- Improvement in education system efficiency. This increases the availability of resources within any given budget envelope. Ghana reduced the number of pre-university schooling years from 17 to 12; India aspired to reduce dropout below 10 percent (still in progress).
- Accountability for results. Both countries have established school committees with the potential for (if not yet full effectiveness in) overseeing use of funds and quality improvement. In Ghana, committees plan improvements based on district achievement data from the previous year, and the frequency of supervised visits to schools has increased. In India, village education committees are expected to monitor teacher attendance; in one state annual student test scores are reported to the state legislature.

Chapter 4: Evaluation Highlights

- Efforts to improve management have not been sufficiently founded in institutional-political analysis.
- Support for local government and school management of primary education has been more effective than support for central government management has been.
- Community management increased parental involvement and improved facilities and staffing, but not quality of instruction.
- Few country programs directly address teacher recruitment and performance incentives.
- Recent projects have given more attention to outcomes evaluation than earlier projects did.
- Systems for monitoring, student assessment, and research have rarely been used in decision making.

4

Better Management for Better Outcomes

Improved sector management has been considered an essential ingredient in a government's attempt to effectively and efficiently turn educational resources into learning gains. In sector strategy papers, improved sector management—governance reform, systemic reform, and decentralization—has been singled out as a priority (World Bank 1990, 1995, 1999).

Virtually all primary education projects reviewed for this evaluation aimed to improve sector management or governance, which includes objectives such as strengthening management systems, decentralizing planning and decision making, increasing community control and accountability, and strengthening monitoring and evaluation (M&E) systems.

Yet performance has been below expectations in this area: only one in four projects with objectives to improve sector management fulfilled them, although 58 percent did so partially. This puts performance almost on par with the worst performing objective in the portfolio (improving internal efficiency, see chapter 3). It is also consistent with the overall IEG institutional development ratings (see chapter 2) for primary education projects, which showed only 25 percent are rated substantial or better on institutional development impact.

Improving Management Performance

Most projects with designs to improve central management, in areas such as planning, policy making, and budgeting for primary education, were able to only partially fulfill those plans (table 4.1). None of the projects fully met its targets for such activities, and nearly half failed to provide enough information to evaluate management performance in these areas, which in itself indicates poor management.

Management objectives often have been overambitious and not sufficiently grounded in institutional-political analysis. For example, in Peru's Primary Education Quality Project, school autonomy and accountability and regional decentralization were not implemented largely because of a lack of consensus and political will. That could have been anticipated with better political analysis during preparation. Moreover, while project planners foresaw a possible change in government (as revealed in appraisal documents), they did not anticipate that 15 ministers of

Management performance objectives have often been overly ambitious and only partially achieved.

Table 4.1: Performance on Education Sector Management Activities for Completed Primary Education Projects (n = 20)

Activities	Number of projects within objective	Performance				
		Fulfilled	Partially fulfilled	Unfulfilled	Undetermined	Total
Central management (planning, policy making, budgeting)	13	0	54	0	46	100
Decentralized management						
By local government	13	31	38	8	23	100
By schools	12	50	25	8	17	100

Source: IEG 2004d.

education would be appointed in 16 years, greatly weakening the ability and willingness to implement strategic planning, policy making, and other system management efforts.

Similarly, the government in Pakistan and the Bank rushed into two large Bank-supported social action projects, each allocating more than $100 million to basic education, without a clear understanding of their complex management—especially financial management—requirements. A good capacity and political assessment might have revealed not only low technical skills at the provincial and district levels but also a culture of patronage, which frequently led to the misallocation of funds.

Weak incentive systems constrain management performance.

Ineffective management performance can often be traced to weak incentive systems. In Mali, the reward systems of donors have created an environment in which central government managers only undertake tasks when the per diem is considered high enough. Routine tasks not covered by such incentives are often left undone or are done by consultants, further undermining management capacity building.

The case study for Pakistan cites weak management incentives as a major obstacle to improving educational quality. In Peru, the government has been unable to create accountability at the school level: guidelines and learning materials have been widely distributed, but there is no means of ensuring or even determining compliance or use.

Management improvement is more often evaluated on inputs and outputs than on outcomes.

Finally, the frequent use of project implementation units in Bank-supported projects, such as those in Mali, Niger, and Peru until 2001, has created animosity between relatively well-paid unit staff and government education officials and little, if any, transfer of skills.

Management improvement efforts are more often evaluated on inputs and outputs than on outcomes. Only about half (47 percent) of the randomly selected projects having management improvement objectives evaluated were with respect to management *outcomes* (improved planning and reporting, better budget oversight, and so forth). Most tracked only *inputs* and *outputs*, like the provision of office equipment and staff training.

The failure to monitor and evaluate management outcomes weakens the incentive for improved performance. A recent IEG evaluation of capacity building in Africa found that "projects almost always achieved their target numbers of individuals to be trained, but on the critical question of whether new skills were acquired and translated into organizational performance, the record seems weak" (IEG 2005a, p. 32).

Management capacity building in operations drawing on World Bank financing has been fragmented and largely ineffective (Busto, Smith, and Skoelv 2006; IEG 2005a, d, e). Fragmentation comes largely from

the lack of a coherent strategy and an overemphasis on individual technical skills. It also results from the uncoordinated and confusing mix of capacity-building efforts across the various development agencies. Making capacity building into a core activity of donor support within a sectorwide framework is seen as a clear path for bringing more coherence and clout to the undertaking (box 4.1).

Decentralization

Decentralization of educational management is supported by an increasing share of Bank primary education projects, but the effects of this on educational access and quality, especially for the disadvantaged, have not been established. Consistent with its 1999 sector strategy, Bank support for decentralized management has increased.[1] About 80 percent of ongoing projects in the portfolio finance decentralization to local government, compared with 60 percent of completed projects. An even higher share of ongoing projects—90 percent—finances school-level management, compared with 60 percent of completed projects.

The Bank supported decentralization efforts in most field-based study countries, often with good results (Honduras and India), but in some cases (Romania and Pakistan) there was ambiguity in what the different levels covered, nonalignment of administrative and financial features of decentralization, and undertraining of local government staff for their new tasks.

Management capacity building in Africa has been fragmented and largely ineffective.

Decentralization can have adverse effects on education system equity. With respect to decentralization and educational outcomes, the IEG impact study in Ghana revealed how decentralization in that country (involving a greater share of financing by districts and communities) has led to disparities in resource availability between poor and nonpoor areas. Similarly, case study managers for Peru perceived vast inequalities in district capacity to effectively manage education under the country's proposed new decentralization laws.

The effects of decentralization on education management have not been established.

In contrast, Uruguay, perhaps Latin America's most centralized country, has been very successful in improving equity of outcomes in its education system through targeted interventions to poor communities. Examples like this call for a more nuanced and more evidence-based education sector position on decentralization, especially with respect to the disadvantaged.

Bank support for local government and school management of primary education was more effective than for central government manage-

Decentralization can have adverse effects.

Box 4.1: Toward More Coherent Capacity Building in Africa

The IEG evaluation of capacity building in Africa identified four key elements to ensure coherence of management capacity building interventions, as follows:

- Capacity needs assessments conducted with stakeholder participation
- A management structure that aligns the public sector improvements being sought with country development goals, sets outcomes objectives, and coordinates efforts across program components and related public sector reforms
- An implementation process that arranges in the right sequence measures to strengthen relevant institutional, organizational, and human resource capacity
- M&E processes that assess progress and suggest necessary course corrections.

Source: IEG 2005a, p. 33.

Support for local and community management of primary education has been more effective than support for central management.

ment, but leaves room for improvement. Planned activities for strengthening local government management of primary education were fulfilled in about a third of completed projects; for school-level management activities that number was about one-half (table 4.1). The field-based studies also showed mixed results for decentralization.

In India, the large network of the DPEPs put school improvement planning and implementation in the hands of village committees and district officials. Many communities and districts seized this opportunity to mobilize the energy and creativity of their members for improved access and learning outcomes. However, because DPEP was in a minority of the districts in most of the states where it was implemented and because it is managed through a special network outside the bureaucracy, there is some doubt as to whether the innovations will take root in the mainstream (Ayyar and Bashir 2004).

In both Pakistan and Romania, the Bank supported a policy of decentralization, underpinned by analytical work, but the countries scaled up the reforms before their models were fully developed. Consequently, there is much ambiguity over what level of government is responsible for different functions and how functions transferred to local governments will be financed.[2] Partly because of such ambiguities, technical training of local government officials in need of management skills was not effective (Pakistan) or even covered (Romania).

Community Control and Accountability

Community management has brought improvements, though not for quality of instruction.

Empowering communities to manage educational funds has increased parental involvement in schools and brought improvements in facilities and staffing. The ultimate form of decentralization, which is designed to put accountability into the hands of the clients of education, is to empower communities to manage their own schools (see World Bank 2004h).[3] Increased community control was a feature of Bank support in several field-study countries: Honduras, India, Mali, Pakistan, Romania, and the Republic of Yemen. Honduras' Community Education Program (PROHECO), piloted in a completed project and brought to scale in the ongoing Community-Based Education Project, fully exemplifies this approach in that it empowers community education associations to open schools, hire and pay teachers, support school improvements (for example, through parent and teacher training programs), and maintain school buildings.

Other countries, with Bank support, have also created school committees that have exercised many of these functions. Evaluations have revealed that school committees do get set up and often effectively manage school construction, rehabilitation, maintenance, and the hiring of teachers (World Bank 2003g; IEG 2004a; Durston 1999). An evaluation of El Salvador's Bank-supported Community Managed School Program (EDUCO), in which schools are managed autonomously by community education associations, found that student absences were lower in community-managed schools compared with traditional public schools, after controlling for student, school, and participation characteristics (Jimenez and Sawada 1999).[4]

The evidence to date about the effectiveness of community management in improving the quality of instruction and student learning outcomes is thin (Roberts-Schweitzer, Markov, and Tretyakov 2002). Student test scores have improved under PROHECO in Honduras, but this was more a reflection of improved teacher attendance, smaller classes, and fewer school closings than of improved instruction—for example, use of multigrade teaching (Vegas 2005). In the case of EDUCO, learning achievement on standardized tests of children in community-managed schools was no different from those of children in traditional public schools, when child, school, and participation characteristics were controlled for (Jimenez and Sawada 1999).[5]

In Ghana and India, school committees are primarily engaged in annual planning meetings and infrastructural improvements (IEG 2004a; World Bank 2003g). Because so many countries have bought into this model of community empowerment, it is important that it be fully and carefully evaluated with respect to its impact on learning.

Strengthening traditional accountability mechanisms operating through head teachers and school supervisors has also been a focus of Bank support and has been associated with improved learning outcomes. In Ghana the IEG impact study showed instructional leadership by head teachers and supervisors to affect improved teaching methods. That in turn affected learning gains. Support to Ghana from other development partners helped to increase supervision visits from about five to between six and nine times a year over the 1988–2003 period. Nevertheless, support was uneven, given that only about 44 percent of teachers reported direct contact with a supervisor in 2003 (IEG 2004a).

In Uruguay and Chile, support for intensified supervision (at least one visit per month) has been associated with relatively high achievement gains in project schools. In Chile, supervision was reoriented from a focus on inspection to pedagogical improvement. Principals were also retrained in developing school-based improvement projects that engaged teachers in efforts to improve teaching and learning (World Bank 2001a).

In Peru, where learning outcomes are below expectations, feedback and accountability mechanisms are weak or nonexistent. In India, enrollment growth has outpaced the expansion of supervision systems, which, since they were integrated with the DPEP, have fallen into relative neglect in some locations.[6]

Teacher Incentives

Few Bank-supported country programs have directly addressed teacher selection and performance incentives, and where they have, there were sometimes perverse consequences or unsustainable results. The Bank supported teacher selection and performance incentives in two of four case study countries. In Mali, the Bank's policy dialogue advocated an increase in standards for primary school teacher candidates (secondary school completion) and the use of contract teachers. However, these measures reduced the availability and use of trained teachers, because few high school graduates were interested in teaching primary school.

Operating through traditional accountability structures has been associated with improved learning outcomes.

In Peru, Bank-funded analytic work put heavy emphasis on meritocratic methods for hiring and rewarding teachers. The government adopted teacher tests to select new teachers and to reconfirm the appointments of acting ones, but the system was only used once and has not become routine. Also, it has successfully piloted the use of locally applied incentives to encourage improved teacher attendance. A clear gap is the fact that none of the meritocratic methods included any rewards for improving student learning outcomes.[7]

A number of strategies have been implemented to attract teachers to rural and underserved areas, with varying degrees of success. In most countries, serious teacher shortages in marginalized areas have undermined efforts at improving learning among the disadvantaged. For example, Uganda has an average pupil:teacher ratio of 55:1, but in one relatively poor district it is 90:1. In Ghana, the proportion of schools with pupil:teacher ratios above 50:1 was far above the national average in the disadvantaged northern region (54 percent).

Few country programs directly address teacher selection and performance incentives.

To attract teachers to hardship areas, the Bank has supported the construction of teacher houses, cash incentives for teaching in rural areas, and local recruitment of teachers,

especially females. In Uganda, teacher housing was added to a Bank-financed project to attract and retain teachers in rural schools, raising teacher morale (IEG 2004c). Financial incentives were offered to attract teachers to rural areas in a successful pilot project in Peru. In the Republic of Yemen, teachers rejected housing in favor of a financial incentive for rural school service that they could use to cover expenses wherever they chose to live.

However, new professional requirements for teachers will make it harder to attract teachers to rural areas. Now teacher candidates must be secondary school graduates, preferably female, with tertiary-level teacher training. Because few rural women can meet these standards, most new teachers are urban women for whom a modest rural service bonus will be insufficient to induce them to move or even commute to a poor rural village.

For such reasons, countries like Honduras have supported community management of schools and hiring of local (but often less-qualified) teachers. The program has enlisted teachers for remote schools, but those teachers have expressed apprehensions about job security and access to retirement and professional development benefits (World Bank 2001b). Such threats to keeping teachers in difficult assignments have not been effectively addressed in many locations.[8]

Monitoring, Evaluation, and Research

The evaluation designs of many Bank-supported education projects have not been outcome or results oriented.[9] A recent assessment by the Bank's Quality Assurance Group (QAG) found that only 68 percent of all education projects designed in fiscal 1999–2002 had satisfactory designs for outcome or impact evaluations, despite the fact that overall "quality at entry" ratings were satisfactory for more than 85 percent of them.[10]

Evaluations have typically not focused on outcomes or results, although this is changing.

The QAG assessment attributed continuing weaknesses in M&E to: (i) the failure to establish an M&E system during project preparation; (ii) the absence of M&E specialists on the Bank's project appraisal teams; (iii) the selection of inappropriate indicators to evaluate impact and measure outcomes; and (iv) a general failure to convince the borrower of the usefulness of these systems as a management tool, and of their significance for governance and the development of a learning culture.

Primary education projects, especially those initiated during the late 1980s to mid-1990s, were even less focused on outcomes and impact evaluation; more recent projects have been giving results more attention. Among the 20 completed Education Sector investment projects examined in depth for this study, only 44 percent had plans to evaluate improved quality of schooling using outcome measures, whereas nearly all (94 percent) planned to monitor outputs (IEG 2004d, table 8).

Only one in 10 proposed to compare findings with a control or comparison group, or had some provision for assessing the counterfactual. Comparable figures for outcome/impact evaluation of *sector management* objectives were 26 and 11 percent.[11] More recent projects are better on both counts: 80 percent of active projects have plans to measure quality improvement features through outcome indicators and about 30 percent are designed to do impact evaluation; the comparable figures for improved sector management are 80 and 20 percent.[12] While the design features of the new projects do point to more borrower acceptance of results evaluation as a management tool, optimism should be tempered by the fact that, in the past, only two-thirds of projects with planned outcome evaluations carried them out (IEG 2004c, box 4).[13]

The Bank has supported capacity building in M&E in most countries with primary education projects, many including the development of national learning assessments. In India, Pakistan, and Uganda, it supported the establishment of Educational Management Information Systems (EMIS). In

Pakistan, Peru, Romania, and Vietnam, it supported systems of assessing student learning. In India it supported the conduct of educational research.

Assessment systems are up and running in Peru and Romania and are considered among the most enduring and effective features of Bank-assisted projects. The large increase in research output in India suggests that a "culture of research" is taking root, spurred by the DPEPs.

Where functioning M&E systems have been established, however, rarely have results been used in decision making. The usefulness of M&E products has been undermined by poor quality and lack of attention by policy makers. In the countries where EMIS have been developed there are widespread and lingering problems with data quality: in Uganda school data frequently cannot be verified; in Pakistan there are discrepancies in simple enrollment data between EMIS and household surveys. Neither Romania nor Peru has effectively used student test results for planning purposes and in policy making.

Bank-supported M&E systems have rarely been used in decision making.

In Romania, capacity was not built with regard to systems for using data from any source in policy analysis or strategic planning, and little Bank support had been provided for cross-sectoral analysis and planning. In Peru, the failure of the Quality Measurement Unit to influence educational decision making resulted in part from lack of staff training. In India, the blossoming research productivity has often been irrelevant to policy and system improvement, research topics having been chosen in an unsystematic manner without policy development goals in mind (World Bank 2003g).

In a more positive vein, Vietnam's first (and, to date, only) national reading and mathematics assessment, financially and technically supported by the Bank, led to a significant shift in the ministry's focus toward learning outcomes. The results stimulated a public debate on the quality of schooling and prompted new government initiatives to improve learning outcomes among ethnic minorities and the poor.

5

Conclusions and Recommendations

Conclusions

There has been an extraordinary mobilization of lending and non-lending resources in support of the Bank's primary education policies over the past 15 years. Lending for primary education has become increasingly progressive with respect to the poorest countries and has often been directed toward the most disadvantaged within countries.

In most parts of the world, these investments have significantly improved access to primary education through the construction of new schools and the reduction of other physical, financial, and social barriers. Beyond achieving universal completion of primary education, which is one of the MDGs, the remaining EFA challenge is to ensure that all children, particularly the disadvantaged, acquire the basic knowledge and skills that are crucial for poverty reduction.

While the Bank has effectively helped countries improve enrollments even among underserved groups, it has been less effective in helping them reduce school dropout rates and increase learning outcomes, especially among the disadvantaged.

- Few Bank programs, although they are increasing in number, have been designed explicitly to improve student learning outcomes for the disadvantaged (even among those focusing on improving the quality of schooling).
- In the few places where knowledge and skills acquisition have been measured over time, positive changes have been observed. However, often absolute or mastery levels in basic subjects are still low, particularly among the disadvantaged.
- Failure to provide reading skills in the early primary school years—among the disadvantaged and advantaged alike—is often at the root of weak learning outcomes.
- Raising primary school completion rates—the main MDG and FTI objective—is an important part of the story. However, where this agenda has been promoted at the expense of good learning opportunities, large numbers of children, especially those from disadvantaged backgrounds, have been completing school without having gained the knowledge and skills they need.
- A trade-off between improved access and student learning gains can be avoided, but only with careful strategizing. This should begin with explicit planning for and strong political commitment to improved learning outcomes.

The optimal strategy to improve learning outcomes for the disadvantaged in any given country will depend on local conditions and institutions. Those countries where Bank support has led to improved learning for the disadvantaged have taken quite different routes, consistent with their conditions and constraints. What has had the largest impact in Ghana may not have the same impact in Uganda; what is effective in Honduras may not be so in Peru.

The Bank has acknowledged the importance of countries' creating their own solutions, based on their unique mix of problems, financial, cultural and political resources, and constraints. Some of the lessons learned in this evaluation related to this approach are as follows:

- Many countries still do not generate the kind of information they need to design solutions to low learning outcomes among the disadvantaged. They need data on participation rates, delivery of services and quality inputs, and learning outcomes by gender and by socioeconomic status that can be tracked over time. Of the relatively few countries that aim to improve learning outcomes, many begin without any baseline data.
- Where the distribution of learning outcomes across gender and family income levels has been measured, specific interventions for the disadvantaged can be designed. Unfortunately, many countries have not used student learning data—even when available—in a diagnostic manner or for program planning and improvement.
- Economic and sector analysis often is out of date or not sufficiently comprehensive to understand the factors behind low participation, persistence, and learning among the disadvantaged. These reasons will change the closer a country comes to universal enrollment: the reasons for nonenrollment and/or low learning outcomes among the last 20 percent will be very different from those for the other four quintiles. Bank-supported projects and programs have often been unengaged or unsuccessful in building local capacity for the conduct of such sector assessments.
- The Bank's Country Assistance Strategies have not consistently included educational outcomes (including learning outcomes) in their performance indicators. The 2005 *Education Sector Strategy Update* has called for this to be institutionalized in all regions.
- Sector management capacity, a common weak point in Bank-supported primary education projects, might have been better dealt with had there been better-organizational capacity assessments at the outset (some countries were clearly overstretched by their Bank-supported project agendas) and better capacity-building programs. In addition, many country programs supported by the Bank failed to pre-assess the strength of political forces acting both in support of and against the change agenda. Instead, there was a widespread presumption that decisions are made on the basis of rational planning and technical merits. Politically motivated threats to project implementation and success were rarely even mentioned in risk assessments of the many projects reviewed here; thus, no mitigation strategies were formulated.
- There has not been adequate experimentation with local solutions through the evaluation of pilot projects, with respect to their impact on learning outcomes. Adopting international good practice norms without sufficient experimentation can lead to unanticipated results that can undermine program effectiveness.

Relatively ineffective government efforts to improve sector management and governance have been a weak link in the results chain from Bank support to learning outcomes.

- Many primary education projects had objectives to improve sector management, but few of them fulfilled their objectives. The most serious lapses were on improvements at the central level, but results at the local government level were also quite weak. Most projects examined evaluated their results using input or output criteria (number of staff members trained) as opposed to outcomes (changes in management behavior). This echoes the IEG evaluation of capacity building in Africa.

- The Bank supported decentralization efforts in most of 12 IEG field study countries, often with good results (Honduras and India). Many cases, however, saw several points for improvement: ambiguity in what the different levels covered, nonalignment of administrative and financial features of decentralization, and undertraining of local government staff for their new tasks. Also, there are serious questions about the effects of decentralization on the educational opportunities and outcomes for the disadvantaged.
- In most of the field study countries, weak management incentives at all levels were constraints, especially to the improvement of educational quality. There were more rewards for increasing the number of schools than for redistributing teachers, implementing a new curriculum, doing effective M&E, or even improving test score results.
- Few Bank-supported country programs directly addressed teacher recruitment and performance incentives. Performance incentives related to student learning outcomes are particularly lacking. Among the many strategies to attract teachers to disadvantaged areas, the hiring of locals shows the most promise, as long as those teachers have access to professional growth opportunities and job security.

Increasingly, Bank support for primary education is coming through components in projects originating in other sectors. This phenomenon has boosted the resources available to primary education and exemplifies a growing Bank preference for cross-sectoral (or comprehensive) development approaches. Moreover, in social funds and community-driven development, support for primary education is driven by community demand. However, as so many of these efforts are recent, few have been evaluated, so their effects on educational outcomes are still not well understood. Some preliminary findings suggest the need for caution.

- The portfolio review of 10 projects managed outside the Education Sector showed those projects to have fewer objectives than sector-based projects, mostly covering equity improvement or enrollment increases (learning outcomes and sector management were not present). Their project activities were predominantly school construction and rehabilitation. It was not clear the extent to which governments were committed to covering the qualitative inputs and recurrent costs (teachers, books) for this expansion in infrastructure. In the Republic of Yemen major Bank support for infrastructure coming through public works and social funds projects was accompanied by the adequate provision of trained teachers and textbooks. In other countries, however, there was often weak interaction between the non-Education Sector programs and Education Sector programs and recurrent resources.
- The direct involvement or influence of the Education Sector on these education components does not appear to be strong (see chapter 3). The *Education Sector Strategy Update* of 2005 shows a determination to increase the focus on learning outcomes, but it is not clear how well this shift in priorities will be communicated to supporters of education in the other sectors.
- The strong presence of basic education in growing numbers of PRSCs is a good sign that basic education is viewed as a poverty-reduction instrument, but an examination of recent PRSCs shows few that are focused on the main education driver of poverty reduction, namely, knowledge and skills acquisition. Equally few mention low learning outcomes as a contributor to poverty. A careful evaluation of this new instrument is needed to determine the extent to which the basic education features of such credits are based on a good analysis of what is needed to improve educational impact and whether such features help set the stage for better learning outcomes. Also needing assessment are the adequacy of supervision of quality improvement features of the PRSC and whether educational outcomes are specifically and effectively evaluated.

The Bank's 1990 primary education paper called for adequate funding for "good-

quality primary education to become widely and equitably available." Although Bank and country funding for primary education has increased sharply since then, the question still remains whether it has been adequate and sustainable.

- Reaching the previously underserved will require marginal increases in unit costs; also reaching beyond school attendance to improve learning outcomes will mean increased costs.
- So far, estimates of funding gaps for universal primary education (see Bruns, Mingat, and Rakotamalala 2003) are based on steps needed to ensure universal completion. A more appropriate approach, given the learning outcomes "imperative" [UNESCO's term], would factor in the costs of providing acceptable learning levels for all. This will clearly result in increased funding gap estimates, but the message is a timely one, given renewed interest in EFA by G-8 countries (G-8 Group 2006).
- The Bank's 2005 *Education Sector Strategy Update* signals an intention to maintain momentum for EFA, including a greater focus on learning outcomes, while at the same time broadening its mandate to support "education for knowledge economies," without any net additions to total Bank education sector staffing. It is difficult to understand how this more demanding EFA agenda can be pursued with diminished staff resources.

Recommendations

- **Primary education efforts need to focus on improving learning outcomes, particularly among the poor and other disadvantaged children.** The MDG push for universal primary completion, while a valuable intermediate goal, will not ensure that children achieve the basic literacy and numeracy that are essential to poverty reduction. This means that:
  - Improving learning outcomes needs to be a core objective of all support for primary education, with a particular focus on achieving equity in learning outcomes by gender and among the poor or otherwise disadvantaged.
  - The Bank's primary education assistance—whether sponsored by the education sector or other sectors—needs to focus on the factors most likely to affect learning outcomes in a given country's context. This will require more analysis of student learning and its local constraints and facilitators.
  - The Bank and governments need to recognize that reaching children not yet enrolled and improving low achievement levels will raise the unit costs of primary education.
- **Efforts are urgently needed to improve the performance of sector management in support of learning outcomes.** This implies that:
  - Programs to improve sector management and governance need to be based on sound political and institutional analyses that take into account the incentives officials and teachers face to improve the quality of instruction and learning outcomes. Accountability and supervision systems need to be adapted to support improved learning outcomes.
  - Primary education managers need to: (a) track learning outcomes over time—not just the average, but among different income and social groups; (b) monitor individual staff and system performance indicators, for both centralized and decentralized activities; and (c) create and use incentives to encourage staff to improve and use their technical skills. All new Country Assistance Strategies should include learning outcomes indicators.
  - Analytic, assessment, and research activities need to be oriented to informing key management and policy issues, with incentives to ensure that the findings are used in decision making. One such research priority would be to assess the impact of decentralized management on inequalities across income and social groups and to identify mitigation measures of any adverse effects.
- **The Bank needs to work with its development partners to reorient the Fast-Track Initiative to support improved**

learning outcomes, in parallel with the MDG's emphasis on primary completion. This will require that the Bank and its partners do the following:

- Reframe the goals and objectives of the FTI to include improved learning outcomes for all, in addition to school completion for all.
- Require learning achievement indicators and targets in country FTI proposals and add items to the indicative framework that are directly related to learning outcomes, such as instructional time, teacher attendance, or availability of textbooks.
- Help countries, financially and technically, to set up suitable systems for conducting repeated learning assessments that are capable of tracking outcomes separately for disadvantaged groups, including the poor.
- Revise cost and funding gap estimates to (a) reflect the costs of achieving basic learning outcomes (not simply primary completion) and (b) take into account the increased unit costs of expanding access to and improving learning outcomes among children from disadvantaged backgrounds.

APPENDIXES

APPENDIX A: WORLD BANK POLICY OBJECTIVES AND STRATEGIES FOR PRIMARY EDUCATION

Document	Policy objectives	Sector strategies	Priority recipients
Education: Sector Strategy Paper (1980)	Provide basic education to all youth and adults (irrespective of sex, ethnicity, and socioeconomic status). Relate education to work and environment.	Maximize internal efficiencies in education. Improve institutional capacity.	
Primary Education: A World Bank Policy Paper (1990)	Expand primary school completion. Expand girls' access to education. Improve children's learning.	Organize Bank funding support for long-term institutional development. Support countries in: • Efficiently allocating additional resources • Enacting aggressive measures for girls' enrollment (nearby schools, toilet facilities, female teachers, cash incentives, and so forth) • Regularly collecting/reporting student achievement data • Reforming initial/in-service teacher training and support • Strengthening educational management • Strengthening preschool education • Integrating nutrition and health into primary/preschool programs.	Countries having reform agendas
Priorities and Strategies for Education (1995)	Improve educational outcomes. Increase equity for poor, females, other disadvantaged.	Allocate greater share of lending to basic education. Encourage education reform, based on economic analysis. Encourage household involvement in education. Promote school autonomy. Increase both supply of and demand for basic education. Encourage free basic education; some cost recovery for other levels.	The poor and underserved within countries
Education Sector Strategy (1999)	Support EFA goals, especially for girls. Improve quality of teaching and learning.	Support countries in: • Increasing early interventions (early child development and school health) • Increasing innovative delivery (distance education, open learning, information technology) • Strengthening systemic reform (standards, curriculum, and assessment of governance/decentralization) • Apply Bank operating principles (focus on client, comprehensive analysis and selective action, focus on development impact, good use of knowledge, productive partnerships).	The poorest countries with lowest enrollment rates
Education Sector Strategy Update (2005)	Maintain momentum on EFA and MDGs. Strengthen education for the knowledge economy.	Support countries through: • Collaborations with other donors, including through the Fast-Track Initiative • Increased focus on results • Systemwide approaches, including analysis of education sector as well as macroeconomic context.	Low-income countries with PRSPs and education plans

Note: EFA = Education for All; MDGs = Millennium Development Goals; PRSPs = Poverty Reduction Strategy Papers.

APPENDIX B: STUDY METHODS

Conceptual Framework

The framework depicts the main explicit channels (that is, mentioned in project documents) through which Bank assistance (analytic work, policy dialogue, and lending) can influence educational outcomes—for example, through government policy and institutional capacity, specific features of the educational system (facilities, books, teacher status and quality, teaching-learning processes, and education system management), increased demand for education, and educational outputs (school completion), plus other enabling or moderating factors such as improved donor cooperation, civil service reform, support for complementary sectors and subsectors, labor force (employment) services, and actions in the private sector and by civil society.

The framework specifies educational outcomes to be both learning outcomes (basic knowledge and skills acquisition) and employment/welfare outcomes; however, given the scarcity of data, there was little coverage of the latter. This framework presents a "results chain" through which Bank support is assumed to operate. As there are other factors influence educational outcomes (for example, family status and home environment), this cannot be considered a fully elaborated model.

Evaluation Methods

Literature Reviews

As orientation and background material, the study undertook reviews of literature, both thematic (covering relevant topics) and archival (relevant documents).

Thematic reviews covered the following topics:

- Rationale for public investment in primary education in developing countries (see Boissiere 2004b)
- Determinants of learning outcomes in developing countries, including both supply- and demand-side factors (see Boissiere 2004a)
- External assistance to primary education in developing countries.

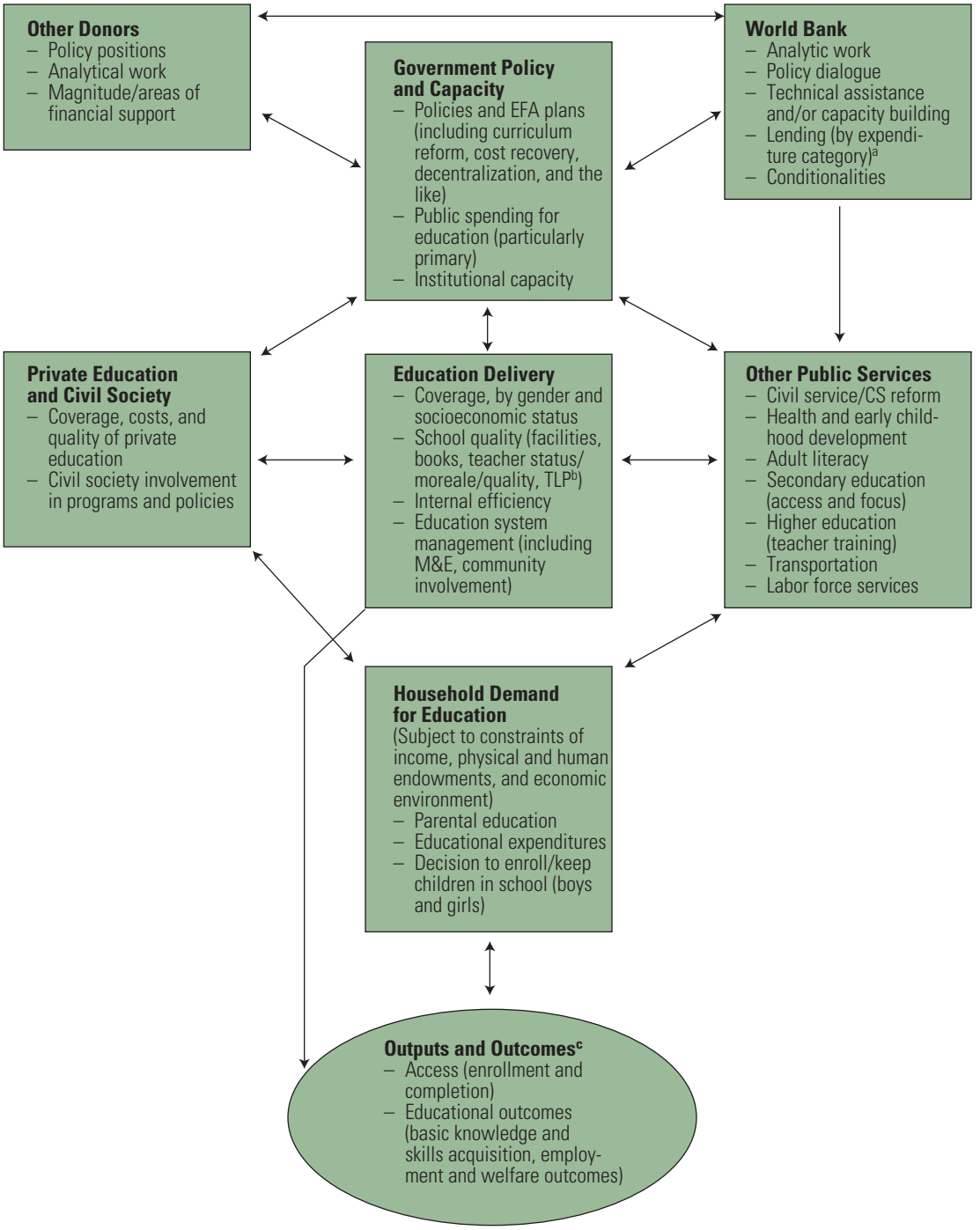
Archival reviews included the following:

- Education Sector documents (sector policy and strategy documents, Project Appraisal and Completion Reports, education sector retrospectives [annual reports], research and policy dialogue reports)
- Independent Evaluation Group (IEG) evaluation reports on other education subsectors (adult literacy; secondary education); social funds; health, nutrition, and population; HIV/AIDS; community-driven/ community-based development; capacity building in Africa, and Annual Reviews of Development Effectiveness (2002–04).

Portfolio Review

Trends in Bank financial support (International Development Association [IDA] and International Bank for Reconstruction and Development [IBRD] lending) for primary education were examined though a desk review of lending documents and reports. The portfolio review included an analysis of the full portfolio of projects with any funding for primary education approved between fiscal 1963 and fiscal 2004, as well as an in-depth study using a sample of

Figure B.1: Channels of Bank Influence on Primary Education Outcomes



a. Including past, present, pipeline, and dropped.

b. Teaching Learning Processes, including "time on task" and language of instruction.

c. By gender and socioeconomic status.

projects from the full portfolio (called the "portfolio sample").

For Education Sector projects, data were taken from one internal database. For projects managed by other sectors, data were obtained from a different database. All projects approved from fiscal 1963 to fiscal 2004 having any allocation to primary education were included.[1] For the in-depth study, a stratified random sample of 50 primary education projects was taken from the full portfolio of education projects. The sample was stratified by managing sector, loan type, and portfolio status (active or closed) to represent the composition of the full portfolio.

The full portfolio review used existing data on education projects to analyze the following:

- Magnitude and focus of IDA and IBRD lending for primary education, especially since 1990, in nominal and real terms, through both investment and adjustment instruments and managed by different sectors (education and other)
- Regional distribution of lending coverage of low-income countries
- Evolution of lending project objectives, including how well they addressed Education Sector policy objectives
- General IEG performance ratings of primary education projects.

The in-depth study reviewed all available project documents for 50 projects to examine in more detail:

- Development objectives
- Project activities
- Monitoring arrangements
- Effectiveness of completed primary education projects, including both IEG ratings and the evaluation team's assessment of how well projects performed on their objectives.[2]

Field-Based Studies

The primary education evaluation drew on field-based studies in 12 countries, either enhanced performance assessments (PPARs) of recent primary education projects in a country context or case, an impact study (Ghana), or case studies undertaken for this evaluation. The evaluation sought to include examples from each of the four categories in the matrix of educational performance vis-à-vis income level (see table B.1, below).

Country Case Studies

Four country case studies were undertaken specifically as part of the primary education evaluation, focusing on the development effectiveness of the Bank's assistance to primary education at the country level, where Bank support to primary

Table B.1: Selection of Countries for Country-Level Analysis

	Learning outcomes improvement	
Income level	**Poor**	**Good**
Low income	**Mali**	**Ghana**
	Pakistan	*India*
	Uganda	*Vietnam*[a]
	Niger	
	Yemen, Republic of	
Middle or lower-middle income	**Peru**	**Romania**[b]
	Honduras	*Uruguay*

Note: Countries in *italics* are subjects of enhanced PPARs on one or more primary education project; those in **bold** are case study or impact study countries.

a. Vietnam has yet to report change scores on its standardized testing of fifth graders, but overall 2001 achievement levels in math and reading were considered to be quite high, especially in math (World Bank 2004g).

b. Romania was originally assessed to have positive learning outcomes based on the high (and recently increased) pass rate on its eighth-grade examinations; however, subsequent analysis of international assessment results have revealed a flat (non-increasing) pattern of learning outcomes.

education has been significant and longstanding. The case study countries—Mali, Pakistan, Peru, and Romania—were purposively selected to represent a variety of regions, income levels, and educational performance levels.

The case study methodology included interviews with Bank and local managers, beneficiaries, donors and international agencies, and other stakeholders. In addition, case studies collected official data on schools and learning outcomes, as well as primary data in a small sample of schools in each country. Case studies reviewed the effectiveness of Bank-sponsored policy dialogue, analytic work, and lending, in the context of each country's changing political economy.

Impact Evaluation

IEG completed an impact evaluation of World Bank support to basic education in Ghana during the primary education evaluation. The Ghana evaluation was based on a longitudinal study of achievement data from a household survey (1988 and 2001) and school surveys for both years in 85 districts.

Project Performance Assessment Reports

IEG assesses one in four completed projects (or about 70 a year) through Project Performance Assessment Reports (PPARs). Projects are selected for evaluation through PPARs based on several criteria, including good potential for learning (because of particularly good or bad performance) and relevance to upcoming IEG sector or thematic evaluations. PPARs, which normally include a field mission, rate projects in terms of their outcome (taking into account relevance, efficacy, and efficiency), sustainability of results, and institutional development impact. PPARs are similar to the completion evaluations carried out by many development agencies and are the main project-level evaluations conducted by IEG. They are products in themselves but may also be intermediate inputs for other evaluations, such as this primary education evaluation.

In this case, primary education projects in seven countries were to be evaluated by PPARs during the period that this primary education evaluation was under way: Honduras, India, Niger, the Republic of Yemen, Uganda, Uruguay, and Vietnam. For these, task managers were asked to address specific questions laid out in the Terms of Reference for the primary education evaluation.

APPENDIX C: PROJECTS IN THE PORTFOLIO REVIEW SAMPLE

Country	Fiscal year	Project ID	Project name
Education Sector investment projects having at least 50% primary: Closed since 1995 (n = 20)			
Bangladesh	1990	P009514	General Education Project
Bosnia and Herzegovina	1998	P045313	Second Education Reconstruction Project
Cape Verde	1988	P000424	Primary Education Upgrading Project
Chad	1993	P000517	Basic Education Project
Chile	1992	P006668	Primary Education Improvement Project
China	1995	P003636	Basic Education in Poor and Minority Areas Project
China	1996	P036950	Third Basic Education Project
Guinea	1995	P001087	Equity and School Improvement Project
Guinea-Bissau	1988	P000988	Basic Education Development Project
India	1996	P035821	District Primary Education Project
Lesotho	1992	P001392	Education Sector Development
Macedonia, FYR	1998	P038391	Education Rehabilitation Project
Mexico	1994	P007725	Second Primary Education Project
Morocco	1989	P005480	Rural Primary Education Project
Nepal	1989	P010335	Earthquake Emergency Schools Rehabilitation Project
Pakistan	1987	P010280	Third Primary Education Project
Pakistan	1990	P010346	Sindh Primary Education Development Program Project
Tanzania	1990	P002790	Education Planning and Rehabilitation Project
Trinidad and Tobago	1996	P035312	Basic Education Project
Uruguay	1994	P008171	Basic Education Quality Improvement Project
Education Sector investment projects having at least 50% primary: Active as of March 2004 (n = 10)			
Albania	2000	P069120	Education Reform Project
Bangladesh	2004	P074966	Primary Education Development Program II
Bolivia	1998	P006204	Education Quality
Djibouti	2001	P044585	School Access And Improvement Program
India	1998	P038021	DPEP III (BIHAR)
India	2000	P050667	UP Third District Primary Education
Indonesia	1999	P040196	Sumatra Basic Education
Kenya	2003	P082378	Free Primary Education Support Project
Lesotho	2004	P081269	ESDP II (PHASE 2)
Education Sector investment projects having at least 50 percent primary: Closed since 1995 (n = 20)			
Bangladesh	1990	P009514	General Education Project
Bosnia and Herzegovina	1998	P045313	Second Education Reconstruction Project

(*Continued on the following page.*)

Appendix C: Projects in the Portfolio Review Sample (continued)

Country	Fiscal year	Project ID	Project name
Cape Verde	1988	P000424	Primary Education Upgrading Project
Chad	1993	P000517	Basic Education Project
Chile	1992	P006668	Primary Education Improvement Project
China	1995	P003636	Basic Education in Poor and Minority Areas Project
China	1996	P036950	Third Basic Education Project
Guinea	1995	P001087	Equity and School Improvement Project
Guinea-Bissau	1988	P000988	Basic Education Development Project
India	1996	P035821	District Primary Education Project
Lesotho	1992	P001392	Education Sector Development
Macedonia, FYR	1998	P038391	Education Rehabilitation Project
Mexico	1994	P007725	Second Primary Education Project
Morocco	1989	P005480	Rural Primary Education Project
Nepal	1989	P010335	Earthquake Emergency Schools Rehabilitation Project
Pakistan	1987	P010280	Third Primary Education Project
Pakistan	1990	P010346	Sindh Primary Education Development Program Project
Tanzania	1990	P002790	Education Planning and Rehabilitation Project
Trinidad and Tobago	1996	P035312	Basic Education Project
Uruguay	1994	P008171	Basic Education Quality Improvement Project
Education Sector investment projects having at least 50 percent primary: Active as of March 2004 (n = 10)			
Albania	2000	P069120	Education Reform Project
Bangladesh	2004	P074966	Primary Education Development Program II
Bolivia	1998	P006204	Education Quality
Djibouti	2001	P044585	School Access And Improvement Program
India	1998	P038021	DPEP III (BIHAR)
India	2000	P050667	UP Third District Primary Education
Indonesia	1999	P040196	Sumatra Basic Education
Kenya	2003	P082378	Free Primary Education Support Project
Lesotho	2004	P081269	ESDP II (Phase 2)
Sri Lanka	1998	P010525	General Education II
Non-Education Sector investment projects with the highest percent allocations to primary: Closed since 1995 (n = 5)			
El Salvador	1991	P007168	Social Sector Rehabilitation
Mauritania	1995	P001857	General Education V
Mongolia	1996	P036417	MN - Poverty Alleviation
Togo	1999	P052263	Pilot Social Fund
Uganda	1990	P002966	Poverty and Soc Costs
Non-Education Sector investment projects with the highest percent allocations to primary: Active as of March 2004 (n = 5)			
Congo, Dem. Rep. of	2004	P082516	DRC Multisectoral HIV/Aids Project
Ethiopia	2003	P077457	ESRDF I Supplemental
Georgia	2003	P080376	Emergency Earthquake Rehabilitation/SIF Supplement
Ghana	2003	P071399	Partnerships W/ Traditional Authorities
Yemen, Republic of	2004	P082498	Ry-Social Fund For Development III

Appendix C: Projects in the Portfolio Review Sample (continued)

Country	Fiscal year	Project ID	Project name
Education Sector adjustment projects having some primary education: Closed since 1995 (n = 4)			
Côte d'Ivoire	1992	P001172	Human Resources Adjustment Program
Ghana	1990	P000896	Education Sector Adjustment Credit II
Kenya	1992	P001327	Education Sector Adjustment Credit
Mali	1995	P035662	Education Sector Adjustment Loan
Education Sector adjustment project having some primary education: Active as of March 2004 (n = 1)			
Tanzania	2002	P071012	Primary Education Development Program
Non-Education Sector adjustment projects supporting primary education: Closed (n = 4)			
Chad	2002	P035594	Economic Recovery Credit
India	1993	P009987	The Social Safety Net Sector Adjustment Program
Pakistan	2001	P071463	Structural Adjustment Project
Sierra Leone	1994	P074642	Economic Rehabilitation And Recovery Credit II
Non-Education Sector adjustment project supporting primary education: Active as of March 2004 (n = 1)			
Nicaragua	2004	P082885	Nicaragua PRSC I

APPENDIX D: EDUCATION PROJECTS AND LENDING AMOUNTS,1963–2005, BY COUNTRY

Country/Region	Number of projects with any education	Projects with 25–49% of loan for primary education		Projects with 50% or more of loan for primary education		Total lending for education	Total lending for primary education	
		No.	% of all projects	No.	% of all projects		Amount ($US millions)	Percent of total education lending
Afghanistan	8	4	50	1	13	141	64	46
Albania	8	1	13	1	13	37	17	46
Algeria	8	1	13	0	0	438	19	4
Angola	6	2	33	0	0	67	33	50
Argentina	21	0	0	0	0	1,137	200	18
Armenia	5	1	20	0	0	52	16	30
Azerbaijan	6	2	33	0	0	30	14	47
Bahamas, The	2	0	0	0	0	17	0	0
Bangladesh	23	1	4	5	22	1,074	538	50
Barbados	4	2	50	1	25	30	11	38
Belize	3	0	0	1	33	8	6	76
Benin	12	3	25	2	17	80	49	61
Bhutan	3	0	0	2	67	49	15	30
Bolivia	15	3	20	2	13	178	118	66
Bosnia and Herzegovina	9	1	11	2	22	50	23	46
Botswana	4	1	25	1	25	67	23	34
Brazil	32	3	9	12	38	2,824	1,486	53
Bulgaria	4	0	0	0	0	51	21	41
Burkina Faso	13	0	0	3	23	167	90	54
Burundi	10	2	20	1	10	107	43	40
Central African Republic	4	0	0	3	75	34	18	53
Cambodia	7	1	14	1	14	47	23	50
Cameroon	9	0	0	2	22	94	25	26
Cape Verde	4	1	25	2	50	25	13	53
Caribbean Region	**1**	**0**	**0**	**0**	**0**	**6**	**0**	**0**
Chad	10	1	10	4	40	112	72	65
Chile	10	0	0	1	10	478	131	27
China	33	1	3	5	15	1,903	446	23
Colombia	24	4	17	3	13	852	293	34
Comoros	5	2	40	1	20	26	13	50
Congo, Dem. Rep. of	8	1	13	2	25	123	68	55

(*Continued on the following page.*)

Appendix D: Education Projects and Lending Amounts, 1963–2005, by Country (continued)

Country/Region	Number of projects with any education	Projects with 25–49% of loan for primary education		Projects with 50% or more of loan for primary education		Total lending for education	Total lending for primary education	
		No.	% of all projects	No.	% of all projects		Amount ($US millions)	Percent of total education lending
Congo, Rep. of	6	3	50	1	17	48	22	46
Costa Rica	3	1	33	1	33	53	24	45
Côte d'Ivoire	13	3	23	1	8	478	35	7
Djibouti	6	1	17	2	33	23	19	82
Dominica	1	1	100	0	0	6	2	36
Dominican Republic	8	2	25	1	13	120	30	25
Ecuador	7	0	0	1	14	140	69	49
Egypt, Arab Republic of	13	0	0	1	8	454	51	11
El Salvador	10	2	20	3	30	272	119	44
Equatorial Guinea	1	0	0	1	100	5	4	85
Eritrea	8	0	0	1	13	122	40	32
Estonia	1	0	0	0	0	13	0	0
Ethiopia	17	3	18	1	6	423	128	30
Gabon	3	0	0	0	0	11	2	21
Gambia, The	5	0	0	2	40	47	23	50
Georgia	4	1	25	1	25	39	21	53
Ghana	18	2	11	2	11	460	136	30
Greece	4	0	0	0	0	142	1	1
Grenada	3	2	67	0	0	21	5	24
Guatemala	8	2	25	4	50	205	126	62
Guinea	11	1	9	1	9	174	76	43
Guinea-Bissau	4	0	0	2	50	22	17	74
Guyana	4	0	0	0	0	38	2	6
Haiti	6	3	50	2	33	55	33	59
Honduras	19	1	5	3	16	211	102	48
Hungary	4	0	0	0	0	344	4	1
India	30	1	3	9	30	3,450	1,923	56
Indonesia	58	2	3	4	7	3,193	379	12
Iran, Islamic Republic of	2	1	50	0	0	37	16	43
Ireland	2	0	0	0	0	38	0	0
Jamaica	10	0	0	0	0	162	15	9
Jordan	16	4	25	1	6	487	161	33
Kazakhstan	1	0	0	0	0	12	0	0
Kenya	18	1	6	2	11	484	77	16
Korea, Rep. of	15	0	0	0	0	756	1	0
Kosovo	2	1	50	0	0	6	2	41
Kyrgyz Republic	5	1	20	0	0	19	7	36
Lao PDR	9	0	0	2	22	40	24	60
Latvia	1	1	100	0	0	31	12	39
Lebanon	4	1	25	1	25	127	28	22

Appendix D: Education Projects and Lending Amounts, 1963–2005, by Country (continued)

Country	Number of projects with any education	Projects with 25–49% of loan for primary education		Projects with 50% or more of loan for primary education		Total lending for education	Total lending for primary education	
		No.	% of all projects	No.	% of all projects		Amount ($US millions)	Percent of total education lending
Lesotho	7	1	14	4	57	99	50	50
Liberia	4	1	25	1	25	31	11	35
Lithuania	1	0	0	0	0	25	2	9
Macedonia, FYR	4	1	25	1	25	22	13	57
Madagascar	19	0	0	1	5	271	118	44
Malawi	20	3	15	3	15	341	120	35
Malaysia	15	3	20	1	7	1,007	182	18
Maldives	5	0	0	0	0	51	5	9
Mali	14	2	14	1	7	187	39	21
Mauritania	9	2	22	1	11	150	53	36
Mauritius	6	0	0	0	0	72	9	13
Mexico	20	0	0	5	25	3,389	984	29
Moldova	6	0	0	2	33	31	18	57
Mongolia	1	1	100	0	0	3	3	100
Morocco	16	1	6	2	13	772	148	19
Mozambique	9	0	0	3	33	262	99	38
Nepal	15	3	20	4	27	204	107	53
Nicaragua	12	3	25	2	17	181	106	58
Niger	10	1	10	2	20	157	78	50
Nigeria	14	1	7	2	14	591	253	43
OECS Countries	**1**	**0**	**0**	**0**	**0**	**1**	**0**	**0**
Oman	3	2	67	0	0	35	7	20
Pakistan	24	2	8	8	33	1,546	944	61
Panama	3	0	0	2	67	76	46	61
Papua New Guinea	7	0	0	1	14	132	17	13
Paraguay	8	1	13	1	13	93	20	21
Peru	9	0	0	2	22	357	230	64
Philippines	18	1	6	5	28	836	519	62
Poland	3	0	0	0	0	97	3	3
Portugal	4	0	0	0	0	124	5	4
Romania	6	2	33	1	17	249	97	39
Russian Federation	7	1	14	0	0	491	68	14
Rwanda	9	4	44	1	11	124	53	43
São Tomé and Principe	3	0	0	0	0	4	2	50
Senegal	17	1	6	1	6	198	51	26
Serbia and Montenegro	1	0	0	1	100	4	3	69
Sierra Leone	8	2	25	1	13	69	42	60
Singapore	2	0	0	0	0	29	0	0
Solomon Islands	4	0	0	1	25	28	7	24

(*Continued on the following page.*)

Appendix D: Education Projects and Lending Amounts, 1963–2005, by Country (continued)

Country/Region	Number of projects with any education	Projects with 25–49% of loan for primary education		Projects with 50% or more of loan for primary education		Total lending for education	Total lending for primary education	
		No.	% of all projects	No.	% of all projects		Amount ($US millions)	Percent of total education lending
Somalia	5	0	0	1	20	56	26	46
Spain	2	1	50	0	0	62	4	6
Sri Lanka	6	0	0	1	17	241	53	22
St. Kitts and Nevis	1	0	0	0	0	5	0	0
St. Lucia	2	0	0	1	50	19	7	36
St. Vincent and the Grenadines	1	0	0	0	0	5	1	13
Sudan	3	1	33	0	0	34	3	9
Swaziland	3	1	33	1	33	19	8	44
Syrian Arab Republic	2	0	0	0	0	36	3	9
Taiwan (China)	1	0	0	0	0	9	0	0
Tajikistan	3	0	0	2	67	26	20	78
Tanzania	20	3	15	2	10	494	227	46
Thailand	10	1	10	0	0	469	10	2
Timor-Leste	2	0	0	0	0	1	1	76
Togo	6	0	0	3	50	72	32	44
Tonga	1	1	100	0	0	1	0	50
Trinidad and Tobago	5	1	20	1	20	110	45	41
Tunisia	14	2	14	1	7	730	114	16
Turkey	12	0	0	2	17	1,203	436	36
Uganda	20	3	15	2	10	390	250	64
Ukraine	3	0	0	0	0	54	5	9
Uruguay	6	1	17	3	50	195	102	52
Vanuatu	2	0	0	1	50	12	2	15
Venezuela, República Bolivariana de	5	1	20	0	0	125	43	34
Vietnam	10	0	0	3	30	406	272	67
Western Africa	**1**	**0**	**0**	**0**	**0**	**6**	**0**	**0**
Yemen, Republic of	30	2	7	4	13	437	194	44
Yugoslavia (see Serbia and Montenegro)	1	1	100	0	0	10	3	28
Zambia	13	0	0	2	15	239	85	36
Zimbabwe	3	0	0	0	0	11	4	39

Source: Internal World Bank databases: one for Education Sector projects and one covering projects managed by other sectors.

Note: This table includes projects with any commitments for education managed by the education and other sector boards.

APPENDIX E: WHAT ARE FAST-TRACK INITIATIVE COUNTRIES TARGETING?

Applicants to the Fast-Track Initiative (FTI) are asked to submit target benchmarks within the Indicative Framework (some of its main items are in the table below). The table shows the average on the framework items for 55 low-income countries (on track and off track) and the average for the 10 highest completion countries, which became the basis for the FTI benchmarks (goals, column "g"), 4 of which are also shown (c–f).

There is considerable variation on the Indicative Framework items across high-performance countries; for example, on item 1 (average teacher salary as percent of SDP per capita) the range is from 1.2 to 6.1; on pupil:teacher ratio, 20.6–45.3; average repetition rate, 2–18.3 percent, and education spending as percent of government recurrent costs, 10.9–28.3 percent.

The guidelines for the use of the Indicative Framework indicate that the benchmark "should not be applied rigidly." Nevertheless, among the four FTI countries observed in this evaluation, having very different characteristics and constraints, the target values in the indicative framework appear to mirror the benchmarks quite closely. For example, Niger's targets diverged from the benchmark on only two of seven indicators: on average teacher salary (where the difference was minor) and on average repetition rate, where Niger's low target reflects a policy of automatic promotion.

Table E.1: FTI Indicative Framework: Some Benchmarks for Baseline and Partner Countries

	Baseline mean values						2015 targets in FTI, some partner countries			
	Whole sample (55 countries) (a)	Highest completion countries (b)	Bolivia (c)	Lesotho (d)	Vietnam (e)	Zimbabwe (f)	FTI Indicative Framework benchmarks (g)	Honduras (h)	Niger (i)	Vietnam (j)	Republic of Yemen (k)
Service delivery											
Average teacher salary[a]	4.4	3.6	2.2	6.6	1.2	6.1	3.5	3.5-4	3.9[c]	2.19	3.4
Pupil:teacher ratio	46	39.6	20.6	45.3	30.4	39	40	37.5	40	26.6	28
Non-teacher salary share of recurrent spending	23.8	25.2	19.4	30	45	25	33	32	33	35.6	32
Average repetition rate	16.6	8.2	3.7	18.3	3.5	2	10	2	5	0.8	6
Domestic resource mobilization											
Government revenues as % of GDP	19.6	20.7	21.2	35.9	22.3	27.4	14/16/18[b]	18	14	23	34
Education spending as % of recurrent budget	16.9	18.5	25.2	22.2	10.9	28.3	20	22	20	20	17
Primary as % of recurrent education spending	49.3	47.2	47.5	40.2	46.5	46.1	50	51	50	30	48

Source: Bruns, Mingat, and Rakotamalala 2003 and country FTI proposals.

Note: GDP = gross domestic product.

a. Expressed as a multiple of per capita GDP.

b. Staggered targets proportional to per capita GDP. For a six-year primary cycle, these imply domestic expenditure on primary education equal to 1.4 percent, 1.6 percent, and 1.8 percent of GDP, respectively.

c. This figure reflects remuneration for newly hired teachers.

APPENDIX F: PRIMARY EDUCATION EVALUATION TERMS OF REFERENCE FOR COUNTRY-LEVEL ANALYSIS

Background

The World Bank's Independent Evaluation Group (IEG) (formerly Operations Evaluation Department) has undertaken an evaluation of the effectiveness of Bank support to primary education. The purpose of the evaluation is to examine the effectiveness of the Bank's assistance—its policy dialogue, analytic work, and lending—in support of country improvements in primary school access and educational outcomes, particularly since the beginning of the Education for All (EFA) movement in 1990, with an eye toward influencing the design and effectiveness of current and future Bank policies and programs. The evaluation has produced two background papers (Boissiere 2004a, b) and a desk review of the portfolio of World Bank lending for primary education. In the next phase, the evaluation will undertake a series of country-level analyses.

Whereas the portfolio review covered only lending and used the project as the unit of analysis, the country-level analyses will cover all modalities of Bank influence: policy dialogue; analytical work; technical assistance and capacity building; lending; and conditionality. It views these in an integrated manner vis-à-vis improved primary school access and learning outcomes, and in light of the country's educational goals, policies, and EFA plans; and social, economic, political, and infrastructural conditions.

Objectives

The objective of the country-level analysis is to evaluate the effectiveness of Bank assistance to countries in improving primary school access, educational outcomes, and equity. Primary school access will be measured in terms of *quantitative expansion* (increasing geographical coverage, enrollment ratios, and completion rates). Educational outcomes in the analysis will include *achievement gains* in basic knowledge and skills (especially literacy and numeracy) and (time and data permitting) employment and welfare outcomes (improved health and nutrition and reduced fertility). *Equity* with respect to increased access to schooling and improved learning outcomes will be measured by examining the distribution across social groups, in particular females, those from low-income families, linguistic or cultural minorities, those who live remote or difficult areas, and the disabled.

Country-Level Analysis Instruments

Country-level analysis will be of two types—"enhanced" PPARs and country case studies.

PPARs are conducted by IEG on about one-quarter of all completed Bank lending projects as a means of ensuring the integrity of the Bank's self-evaluation process and developing experience-based lessons for improved directions, policies, and procedures. They are often used as "building blocks" for larger evaluation studies, such as the current evaluation of primary education. PPARs generally cover the performance of one or more related projects in a single country. The PPARs contributing to the country analysis for this evaluation will address standard IEG questions related to project outcomes, sustainability, and institutional development but will be "enhanced" with additional contextual information related to country EFA plans and Millennium Development Goals (MDGs), general country indicators of progress on primary education access and learning outcomes, the programs and contributions of other development agencies, and the objectives and features of ongoing Bank support

to primary education. The "enhanced" PPARs will also comment on any lessons learned with respect to the key evaluation themes.

Country case studies are more comprehensive assessments, organized exclusively for this evaluation, and will cover the full range of Bank supports related to primary education plus country contextual factors related to their success and failure.

Both the enhanced PPARs and the country case studies will assess the effectiveness of the Bank's assistance relative to the counterfactual (what would have happened if there had been no Bank support?).

Questions to Be Addressed

Evaluation questions for the country case studies stem from the main evaluative questions specified in the evaluation Approach Paper. They also take into consideration the channels of Bank influence represented in figure B.1 (see page 60). The figure depicts the main explicit channels (that is, mentioned in project documents) through which Bank assistance can influence educational outputs and outcomes, for example, through government policy and institutional capacity, specific features of the educational system (facilities, books, teacher status and quality, and teaching-learning processes), and increased demand for education, plus other enabling factors such as improved donor cooperation, civil service reform, support for complementary sectors, and actions in the private sector and by civil society. The main analytical questions refer to the items in the central boxes in figure B.1:

- Government policy and capacity
- Delivery of education services
- Household demand for education
- Outputs and outcomes.

The questions to be asked in all cases are: (a) What changes have taken place since 1990? (b) To what extent have Bank efforts (though lending and nonlending channels) contributed to those changes? and (c) To what extent would the changes have taken place in the absence of Bank support?

The question list will remain flexible enough to cover other salient questions and issues that might emerge from other boxes in the framework (for example, about private education or other levels of education) or country context (political economy, catastrophic events) as appropriate. To facilitate analysis and reporting, a standard set of appendixes will be compiled for all PPARs and case studies covering the following:

- A timeline of key national educational policies and events, and key points of intervention of the Bank and other donors
- An inventory of World Bank assistance to the country, including lending and nonlending supports to primary education; similar inventories for other major development agencies and their principal lines of support
- Tables showing the trends in public expenditure on primary education and education overall: capital and recurrent expenditure; within recurrent, salary, and nonsalary expenditure
- Tables showing changes in major educational development indicators over time: enrollment, graduation, dropout and promotion, transition rates (primary to secondary), and learning outcomes (scores on official, standardized examinations)
- Description of the political process of policy and program formulation, covering such items as where the initiative for the program came from, who was at the table during negotiations, what the main sources of conflict were, who the winners and losers were, and who had ownership of the program/policy
- A listing of challenges and obstacles that presented themselves in the implementation of programs for improving access and outcomes of primary education.

Lessons Learned

In addition to assessing the effectiveness of the Bank's assistance to primary education, both the PPARs and the country case studies will highlight the lessons learned from the Bank's experiences in supporting primary education with respect to the following:

- The kinds of trade-offs made between quantitative expansion and quality improvement and the factors influencing them
- The relation between the choice of lending instrument (for example, investment versus adjustment) and modalities (for example, Adaptable Program Loans [APLs], Sector Wide Approaches, and community-driven development—that is, use of "social funds" and similar modalities) and both ownership and effectiveness
- The conditions under which decentralized management in the delivery of primary education has been effective
- Successful efforts to improve monitoring and evaluation of service delivery, student learning outcomes, and the use of this information to improve decision making
- Institutional development in the field of primary education (problems and efforts to improve subsector governance and management)
- Donor coordination to enhance the effectiveness and efficiency of primary education assistance.

Sources of Data

The expanded PPARs and country case studies will rely on the following sources of data:

- A review of the literature on primary education in the country in question (covering research; policy studies; and previous evaluations by governments, the World Bank, and other development agencies)
- Analysis of data (enrollment and completion data, broken down by gender, Region, and socioeconomic status of subjects; student learning outcome data, household survey information [for example, on educational attainment and/or achievement]; government and donor expenditures, service delivery data, data on private sector and nongovernmental organization [NGO] activities)
- Semistructured interviews with key actors (officials in the Ministry of Education, particularly "champions" of primary education improvement and program entrepreneurs; technical staff who were at the table during project/program design; parliaments or parliamentary committees; local government officials; actors playing significant roles in project implementation; any relevant alliances or coalitions of NGOs, teachers unions, social movements, and parent-teacher associations; community leaders, especially those involved in school committees or councils; school teachers; World Bank staff; other development agency representatives; and private sector providers)
- Field visits to schools, school councils, teacher or management training programs, and regional or local offices of education (preferably selected among outliers, good and bad)
- Any additional data collection or analysis, as necessary.

Expected Outputs

The outputs of the two kinds of country-level analyses will be in the form of individual study reports.

Country Selection Criteria

There will be six to seven enhanced PPARs, in addition to four country case studies and an impact study in Ghana already completed.[1] Countries have been selected on the basis of the record of effectiveness for Bank-supported projects to include both those that have had success in this regard and those that have not. Recognizing the positive correlation between wealth and better learning outcomes, countries were also stratified on the basis of their income (low income or lower-middle income). Only countries that were relatively large recipients of Bank support were covered (at least $100 million borrowed);[2] an attempt was made to cover both large and small countries and to represent all regions of the world. The countries proposed for enhanced PPARs (in italics) and country case studies (in bold) can be seen in table B.1.

Staffing

PPARs will be conducted by IEG Sector, Thematic, and Global Evaluation staff members. Country case studies will be conducted by pairs of external consultants plus one or two domestic consultants from the case study country.

Pakistan

This case study is one of four that aim to assess the Bank's support for primary education within specific country contexts. This is a difficult task in a country as large as Pakistan (population about 148 million) with a complex federal structure of government and a long history that has resulted in a mosaic of ethnic and cultural diversity, even though it is a majority Muslim nation.

Nonetheless, it is important to attempt this task and to address major issues in primary education such as access, quality, and equity. Although the Bank has been involved in education in Pakistan since 1964, the time frame for this study of primary education is from about 1990, the year of the World Conference on Education for All (EFA) in Jomtien, Thailand, and also the issue of the Bank's major Primary Education Policy Paper, to March 2005, the time when the fieldwork for this study was undertaken in Pakistan.

Primary Education in a National Context

The main story of primary education (grades 1–5) in Pakistan since independence from Great Britain in 1947 is that of the struggle to achieve universal primary education (UPE) within an adverse environment of severe resource constraints, organization and management problems, and inadequate institutional incentives. In addition, rapid population growth of about 3 percent throughout most of the post-independence period has put pressure on the primary education system, making it difficult to raise enrollment rates. Only recently is population growth slowing to somewhat above 2 percent. Demand-side factors are also come into play, including factors such as traditional attitudes limiting girls' participation in schooling.

A strong role for education was recognized by the founding fathers of independent Pakistan, and UPE was established as a goal at the first National Education Conference in 1947. However, military tensions with India and perceptions of national security needs led to relatively high military spending and relatively low education spending—an unfortunate spending pattern that continues up to now.

By the end of the 1990s, the proportion of gross domestic product (GDP) spent on education had not risen as expected and was 1.7 percent in 2001–02 versus 2.1 percent in 1991–92. Spending on primary education as a share of GDP was low at about 0.8 percent of GDP in 2000–01 (see IEG 2004e).

Over the years the goal of UPE has been repeated by a number of national conferences and policy papers, shifting the goal further into the future, and it is presently set for the year 2015 in agreement with the education MDGs. However, political instability since independence has been a factor in holding back the capacity of the primary education system to respond effectively in achieving this goal. Political instability in the 1950s led to the first military regime of General Ayub Khan, who governed throughout most of the 1960s. The civilian government of Zulfikar Ali Bhutto came to power in the 1970s after the civil war, resulting in the loss of West Pakistan and the creation of Bangladesh. Prime Minister Bhutto attempted many policy changes under the banner of an Islamic Socialist regime, including the nationalization of many private educational institutions.

The civilian government of Prime Minister Bhutto was overthrown in 1978 by General Zia

ul Haq, who introduced privatization and deregulation policies to counter Bhutto's socialist policies. General Zia also introduced far-reaching changes in education policy, including his version of Islamization of education. This included establishing mosque/maktab primary schools, supporting madrassas (religious seminaries beyond the primary school level), and revising all subjects in conformity with Islam and requiring teaching of Islamiyat up to grade 14 (early years of university).

The opening of mosque/maktab schools was an attempt to increase dramatically access to primary school by adding regular primary school subjects to traditional religious instruction provided to young children in the local mosque. The program was abandoned later because it was not effective at teaching academic subjects, due in part to the fact that the local imams were not trained teachers.

The regime of General Zia came to an end with his death in 1988, leading to a decade of elected civilian governments. However, many Pakistanis refer to the 1990s as the "lost decade" because of political instability and economic stagnation. There was an alternation of elected civilian governments between Benazir Bhutto (daughter of Zulfikar Ali Bhutto) and Nawaz Sharif, leaders of the two main political parties. Political corruption was also on the rise, especially in the provinces, affecting primary education through processes such as political patronage in the appointment and deployment of teachers. However, as a participant in the Jomtien EFA Conference (1990), Pakistan committed itself to the goal of UPE by the year 2000.

The decade of civilian rule came to an end in 1999 with the military government of General Pervez Musharraf, who was Chief of the Army Staff under Prime Minister Sharif. Broad education policy remained the same, and Pakistan participated actively in the EFA follow-up conference in Dakar, Senegal, in April 2000, again signing on to the goal of UPE, this time by the year 2015.

The events of September 11, 2001, and the ensuing war on terror proved to be defining events for the government of General Musharraf and Pakistani society as a whole. General Musharraf aligned his government with the war against terrorism and also against the Taliban regime, previously an ally of Pakistan. Partly as a result of this, aid flows have increased dramatically and the economy has shown a marked improvement compared with the stagnation that characterized the 1990s.

World Bank and Other Donor Support

The Bank has been active in primary education, financing 25 projects since its first project in 1964 for agricultural education. During the 1960s the manpower planning approach was dominant within the Bank and with other donors, and during the 1970s that gave way to basic needs and then the rate of return to education approaches, both of which stressed primary education. Primary education increasingly became the focus of Bank education sector support in Pakistan. There have been 19 projects and broader operations that have supported primary education in Pakistan that total $1,365 million. The component activities of these projects were similar in most cases, involving teacher training, textbooks, and school construction.

Other donors were active in primary education in Pakistan, the largest including the Asian Development Bank (ADB), Department for International Development (DfID) of the United Kingdom, and the United States' Agency for International Development (USAID). The ADB has been especially active in teacher training. Overall, donor coordination has been reasonable, with the Bank being the largest donor, thereby having the most influence.

Looking back over Bank support, including economic and sector work (ESW) as well as lending operations, the Bank can be seen to be struggling to come to grips with the complexities of working in Pakistan. First, there is the federal structure of government, which often resulted in coordination problems between the federal level and provincial governments. The Bank thus tended to move toward more provincial level projects and programs. Second, each province has its ethnic and cultural mix and different alignments of political parties. Third,

each province has its own implementation problems, resulting in part from the first two factors. Thus the Bank was struggling to learn: (a) What is the right thing to do? and (b) What is the right way to do it?

Summary of Recent Changes in Primary Education

Government policies and capacities

Government policy for primary education has always been aimed at UPE, with the target dates constantly shifting. Government policy also has always cited quality and equity goals, including the poor and girls' education. During the 1990s a number of Bank-supported provincial education projects were aimed at creating the capacity to achieve these policy goals. Thus there were the Sindh Primary Education Project (1990), Balochistan Primary Education Project (1993), the Northwest Frontier Province Project (1995), and the Northern Education Project (1998).

The big push to achieve this policy goal was the first Social Action Program Project (SAPP, 1994), which aimed to support a significant part (about 10 percent) of the government-initiated Social Action Program (SAP) that aimed to make a rapid improvement in Pakistan's social indicators (education, health, and poverty). This was followed by a second SAPP (1998). The results of both were disappointing.

Many people interviewed look at the 1990s as the SAP phase of government and Bank involvement and the period since 2000 as the post-SAP phase. These two projects were too large (together $550 million in Bank support), too complex, and poorly designed in terms of mechanisms for implementation. For example, there were many donors involved, and supervision missions were large and unmanageable. Disbursement mechanisms were too complex and placed an unduly large reporting and documentation responsibility on an educational administration that could barely handle its normal day-to-day responsibilities.

Based on these lessons, the more recent Punjab education adjustment credits (2004 and 2005) have simplified disbursement of a single tranche of $100 million with a substantial matrix of primary education policy reforms. That can work well with a province that is committed and capable, and it remains to be seen if this can work in other provinces such as Sindh, which has expressed interest in such an approach. New comprehensive sector work is planned for that province, which can lead to an assessment of what can be appropriate there.

Delivery of education services

Despite the many implementation problems that arose during the 1990s, schools were built and public primary enrollment did increase at an annualized rate of about 6 percent (10.8 million in 1990 to 19.5 million in 2000). Such enrollment growth would compare favorably with Indonesia's experience during its well-known school construction program in the 1970s and 1980s. However, Pakistan started from a very low base level of about 16 percent gross enrollment rate at the time of independence and experienced high population growth of about 3 percent, so progress in improving enrollment rates was slow.

The delivery of quality primary education was negatively affected by the availability of teachers and the low quality of those available. Teacher absenteeism was constantly cited as a problem in rural areas. Also, many teachers of low qualifications were appointed, sometimes as a result of political patronage. Research studies by Warwick and Reimers (1995) document the poor quality of teacher training as well, with many primary school teachers not performing much better than pupils on grade 5 reading and mathematics tests.

The curriculum and textbooks also leave much to be desired. They rely heavily on rote learning without real understanding and, according to many observers, contain excessive ideological material and religious indoctrination resulting from the time of General Zia's drive to Islamize education. This situation is not unique to Pakistan; Bank research is beginning to examine in more detail the academic and social content of primary school textbooks in a number of countries (see the latest Bank *Education Sector Strategy Update* [World Bank 2005b]).

The two most significant changes in the delivery of primary of education are the decentralization of government services and the rising demand for private primary education. The Musharraf Government introduced an ambitious program of decentralization in 2001, partly to improve service delivery and partly to restore civilian politics by going around the established national political parties, thus holding elections at the local levels without candidates declaring affiliation with a national party. The recent trend toward private primary education is seen by many people as response to the poor quality of public primary education, with the result that many poor families struggle to pay fees in private primary education based on the belief that their children will receive a better education in private schools, though some are very low cost and quality is not yet proven.

Household demand for education

Nearly all research shows that the level of parents' education has a direct impact on the education of their children. However, in the patriarchal household structures of Pakistan, in which men are socially assigned a strong role as the head of the family, there is attenuation of this insofar as many parents prefer to invest in the education of sons.

However, many officials now report that the acceptance of education for girls is growing. If schools lack boundary walls or require a very long walk, the demand for girls' schooling decreases because of parental concerns about their daughters' safety. In addition, remnants of feudal structures in the rural areas of Pakistan also constrain demand for primary education, since feudal land owners still exercise much influence and often do not encourage education among their populace.

Educational outputs and outcomes

Trends in output indicators (enrollment rates) are available, but outcome trends (learning achievement and employment) are not. Gross enrollment rates (GER) have been somewhat stagnant in recent years, being 75 percent, 71 percent, and 72 percent in 1995–96, 1998–99, and 2001–02, respectively. These figures are based on household surveys, and some observers are puzzled by the data, given that the ambitious SAP projects were expected to have some impact around this period.

Also puzzling is that fact that two major household surveys do not agree for some measures. The Pakistan Social and Economic Survey gives 84.3 percent for the GER in 2000–01 while the Pakistan Integrated Household Survey gives 72 percent in 2001–02. However, the two surveys are closer for net enrollment rates (NERs), with the Pakistan Social and Economic Survey giving 48.6 percent and the household survey giving 42 percent for the same years. The reasons for these differing measurements are not clear.

Many education analysts now favor using the primary completion rate, defined as the ratio of number of children completing primary education over the number of children of primary completion age, as an outcome indicator for measuring the success of EFA. While there is no time series for this measure in Pakistan, there is an estimate for the year 2000–01, giving an overall primary completion rate of 51.3 percent. For male and female, the breakdown is 69.4 percent and 64.6 percent for urban versus 51.6 percent and 34.8 percent in rural areas.

There are no time series for learning achievement over time, although the National Education Assessment System Project (2003) is introducing an assessment system for grades 4 and 8. The first results of the grade 4 assessments should be available in 2006. Pupils are to be tested in four subject areas: reading, mathematics, science, and social studies/ Islamiyat.

Pakistan does not have a national examination for a certificate of primary school completion, which could provide some insight into this issue. However, tests given in some regions on a one-off basis as a part of various research projects and other more qualitative judgments by informed observers indicate that the trend for learning achievement overall would be flat at best, or probably even declining, for public primary schools.

Finally, in terms of labor market and welfare outcomes related to primary education, there are a few research studies that show that the wider economic and social benefits to primary education in Pakistan are much the same as in comparable developing countries.

World Bank Contribution

The Bank's ESW has been an important factor in the education dialogue with the Pakistani government and in recent years with civil society organizations and NGOs. As explained by one of the interviewees, this is where the Bank was strongest and helped the government to focus on policy objectives. Although the last comprehensive piece of sector work, covering all levels of the system, was the Education Sector Report in 1988, that report was influential in setting the framework for the provincial primary education projects of the 1990s.

Subsequent ESW, although generally of high quality, focused on specific analytical issues, such as girls' education. As a result, there was a noticeable change in the attitudes of government to problems and benefits of more education for girls. The Bank also had an impact on emphasizing the monitoring of quality and learning achievement, resulting from a long period of dialogue in the National Education Assessment System Project.

Implementation of Bank-supported projects encountered many difficulties over the past 20 years, perhaps more than the average level of difficulty for the Bank's primary education projects as a whole. This was especially true for the two large SAP projects—SAPP1 in 1994 for $200 million (60 percent to primary education) and SAPP2 in 1998 for $250 million (60 percent to primary education). Most government and NGO persons interviewed expressed the view that this project was poorly designed and that the Bank and other donors put too much of a burden on a system that lacked the capacity to effectively absorb such large infusions of funds.

For example, the disbursement procedures involved the government through prefinance expenditures and to seek reimbursement through submitting Statements of Expenditures. Although this appeared simple in principle, in practice the federal and provincial education administrations were overwhelmed by the large number of small transactions to be documented and were often not clear as to what expenditures were actually eligible for reimbursement.

Other specific investment projects for primary education had a variety of implementation difficulties and delays. Slow disbursement thus became the norm, and the overall disbursement percentage after project completion for primary education projects in Pakistan was 72 percent of the approved amount, compared with the Bank-wide average of 93 percent for IDA-financed primary education projects (see IEG 2004d). However, despite these difficulties, without the Bank's persistent efforts to keep access, quality, and equity issues on the agenda, it is likely that even less progress would have been made in increasing school enrollment, especially for girls and the poor.

Lessons

Virtually all the Bank's projects and ESW emphasized quality of learning in primary education, but in practice there was no way of measuring this during the projects of the 1990s. For example, the Sindh Primary Education Development Program (1990) financed activities and inputs that were believed to be important for improving learning, but it was not until the National Education Assessment System Project (2003) that a system was put in place to monitor learning achievement at the primary school level. In practice, as the mission was informed by some provincial-level officials, there was a trade-off made between quality and quantity, and only now are they really turning attention to quality.

There are also lessons about which instruments might best achieve objectives and how decentralization of government can relate to instruments. Large programs such as the SAPPs that try to pump large sums of money through an incompetent and sometimes corrupt bureaucracy cannot work. A careful mixture of specific investment and sectorwide approaches must be considered for the education portfolio. Good specific investment projects can lead to building the capacity that can later be used in a more

decentralized approach in the provinces and with the flexibility and speed that can come from a sectorwide approach. Also, the need for intensive training for decentralization to work is apparent in Pakistan, as it is in many other countries that have tried it.

The need for donor coordination is important, but an important lesson of SAPP1 and 2 is to avoid donor coordination becoming an undue burden on the counterpart agencies. While the formation of the Multi-Donor Support Unit for the SAPPs was a positive development, it is important to build up the capacity of the government so it can take the lead in donor coordination.

Conclusions

Overall, the development effectiveness of Bank support for primary education can be rated as marginally satisfactory during the 1990s. Since then, the effectiveness of Bank support has improved to a more solid satisfactory level, based on the lessons learned during the 1990s and an improved understanding of the difficult implementation environment in Pakistan. A few conclusions in the way of broad directions to explore would include the following:

- The Bank should return to the more comprehensive approach to sector work taken in the 1988 Education Sector Report covering all levels of education and their interactions, but do this in a province-specific way. It is important that the analysis of primary education be embedded in the whole education system to take account of fiscal interactions and the inter-relationships of quality at different levels. It is important to do this in a province-specific way because of the large variance in capacity and ethnic/cultural mix among the provinces.
- While the ESW should become more comprehensive, the Bank would do well to focus its lending operations in those areas where it can make the most impact. This would have to be done in coordination with other donors and with the government taking a lead role. Attention would have to be paid to how to enhance the government's capacity to take this lead role. There should also be a judicious mix of specific investment projects and sectorwide program approaches, each one being used in the appropriate circumstances.
- The Bank needs to think carefully about how to engage the government about sensitive topics related to curriculum reform and textbook provision. In the cognitive domain there is excessive reliance on rote learning to the detriment of genuine cognitive development. In the social domain there is inappropriate ideological material in the curriculum about religion and other political issues that are detrimental to promoting social cohesion. The recent *Education Sector Strategy Update* (World Bank 2005b) points out that the Bank is starting to address this issue in other countries and could provide a starting point for initiating dialogue about these complex and sensitive issues.
- Perhaps the most important area of policy and program support for Bank assistance is to help Pakistan craft a realistic strategy for achieving quality EFA. Recent Bank reports indicate that Pakistan is far from this goal and not likely to achieve it by the year 2015 as specified in the education MDGs. If it turns out that the year 2015 is unrealistic, then a careful analysis is needed of what is possible, what resources are required, and when it can be achieved.

Peru

Since 1990, the World Bank developed and launched two major education loans in Peru, one (1995) aimed at improving urban primary education and the second (2002) at improving rural primary education. The first loan totaled US$146.5 million, and along with counterpart funds, invested nearly US$300 million in building urban primary schools, developing and distributing school textbooks, and improving classroom teaching. The second loan is still in progress, but it will end up investing roughly $170 million over four years (with counterpart funds nearly US$350 million) in improving rural primary teaching, testing incentive systems to improve teacher and student attendance, and developing a secondary school distance education system.

The objective of this case study is to evaluate the relevance and effectiveness of World Bank efforts in supporting primary education in Peru.

To carry out the task, the mission team interviewed 7 of the 16 current and former Ministers of Education from 1990 to 2005, a number of key past and present educational policy makers who have been involved in the negotiations and implementation of the two loans, the local World Bank education representative, and representatives of other international agencies who lend for or provide technical assistance to education in Peru, including the Inter-American Development Bank and the German Agency for Technical Cooperation (Deutsche Gesellschaft für Technische Zusammenarbeit). The mission also visited a number of schools, where mission members interviewed administrators, teachers, and parents and observed classes.

During the period analyzed by this report, 1990–2005, the World Bank lent only for primary education (grades 1–6) in Peru, although the rural primary loan does include a component for secondary distance education. The Bank has been a major force in stimulating primary education improvement in Peru, largely because the Ministry—aside from counterpart funds for Bank loans—uses essentially its entire available primary education budget to pay salaries and to meet other usual current expenses. Further, Peru has changed education ministers annually, on average, over the past 15 years. Thus, the Bank has ended up being an important shaper (as well as institutional memory) of many, if not most, Peruvian primary educational improvement efforts during this period.

Primary Education in the National Economic and Political Context

The context for these efforts was an economy that suffered serious setbacks in the 1980s (GDP decline and rapid inflation), a political system threatened in the 1980s and 1990s by terrorists, assaults on the Constitution by the elected president in the late 1990s, and the undermining of the political system by drug cartels. In education, beginning in the 1970s, a series of governments emphasized expanding access more than improving quality.

Educational attainment is relatively high in Peru but still very unequally distributed between urban and rural areas. The past 15 years of primary school expansion have produced near universal access to full primary education. The majority of urban youth are also likely to finish secondary education (64 percent of urban 16- to 18-year-olds have completed secondary school), but the vast majority of rural youth do not (only 24 percent of 16- to 18-year-olds have competed secondary). In urban areas, a relatively high percentage of youth also attends some years of post-secondary school.

Peru expanded education largely by making it less expensive—principally by reducing teacher salaries in real terms. Except for 1985–87 and an earlier spending jump in 1980–81, educational spending per student fell steadily since the early 1970s. Indeed, by 1990, spending per student had fallen about 60 percent from 1973–74 levels, whereas GDP had risen about 14 percent and GDP per capita had fallen about 23 percent. This necessarily meant steep declines in teachers' real salaries.

Teachers earned about 25–30 percent more than per capita income in the early 1970s and earned about 23 percent less than per capita income in 1990, a drop of about 50 percent relative to the average Peruvian's economic situation. Part of this fall in teachers' relative position is due to an increase in average education in Peru's labor force, but part is due to a fall in teachers' wages relative to those of other professionals.

Quality of education, as measured by pupils' scores on international tests, is at the low end in Latin America, much below the results in Mexico, Chile, Argentina, and Colombia on the same tests. This is not just an artifact of Peruvian students' lower average socioeconomic background. The top 10 percent of achievers in Peru on the Programme for International Student Assessment (PISA) scored at about the same level as the 60th percentile in Argentina. On UNESCO's LLECE test, higher socioeconomic background Peruvian pupils also scored much lower than their counterparts in many other Latin American countries, and rural Peruvian students scored among the lowest in Latin America.

World Bank Support for Expanding and Improving Primary Education

The initial history of World Bank support for Peruvian education mirrors that of many other Latin American countries: loans for primary education in Peru started only in the mid-1980s, following the 1970s (technical and vocational) and 1960s (tertiary) project cycles. In 1984, a loan to improve and expand primary education was signed, with the goal of supporting the first 3-year phase of a 10-year education program designed to do the following: (a) provide sufficient and adequate student places for school-age children, (b) improve the quality of primary education, and (c) improve primary education management. The loan became effective in June 1985; less than two years later the Bank suspended disbursements to Peru. The project outcome was rated as unsatisfactory.

In 1993, the Fujimori Government, with Bank support, developed an extensive diagnostic of Peruvian education and called for actions to improve educational quality, efficiency, and equity. That report led to the design of the Primary Education Quality Project (MECEP). The report pointed to key issues of instructional materials, teacher training, public school autonomy and accountability, school infrastructure, and bilingual-intercultural education.

Together, the first four issues became the basis for the broad 1994 MECEP Loan in the amount of US$146.4 million (with a government contribution of US$107.5). Though not initially contemplated in the project design, school infrastructure became the project's largest component (nearly half of project funds). This was the direct result of President Fujimori's insistence on school construction as the project's main goal. To ensure that school buildings did not take priority over "soft" investments, Bank staff set specific yearly targets for textbooks and training. Achievement of these targets triggered the release of funds for the construction component.

Beginning in 2001 the Bank signed a series of Programmatic Structural Adjustment Loans, designed to transfer funds directly to the Ministry of Finance in exchange for a broad array of social sector policy reforms (including health, education, and social protection). Each of the Programmatic Social Reform Loans I-IV (PSRLs) was signed in the amount of US$100 million (except for PSRL III, in the amount of US$150 million). Through the PSRLs, the Bank financed the publication of both international (UNESCO/LLECE) and national assessment results; establishment of monitoring and supervision systems, including creation of a payroll system to track the problem of ghost teachers and compare teaching responsibilities with payroll amounts; piloting of a program of local control in the distribution of salary incentives for rural teachers, guaranteeing budgetary allocations for counterpart funds for finalizing MECEP; and development of a monitoring and evaluation system designed to provide transparency of information during the decentralization process. In 2004, a Technical Assistance Loan in the amount of US$7.8 million was signed to support the development of an accountability system for decentralization in the social sectors, particularly with regard to improved monitoring and evaluation activities.

In 2003, the Bank and the Toledo Government realized a long-in-gestation Rural Education Project. The first-phase PEAR APL was signed in the amount of US$52.5 million (with a government contribution of US$29.5 million and an Inter-American Development Bank contribution of US$12.2 million). The total program amount of the 10-year, three-phase APL is expected to be US$347.2, of which US$172.5 is a World Bank loan. Project components include expanding access for rural children, improving quality in rural primary school, and reforming teacher policy and education management. Expansion of access under the first project component focuses on both preschool and secondary education.

These loans represent significant amounts of money in the context of Peruvian educational spending. The $300 million of the primary education loan in 1995–2000 represented about 5–6 percent of the total education budget for those 5 years and almost 20 percent of the total budget for primary education. The rural education loan now under way is much smaller but also represents a significant fraction of the money going to rural primary education.

The Bank's Contribution to Sectoral Changes in the Past 15 Years

Each of the two Bank-supported projects and PSRLs implemented during this period (1990–2005) has generally been based on recommendations from detailed research-based diagnostics. These diagnostics were important in shaping the direction of the projects and helped to build consensus around the challenges and potential solutions for the MECEP in the 1990s and the rural project. The activities outlined in the MECEP and PSRL projects seemed appropriate to education sector conditions in the country at the time and usually focused on areas where the Bank could contribute with extensive experience and technical assistance, for example, in textbook production, teacher training, and teacher incentive pilots, and distance education in rural areas.

Although the design of MECEP was relevant to the needs identified in the diagnostic, as highlighted in the IEG review, the institutional development component was overly ambitious, especially given the volatile nature of the political context and the lack of specific project measures to help the Ministry develop and build consensus around proposed reforms of school governance (especially autonomy) and administration (for example, decentralization reforms).

Though proposed in the original project design, which did not adequately take into account issues of political will, neither school autonomy nor regional decentralization was implemented under the MECEP design, though some aspects of the original design would appear both in later projects (such as the rural project) and through independent ministry actions, such as the new teacher-hiring process implemented at the beginning of the Toledo presidency.

There are three important caveats to the overall positive assessment of the relevance of Bank-supported project activities. The first is the inclusion of the construction component in the MECEP, which was not originally seen as a priority in the sector diagnostic. The Fujimori Government, however, had threatened not to have a project at all unless the construction component was included; in exchange for guaranteeing advances in other areas, Bank staff included school infrastructure. In hindsight, there was considerable need for physical school improvements, though, as discussed below, these likely would have occurred even without an MECEP project.

The second caveat relates to the low level of institutional capacity building in project activities. The Bank did help modernize the Ministry through financing the technical assistance, hardware, and software to install information systems for payroll and record keeping. The Bank financed the technical assistance to make the Ministry more cost efficient through the elimination of many superfluous payroll positions. The Bank also supported the ministry in developing and sustaining the Quality Measurement Unit, which has done excellent work in achievement measurement and analysis over the past 10 years. Yet at the same time, the Bank-created and -financed Project Management Unit in the ministry has had little impact on training people in the rest of the ministry or in departmental offices or installing management systems that permanently become part of the ministry's mode of operation.

One of the main problems in this regard has not been under the Bank's control—the almost constant change of ministers in the past 15 years. It is telling that the implementation of the MECEP and PLANCAD (the National Plan for Teacher Training) is largely due to the fact that one minister, Domingo Palermo, lasted three years during the Fujimori regime.

The third caveat concerns the absence of evaluation and monitoring of project activities and impact. There have been no ex post evaluations of project impact even though data are or could have been available for assessing the effect of textbooks and teacher training on student achievement over the five-year period 1996–2001. There is some indication that test scores for primary school children have remained relatively constant throughout the period, and this at a very low level compared with other large Latin American countries. However, this indication is not based on strict comparisons of like items on tests at the fourth-grade level, for example, which would have been

possible if Bank or Bank-financed ministry staff had built project evaluation into the Bank-supported project. In the absence of further evaluation, we do not even know if teachers changed their practice. We do know that thousands of teachers received training of varying quality from a variety of agencies contracted by the Ministry of Education.

Each of the PSRLs was highly relevant in establishing key administrative and legislative benchmarks for improvements within the education sector as well as protecting key social sector antipoverty measures from budgetary cuts during the transition period. Highly relevant measures include laying the administrative groundwork for the Rural Education Project, reforming the payroll system, and creating additional transparency within the Ministry of Education budget system.

Regarding the Rural Education Project, project activities are relevant to the sector, especially given the advances achieved under the PSRLs in terms of the creation of school councils, more autonomous regions, and schools. There is, however, a question that the rural project may be doing too much (that is, it is spread too thin across a variety of activities). Some of the elements of the Rural Education Project are being evaluated carefully, using comparison groups. But it does not appear that an evaluation component using learning outcomes data has been built into the overall effort to improve the quality of rural education. A recent progress report on this project shows some major problems, especially the lack of an implementation strategy, an overall monitoring, and an evaluation plan; and a communications strategy aimed mostly at parents, teachers, and administrative personnel linked with the project.

Lessons

Peru's history of progress in primary education is typical of developing countries in some ways and very atypical in others. Peru has reached high levels of incorporating its population into primary education, even in poor rural areas, and rather high completion rates for primary schooling (and secondary school attendance) for marginalized urban and rural youth. This makes it somewhat atypical for a lower-middle-income country. It is also atypical in the financial effort it has expended to accomplish these goals. Peru spends relatively little on its primary education system. Its costs per pupil are among the lowest in Latin America, and its teachers are paid among the lowest salaries in the region relative to per capita income and compared with other public servants.

Peru is typical of countries investing so little per pupil in public primary education (Central American countries, for example) that its students score very low on international achievement tests, both at the primary level (LLECE) and in middle school (PISA), even when adjusted for socioeconomic class differences. Peru is also typical of most developing countries in that the teaching supervision system and teacher and school accountability systems are essentially nonexistent. Finally, Peru shares with most countries a fundamental lack of capacity for managing a massive and highly spread out primary education system. That is one more reason why the quality of these services is so low.

These underlying conditions suggest that improving teacher capacity and the governance of primary (and secondary) education are crucial to improving quality and to increasing efficiently the amount of schooling taken by each student. The Peruvian case suggests that management capacity building, from ministry to school to classroom, should be a priority for governments and for agencies lending for primary education in developing countries.

Development Effectiveness of Bank Support

The Bank strategy under such conditions seems to have been to invest in projects that emphasized successful delivery of educational inputs rather than the delivery of educational outcomes. In the 1996 urban primary education loan, MECEP focused on two inputs—textbook distribution and improved classroom pedagogy. In theory, the delivery of these inputs should produce higher student outcomes, but this is not what the Bank emphasized.

Under programs that emphasize input delivery, managers are considered successful if

they deliver so many repaired buildings and textbooks or train so many teachers. In a Latin American country it should be expected that projects could go to the level of outcomes: delivering textbooks that are used in instruction and changing teacher and management behaviors. It appears that the project took the less-demanding road and focused on the inputs but not on actual textbook use, teacher behavior in the classroom, or learning outcomes.

The Bank's strategy implicitly assumed that if textbooks arrive at the school, teachers and students would use them effectively, and that if teachers learned better teaching techniques, they would utilize them effectively. Although there was slippage in textbook distribution and some teacher corruption in taking commissions from competing publishers to not use the free textbooks, the presence of textbooks and exercise books probably did contribute positively to pupils' learning. But a greater emphasis on the effectiveness of textbook use would have had to include considerable investment in management capacity. Teachers did apparently use at least some of what they learned in the in-service training courses, and, based on teacher interviews, teachers who took the courses considered them valuable. Contract teachers who were not eligible for the courses also wanted very much to take them.

But even though investing in such inputs is a correct strategy, the question is whether without supportive investments in supervision and content knowledge their yield is high enough to justify spending considerable sums on them (particularly the much more expensive pedagogical training part). It does not appear that the yield on pedagogical improvement was very high in the context of teachers' low content knowledge, but an emphasis on outcomes may have forced a more effective investment strategy.

In the Rural Education Loan (2003), the emphasis is also on improvements that emphasize input delivery, such as expanding access to rural education, nonformal preschools run by community implementation agents, and providing direct access to distance secondary education based on programming from a centralized location. Other improvements do, however, emphasize outcomes, such as pilot community incentive programs to improve rural teacher attendance and teacher accountability to local rural communities.

On the Bank's most input delivery-oriented project there was questionably a large amount spent on school construction in the 1990s under pressure from President Fujimori himself. As long as school construction itself is monitored (the Bank claims that the 450 schools' construction that it controlled met specifications), the finished school is the product itself, and it does provide additional or at least improved classroom space for educational activities.

Thus, the Bank seems to invest in input improvements whose delivery alone signals project success, regardless of whether student outcomes increase as a result of such investments. This is a prudent choice for the Bank in a low management-capacity environment, although there exist some serious questions regarding whether because of poor management at the school level, the investments turned out to have relatively low yield in terms of improving student learning significantly. In the long term, educational improvement will depend on the ability of projects to influence management and teacher behaviors and to improve educational outcomes.

With constant changes in ministers, it is admittedly difficult to maintain continuity in reform efforts. The Bank has been fairly successful in Peru despite this difficulty because of the personnel in the local office of the Bank and the fact that the Bank's Education Sector specialist has been in place for 10 years.

Thus, the Bank has been an important part of the institutional memory for reform, and has, by being firm in not changing the shape of its loan agreements once signed, been able to get most of what it wants in the agreement and implementation of the loan. This is not always a good thing, but for the most part, keeping implementation on course has worked reasonably well. All in all, the Bank should be more aware of the longer-term nature of successful educational reforms, particularly in a country in which the educational system requires long-term improvements in quality.

Mali

This case study examines the impact of World Bank assistance to the education sector in Mali from 1990 to 2005. It also examines the ways in which government, donors, NGOs, and civil society have responded to the enormous challenges in the sector. It also suggests a variety of ways in which the support from all actors, and particularly the Bank, can be improved.

Malian children are among the poorest in the world. In 2001, 239 children per 1,000 died before reaching age five; 83 percent of children had anemia. Those children who make it to school are confronted with a system ill suited to their needs. There are not enough chairs, books, pencils, or teachers, let alone more modern teaching materials. For most children, much instruction is in a language they do not understand. Not surprisingly, a very high percentage of children in the Malian school system fail. Repetition rates averaged 19 percent per year in 2002. The pass rate for the sixth-grade primary school exam is about 50 percent; sixth-grade students are frequently incapable of decoding single sentences in their textbooks.

Significant investments over the past 30 years have improved the technical functioning of the sector. Services such as statistics, curriculum development, and in-service teacher education have clearly improved, and there is a healthy policy dialogue about substantive issues such as teacher hiring, public-private partnerships for service delivery, use of national languages, curriculum reform, and textbook policy. However, the basic story of Malian education over the past 30 years is the triumph of form over function, of expansion over quality, of inertia over reform. Neither the government of Mali nor the donors active in the sector have succeeded in bringing either access or achievement to acceptable levels.

The World Bank was very active in Mali during this time, with a total of 78 approved IDA credits. Assistance to education was continuous and can be divided into three distinct approaches: (i) financial assistance, including structural adjustment credits, the Highly Indebted Poor Country (HIPC) Initiative, and Poverty Reduction Support Credits; (ii) education policy initiatives ranging from home-grown policies such as ruralization, the Nouvelle Ecole Fondamentale, and the Programme Décennal de l'Education (PRODEC) to international initiatives such as EFA; and (iii) direct investment in discrete elements such as teachers, curriculum, infrastructure, and textbooks.

Case Study Organization

The study team reviewed progress in quantitative expansion, educational outcomes, and equity (regional, rural/urban, economic, and gender). Data on student achievement were limited, as were data on links between schooling and other outcomes, such as employment, fertility, and productivity.

The team attempted to contact all World Bank staff involved with the Malian education sector since 1990, as well as all ministers of education and ministers from other critical ministries (primarily finance and planning) from the same period. The team met with at least one central-level representative from all critical technical areas, such as textbooks, teacher education, and school construction, and with numerous staff at all decentralized levels. Donor and NGO interview lists were constructed based on interventions during the case study time period. The team also met with members of Parliament, parents' organization representatives, a former leader of the student union movement, other union leaders, and leaders of private school organizations. The case study team visited 18 schools.

World Bank Support for Expanding and Improving Primary Education

Early World Bank support

World Bank lending to the education sector in Mali started in 1973 with support for nonformal education. The Third Education Project in 1984 provided support for the first time to formal education through teacher education for primary school teachers, along with support for nonformal adult programs.

The implementation of the Third Education Project occurred in a difficult economic context (see chapter 2), with the country undergoing a

series of adjustment and stabilization programs. These programs dominated Bank assistance to Mali in the late 1980s and early 1990s. The conditionality that they contained still affects the education sector and is still negatively referred to by Malians. One of the most disliked measures was the "voluntary departure program," through which about 1,000 teachers left the sector, representing about 12.5 percent of the teaching force.

World Bank support from 1990 to 2005

World Bank assistance to the education sector during this period included policy dialogue, analytic work, lending, technical assistance, and capacity building. The Country Assistance Strategies (CAS) of 1994, 1998, and 2003 cite education as a key poverty-alleviation strategy, and there was continued emphasis on policy dialogue and funding for the sector during this time.

The Fourth Education Project (Education Sector Consolidation Project, Cr. 2054-MLI, US$26 million) opened in 1989, followed by the Education Sector Adjustment Project (ESAP, Cr. 2673, US$50 million, 1995), the Learning and Innovation Loan (Cr. 33180, US$3.8 million, 2000), and the Education Sector Investment Program (EdSIP, Cr. 3449, US$45 million).

ESAP (Cr. US$25 million) consisted of an adjustment component of US$3 million and an investment component of US$22 million. The investment component aimed at increasing primary enrollment in three Regions and improving quality nationwide. Enrollment targets were met and classroom construction exceeded targets, but the adjustment component was unsuccessful and two-thirds of the adjustment funding was cancelled. ESAP was a repackaging of the Education Sector Consolidation Project's adjustment conditions. It achieved most of its objectives. Sustainability seemed likely for the less-controversial reforms, but a few, including the ceiling on scholarship expenditures, were reversed prior to the credit closing date.

Concurrently with the implementation of these latter projects, the government of Mali, with Bank assistance, was preparing its 10-year education strategy. During program preparation, the Improving Learning in Primary Schools Learning and Innovation Loan (Cr. 33180, US$3.8 million) was approved. Under this project, the number of *pédagogie convergente* (bilingual) classrooms increased from 300 to 2,056.

In 2000, the EdSIP opened with the support of the Bank and 15 other donors and a total cost of over US$0.5 billion. Activities included: (i) increasing GER from 47 percent in 1997 to 75 percent by 2008 through school construction, preservice teacher education, and increased involvement of communities and the private sector in school financing and management; (ii) improving educational quality by expanding *pédagogie convergente,* increasing expenditure on textbooks and other learning materials, and decentralizing personnel and budget management; and (iii) making the education system more cost effective by hiring public school teachers outside the civil service to reduce wage costs, and redirecting scholarship resources for secondary students toward activities that would improve learning conditions at the secondary school level. The EdSIP started slowly. In March 2004, disbursement was only 45 percent and the credit's closing date was extended from December 2004 to December 2005.

HIPC Initiative and Poverty Reduction Strategy Papers. The Bank's support to the education sector in Mali continued with collaboration of the education and economic teams on the HIPC and PRSP initiatives. Mali became eligible for HIPC in 1999 due to its external debt burden, its vulnerability to external shocks, and its good track record of adjustment. The Poverty Reduction Strategy Paper (PRSP) process began in 1998. The PRSP was to be Mali's medium-term framework for poverty-reduction policies and strategies. Human development, including education, was one of three priority areas. The PRSP is partially financed by HIPC funds, which totaled an estimated FCFA 75 billion in 2002–04. Forty-five percent of this amount was allocated to education and adult literacy.

Contributions from Other Donors to the Education Sector

Many donors have been involved in Mali's education system over the past 15 years, includ-

ing through cofinancing of World Bank-led projects. A range of national and international NGOs have also contributed to sector development, either with their own resources or as implementing agencies for donor programs. Save the Children (United States and the United Kingdom), Care International, World Vision, World Education, and Plan International are the largest NGOs working in Mali. Many smaller NGOs have supported the sector: Santé Sud has built community schools; Paul Gérin Lajoie has supported school management committees; Action Mopti works with schools; and the Groupement des Retraités Educateurs sans Frontières conducts teacher education.

EdSIP

The PRODEC/EdSIP marked a new beginning for coordinated donor financing. Most donors participate today, making donor participation far more coherent and reducing the administrative burden on the government of Mali. Because EdSIP is sufficiently descriptive and includes a clear list of short-term activities, donors can now better direct their support. The program has improved Ministry of Education leadership, although it has not resulted in uniform implementation procedures.

The World Bank's Contribution

In a context where partners have unequal power, it is difficult to separate Bank policy from Malian policy. At times (for instance, with higher education reforms) the Bank influence was so strong that the government of Mali changed its policies even knowing that they could not be implemented. The government was so in need of funding that it imposed reforms until finances were released and then rescinded the reforms. The Bank often guided policy development through the offering and withholding of resources, along with continuous policy advice.

The adjustment projects stressed increasing resources for the education sector, and especially for basic education. The Bank took the lead among donors in policy dialogue with the government of Mali, raising issues such as scholarships, enrollment in upper secondary and higher education, and budget increases and reallocations. Education's current budget as a percentage of the national current budget rose from 20 percent in 1991 to 30 percent in 2005 (MEN 2005) and the budget for basic education as a percentage of the education budget rose from 36 percent in 1993 to 65 percent in 2004 (MEN 2005).

To improve educational quality, the Bank supported teacher education (preservice and professional development), textbooks, and, since 2000, the expansion of *pédagogie convergente.* The Bank has also been a consistent supporter of gender equity in access to education and of decentralization. The case study mission was told that education is now the most decentralized sector in Mali.

The Bank has supported a variety of capacity-building activities since 1990, including training in school mapping, information and communications technology, procurement, budgeting, the use of software for educational planning and modeling, and a variety of technical areas such as curriculum and textbook development. However, capacity as measured by impact on the sector continues to be low. From 1990 until 1998, Bank-financed projects were implemented by the Bureau des Projets Éducation, an independent unit housed in the Ministry of National Education and staffed with civil servants relieved from their usual responsibilities. The suppression of the Bureau in 2001 forced the administration to be more involved in policy dialogue and program implementation.

Efficiency and Sustainability of Changes Supported by the Bank

Bank support had a strong effect on Mali's GER, which increased from 26 percent in 1990 to 71 percent in 2004. The most important activities were the creation of the Basic Education Support Fund (Cr. 2054), the introduction of double-shift teaching, the redeployment of teachers from administrative positions to classroom teaching positions, and the emphasis on the recruitment of contractual teachers. In addition, the Bank's leadership of policy dialogue in the mid 1990s encouraged additional donors to contribute to the sector.

Prior to the beginning of PRODEC, the Bank was minimally involved in educational quality

issues, other than its emphasis on resources for teaching and learning materials and the recruitment of pedagogic advisors. After 1998, the Bank contributed to improving educational quality by financing textbooks, recruiting pedagogic advisors from among experienced teachers, supporting curriculum reform and associated teacher professional development, and supporting the expansion of the bilingual education reform.

The Bank's interventions have not been effective at improving classroom-level conditions or student learning. Investments were made in relevant areas (textbooks, teacher education, and school health), but procurement delays and the focus on the central level rather than the service delivery level have kept them from having a substantial impact. The devolution of funds directly to schools—focusing more attention on the needs of teachers, allowing schools to "contract" for services with local education offices, providing professional development opportunities to teachers and linking them with career and salary advancement—are alternative strategies that might have been more effective.

The efficacy of Bank support was lessened by contradictions in policy recommendations and project-financed activities. Structural adjustment measures reduced the number of teachers in the sector. Contract teacher recruitment was unorganized, and the Bank did not contribute substantially to contract teacher training. These policy contradictions slowed progress in improving educational quality. The Bank pressured the government of Mali to introduce double-shift teaching, which permitted rapid increases in enrollment but decreased instructional time per student, a major factor in student achievement.

In the early 1990s, the Bank pressured the government of Mali to limit access to teacher education to high school graduates, but the reluctance of graduates to enter teaching resulted in the near closure of the teacher education program. The government recruited contract teachers with little preservice teacher education and struggled without Bank support to provide them with short-term training. This decreased salary expenditures, but had a major negative impact on educational quality.

Last, although the Bank financed many textbooks, inefficient distribution and training have kept Malian students from having even one book in each core subject at the end of the case study period.

The education system will be dependent on donor aid for the long term. This was ensured by the government of Mali and Bank policy shift away from low-cost nonformal programs in the 1970s and the continued globalization of the system in the 1990s. The government and donors are pushing the system to an even higher level of dependence, with the attempted computerization of operations at all administrative levels, ongoing purchases of expensive vehicles, and planned technology centers in teacher education institutions. The functioning of some services within the ministry has improved, but none of it will be sustainable without further external support.

The counterfactual is impossible to know fully. If the Bank had not provided resources after the collapse of the Soviet bloc, the economy could have collapsed, resulting in violence and chaos. However, the adjustment program had a very negative and pervasive effect on the opinions of Malians toward the Bank. Perhaps, in the absence of Bank and other donor support, the government of Mali would have been forced to be more effective. More likely, though, the country would have been even poorer and the system even less functional. Based on the results of the case study, the more useful question at this point in the development of the sector is how the Bank can make better choices and provide better support.

Lessons

The story of the World Bank's support to the Mali education sector over the past 15 years is a cautionary tale about the fragility of policy dialogue. It underscores how challenging it is to establish and sustain a partnership whose members are unequal in strength and change frequently. In addition to a number of country-specific lessons, the Mali experience highlights the need for evidence-based dialogue that

incorporates country perspectives while maintaining core principles about the importance of educational quality, equity, and access.

Country-specific policy dialogue in education must receive sustained attention from sector managers, country directors, and regional management. During this period, the Bank was too often dismissive of flawed but promising reform initiatives championed by the government of Mali that could have been the beginning of country-led systemic change. The Bank also did not provide a consistent evidence-based reform argument. It also appeared indifferent to fundamentally important programs managed and negotiated by other donor partners, including most notably the NGO-managed community schools program that was the cornerstone of USAID support through the late 90s and early 2000s.

Support for national languages and preservice teacher education provides further examples of the Bank's inconsistent policy advice. The use of national languages as a medium of instruction was supported by the World Bank in the mid '70s and then dropped until 2000. Similarly, preservice teacher education, initially supported heavily by the Bank, went through a long period of neglect and hostility that resulted in the closing of much of Mali's preservice teacher education program. Only under EdSIP did the Bank begin to rethink its decisive earlier move away from preservice teacher education; no significant reform has yet occurred.

Donor coordination

Ultimately, donor coordination may be less important than donor coherence. Over the past 10 years, donors in Mali have taken advantage of frequent consultations and dialogue to improve the coherence of their interventions. While harmonization of procedures has proven elusive, the increased cooperation among donors has led to a far greater sense of shared purpose and goals among donors and government.

Quality at exit

Much is made of the importance of quality at entry. Similar attention must be given to quality at exit. As projects or programs come to an end, how will policy dialogue be continued? How can children be made less vulnerable to changing priorities? For example, when USAID pulled back from its community school intervention, an absolutely critical program of support in largely rural areas of the country over the past decade, there was little discussion among the donors, including the World Bank, about how to mitigate the potential negative impact among the most marginalized children.

Participation and ownership

The approach used by the Bank and other donors while preparing EdSIP significantly contributed to the development of Mali's capacity in policy design. Malians developed the 10-year education policy largely by themselves, with external funding. The process ended with the presentation and defense of the program to the National Assembly, which was a learning and legitimizing experience for the sector.

Conclusions

The Bank has been a major contributor to educational finance and policy change since 1990. Without its involvement, system expansion would not have occurred as rapidly as it did, and educational policy may have remained incoherent and based on disparate, donor-driven interventions. Nevertheless, the quality of Bank intervention has been inconsistent and has also had negative effects. The Bank has generally been unsuccessful in leveraging its lending program into direct impact on student experiences at the classroom level.

The careful choice of approaches would increase efficiency and improve children's lives. This approach can be based on strong in-country and regional ongoing analytic work; reading of recent, peer-reviewed education literature and studying of successful programs; and using impact analysis, combined with achievement-focused incentive systems for teachers, technicians, and administrators.

Business as usual is unlikely to deliver the breakthroughs needed to reach sector goals. An intensified sector dialogue, widespread adoption of policy initiatives such as the

bilingual education program, and a significant increase in resource availability at the classroom level are the only avenues likely to lead in the medium term to significant change in the Malian educational context.

Romania

Context

Over the last 15 years, two huge events have impacted all dimensions of Romania's economic, political, and social life: the 1989 collapse of communism and of Romania's autarkic regime and Romania's drive to join the European Union (EU).

Economic trends

In the 1990s the government of Romania's commitment to reform, especially to economic reforms such as privatizing the large number of state-owned enterprises, was vacillating and ineffectual. By the end of the 1990s, real GDP was 83 percent of its 1990 level; the total poverty rate had peaked at about 36 percent; and the extreme poverty rate was 14 percent. In response to a greater commitment to economic reform, GDP finally regained and exceeded its 1990 level in 2001. By 2004 per capita income was estimated to have returned to its 1989–1990 level; poverty and extreme poverty had declined; inflation had declined dramatically; the banking sector was on firmer ground; and privatization of state-owned enterprises had accelerated.

Poverty trends

Even by 2002, 3 out of every 10 Romanians were poor and 1 out of 10, extremely poor. At the same time, there is a strong positive association between economic growth and poverty reduction. Several variables predict poverty, but multivariate regressions show that the key correlate of poverty is education; Roma ethnicity and being unemployed are second and third in importance, respectively. Rural residents have more than double the probability of being poor than urban residents, and rural areas account for 67 percent of total poverty. However, controlling for types of primary income earners in the household virtually eliminates the poverty gap between rural and urban households, indicating that rural areas have a greater concentration of households with lower economic potential.

Employment

The dynamics and configuration of employment affect families' demand for education. Since the transition Romania has seen the emergence of three perverse labor market trends: (1) migration of active workers into subsistence agriculture and other low-productivity/low-earnings activities; (2) declining participation in the labor force through retirements, early retirements, and discouraged workers; and (3) flows out of employment and into long-term unemployment.

Romania started the transition with the largest share of employment in low-skill agriculture among the central Eastern European countries, and its employment structure deteriorated in 2001 compared with the distortions observed in 1989. The lack of labor reallocation opportunities in the nonagricultural sectors has turned agriculture into the labor employer of last resort. Natural resources and unskilled labor also dominate (76 percent) the input composition of exports.

Romania's employment structure and the factor intensity of its exports suggests that during the review period Romania straddled two stages of economic growth—factor-driven and investment-driven—and was in a low-skills, low-wage equilibrium. These realities imply a dampening effect on family and business demand for education and on the government's motivations to reform education at least until the late '90s. Moving further into investment-driven growth and innovation-driven growth will accelerate business demand for skills and family demand for education.

Demographic trends

Between 1990 and 2035 the number of basic school-age children is projected to decline from 3.3 million to 1.8 million—a 45 percent decline. However, most of this decline will have occurred by 2005, with the population of basic education age in 2005 being 37 percent less than it was in

1990. Although the basic school-age population is projected to continue to decline until 2030, the downward trend is much more gradual between 2005 and 2030.

EU accession process

Romania applied for EU membership in June 1995; its entry into the EU is scheduled for January 1, 2007. Government policies and actions are driven by the EU accession process, specifically by the EU's *Acquis Communautaire* that is designed to bring new entrants' practices in line with those of EU countries. The *Acquis* does not provide a coherent strategy for social policy issues, including health, education, and poverty reduction. It leaves these issues mostly to the individual countries.

The run-up to accession has consequently "crowded out" the government's attention to a number of areas outside the *Acquis* that are critical for Romania's sustainable development, including education. EU accession poses a significant unfinished education agenda for Romania, as evidenced by the fact that its 15-year-olds performed poorly on an Organisation for Economic Co-operation and Development learning assessment particularly relevant to EU accession. About 70 percent scored below the level that seems required to function in a modern workplace, in contrast to 37 percent of EU 15-year-olds.

National Goals for Basic Education

Romania was among the first Central and Eastern European countries to initiate comprehensive, large-scale education reform. Reform goals included introducing a flexible national curriculum, alternative textbooks, a private textbook publishing industry, the teacher training required to change classroom practice, the head teacher/principal and school inspector training required to institute quality-focused management of the schools, a national assessment and examination service, and rationalized management of the school infrastructure and reducing the quality gap between rural and urban schools.

Commitment to reform varied with the political party in power and the specific minister of education. The period of 1990–1995 was a clarifying phase, with the reform gathering force in the 1995–1999 period. The 2000–2003 period saw some reversal of the reform.

World Bank Support for Expanding and Improving Basic Education

The World Bank started helping Romania reform basic education from early in the transition. The Bank's 1991 sector work showed that that the sector needed a comprehensive approach to reform, with key priorities being pedagogy and curriculum. This analysis led to a tightly connected set of projects: the Education Reform Project, approved in 1994; the School Rehabilitation Project, approved in 1997; a pilot focused on rural schools, funded by reallocating Education Reform Project funds; and a Rural Education Project, approved in 2003.

Summary of Recent Changes in Basic Education in Romania

Several players were involved in Romania's basic education reform during the review period: the Ministry of Education and Research (MER), the Minister of Finance, Parliament, semiautonomous agencies and NGOs, local governments, school staff, parents, and students. They differed in their commitment to the reform and in the "rules of the game" (formal and informal), the organizational infrastructure, and the skills and knowledge that they built to sustain and deepen it. For example, the semiautonomous agencies and NGOs provided the steadiest commitment to the reform and constituted its early technical leadership. Over the review period they built a cadre of professionals competent in curriculum design, educational measurement, teacher development, textbook quality, educational management, and rural education.

However, the MER still betrays a tension between the old concepts of command and control and those of providing policy frameworks and oversight. Accordingly, it still lacks capacities required to function effectively in its evolving role under decentralization: data on sector performance, policy analysis, evaluation, and strategic planning *that are used in policymaking*; a strong financial management

capacity that can give the MER an advantageous seat at the table in Ministry of Finance budget negotiations; and a modern human resource management system.

Basic Education Outputs, Outcomes, and Their Implications for Household Demand

Enrollment and graduation rates for basic education

Romania started the transition with respectable GERs for basic education and has managed to increase them steadily across the review period to about 100 percent. Total net rates are very close to gross rates; graduation rates from eighth grade are solid at about 96 percent but remained relatively flat from 1994–95 to 2003–04.

Enrollment rates vary by individual and household characteristics. Gender has no effect, and moving from the second through the top consumption decile has only a modest effect. Rural residence depresses enrollment rates, but the effect is not large, whereas other variables have significant negative effects: being Roma, being handicapped, being extremely poor or in a household in the lowest consumption decile, having no parent that has attained more than primary education, or coming from a household with a large number of people 0–14 years of age.

Repetition and dropout rates for basic education

Consistent with the Region, Romania's repetition rates for basic education are low, stabilizing at around 3.5 percent. From 1990–91 to 2003–04 dropout rates, defined as the ratio between the difference in the number of students enrolled at the beginning and at the end of the school year, remained at or below 1.5 percent.

Learning outcomes

The 8th-grade (*capacitate*) and 12th-grade (*baccalaureate*) exams, structured to measure the achievement of the curriculum's learning standards by subject and grade, have respectable and relatively stable pass rates: each year about 90 percent pass the *capacitate,* and about 96 percent, the *baccalaureate.*

The international assessments (Third International Mathematics and Science Study [TIMSS] and PISA) show a more negative picture. Romania's eighth graders participated in the TIMSS in 1995 (before the reform), 1999 (the reform was being vigorously implemented), and 2003 (conclusion of the 2000–03 period in which efforts were made to stop or reverse many aspects of the reform). Romania's TIMSS results are virtually flat across the eight years, and Romanian students performed less well in mathematics and science for each of the three rounds than the average for all participating European and Central Asian countries.

It is not clear what the TIMSS series tells us about the reform. Romania's reform could not have started to affect the schools until the curriculum reform started being implemented in the 1998–99 school year. Thus, there was no reason to have expected an effect for the first two rounds of TIMSS. "No effect" can also signal an unevenly or poorly implemented reform. From 2000 to 2003 the MER minister tried to reverse aspects of the curriculum reform, creating confusion at the school level that vitiated or clouded the learning impact of the reform. The problems with in-service training of teachers undercut the planned link between the new curriculum and teachers' actual classroom practices. Finally, international evidence shows that student performance often drops in the first years of a major reform simply because any big reform is inevitably "messy" as teachers and students struggle to grasp its implications.

PISA is especially relevant to Romania's aspirations to join the EU because it measures skills valued in innovation-based economies. European and Central Asian countries generally did not perform well on PISA, but *Romania tested below the Europe and Central Asia Region average and well below the EU average.* Particularly disturbing is that about 70 percent of Romania's 15-year-olds performed below level 3—that is, at levels 0, 1, or 2. *Scoring at level 3 or higher generally seems required to function in a modern workplace.* EU students had double Romania's chance of performing at levels 3–5 (63 percent).

Romania has a substantial amount of work to do if its schools are to create the human capital that Romania needs to compete economically in

the EU and its citizens need to avail themselves of higher wage job opportunities in the EU.

Labor market outcomes

In 2004 the unemployment rates for primary education graduates were relatively low, which may be correlated with the low unemployment rates in rural areas. The most vulnerable to unemployment are those in the middle of the educational attainment distribution, that is, individuals with lower-secondary, some high school, or high school and vocational (secondary or post-secondary) education. However, multiple regression estimates do not yield much evidence that schooling is systematically correlated with the likelihood of unemployment, regardless of age.

The returns to an additional year of schooling across the period 1960–2000 were fairly flat between 1966 and 1989, but they more than doubled between 1989 and 2000. The data are not consistent with standard explanations of this upward trend, such as constrained supply of better-educated workers, product shifts, or skill-biased technical change. Under communism wages were compressed—that is, wages did not reflect variations in human capital. It is possible that the trend since 1990 simply signals the predictable decompression of wages that occurs with the introduction of prices.

Household demand for education

Household demand for basic education is generally high, as evidenced by enrollment rates, graduation rates, dropout rates, and learning performances on the eighth-grade examination. Demand is variable. Being Roma has an independent and highly negative effect on demand, especially in urban areas. Although rural areas have lower enrollment rates than urban areas, it is characteristics of households more prevalent in rural areas, not rural residence itself, that depress demand.

World Bank's Contribution to Sectoral Changes (1990–2004)

The Bank's education lending has been coherent and highly relevant. The relevance of the Bank's work in other sectors that affect education is another story. Every CAS since 1993 has supported education, but the education sector has needed intersectoral attention that thus far has failed to materialize—for example, public administration, public expenditure and financial management, decentralization, labor markets, and rural development.

Relative to the projects' objectives, the Bank's education assistance performed well except for teacher training, a problem that reflected more on the borrower than the Bank. Despite efforts in 2000–03 to reverse the reform, it has had measurable impact on concepts, incentives, and capacities. The Implementation Completion Reports (ICRs) assign solid ratings for outcomes, institutional development, and Bank performance; IEG ratings are consistent with or higher than those assigned by the ICRs. At the same time, the Bank significantly underestimated the magnitude of conceptual changes ("habits of thought") that European and Central Asian countries had to undergo if they were to establish market economies and democracies. The design of the Education Reform Project unfortunately did not include a sustained public relations campaign around its objectives. The concepts behind the reform were alien to players conditioned to a highly centralized command and control system.

Interviews with Romanian counterparts left no doubt that Romania's basic education would not have made the progress achieved in the last 15 years without the consistent support of the Bank. One particular interview revealed the basis for these shared views:

> It was not just the money that was important. If we learned anything, we learned it from the World Bank teams. These teams helped the country understand the concepts behind the project and helped us design and implement the project. This is a major difference between the Bank and other donors. Other donors usually send consultants who do their work and then leave. The World Bank, on the other hand, builds groups of Romanian specialists that can contribute to activities other than World Bank activities. Romania will need the Bank's support even

> after Romania joins the EU. You can't find the World Bank's expertise in the EU. World Bank staff is highly committed and fine specialists…. There are only good lessons from the Bank.

Romania's drive to join the EU raises the question of whether the Bank will continue to have a role in education in Romania. The QAG Country Lending Enhancement Review (World Bank 2004c) concluded, "After accession the social sectors—broadly defined—may be the most important niche for Bank involvement, as the substantial EU resources will be focused on other sectors."

Lessons

- Firmness and flexibility need to be balanced in project negotiations.
- Complexity can advance implementation if the design is coherent.
- The Bank may have a role in sustaining project achievements.
- Creating new partners among NGOs and semi-autonomous agencies builds capacity that tends to be sustained.
- The government of Romania will need to exert more donor coordination, especially for Roma projects.
- Building support for reform is especially needed for projects with long time frames or those that are implemented under decentralization.
- The meso-level is important to successful education reform.

Conclusions

Although the Bank's education team has had a significant and positive effect on Romania's basic education system across the 15 years reviewed, the overall Bank gets a lower grade. Heretofore, the Bank's management has not solved the admittedly difficult "silo" problem that undermines the cross-sectoral collaboration needed to rationalize reforms of Romania's education system.

The failure to include the sector in any completed or planned public expenditure reviews is inexplicable. The MER is struggling ineffectually with the sector's fiscal issues, and neither the government of Romania nor the Bank has grounds for evaluating intersectoral allocations as they affect the education sector. The sector needs help with its fiscal framework for decentralization, but decisions here have to be aligned with a larger decision framework. The lack of a country team/government agreement on a rural strategy undercuts efforts to support rural education and the Roma who live in rural areas. The work on EU integration has done little to pursue the human capital demands of Romania's integration into the Union—for example, rural-urban gaps in educational achievements or the implications of the PISA results.

The cross-sectoral problem is not unique to the Education Sector or to Romania. IEG and QAG have conducted a number of country performance assessments that reveal that the Bank's matrix system is not working well. The country team was expected to create cross-sectoral collaboration around agreed-upon problems that the country needed to solve. It has proved very difficult to make this concept work well.

There is agreement that even after Romania joins the EU, the World Bank has a role in education. Romania has skill-level problems to solve to enable its entry into the Union. It cannot afford to focus solely on the *Acquis*, ignoring factors outside of the *Acquis* that directly affect its chances of solving problems within the *Acquis*. Education is one of those factors. If the Bank's management for Romania chooses to fill the vacuum created by the *Acquis,* the Bank has problems of intersectoral collaboration to solve if it is to help the country address challenges in the education sector.

Response 1: Merilee S. Grindle, Beatrice Okyere, and Paulo Renato Souza

The external panel welcomes this report. The report emphasizes the importance of the Education for All (EFA) agenda established in 1990 and reaffirmed in 2000, as well as the significant place of primary education in the Millennium Development Goals (MDGs) and, more broadly, their importance to the process of development and poverty alleviation. In addition, the report makes very clear that access to education is not sufficient for meeting important goals of equity and fairness in promoting the life chances of the poor, girls, those who live in remote areas, and other disadvantaged groups. Too frequently, access has been promoted at the expense of quality in education. This Independent Evaluation Group report rightly emphasizes the importance of ensuring that children not only attend school, but develop the skills and knowledge base that will allow them to live productive and rewarding lives.

The report appropriately suggests that greater attention needs to be given to improving school outcomes and using outcome measures as centrally important vehicles for determining program success and for making adjustments to projects as they are being implemented. In addition, the report is valuable for its finding that World Bank projects that were focused specifically on education tended to perform better than multisector projects that included education along with other reform activities. It is also important that the report emphasizes the importance of educational management, particularly the need for governments to invest more in the acquisition of pertinent and up-to-date information about schooling in their countries and to use this information more effectively for planning, monitoring, and assessment. The report indicates that project designers need to pay more attention to the inclusion of appropriate management incentives. Additionally, the report focuses attention on the all-too-frequent failure of projects to include appropriate political and institutional analyses as part of planning, monitoring, and assessment processes.

Overall, the report makes a strong statement about the increasing importance of emphasizing the quality of education through project objectives that include important outcome measures. This is an important emphasis, and one that is particularly difficult for many governments and education experts to attend to, given the pressure of achieving the EFA and MDG goals. The report acknowledges the difficulty of promoting quality at the same time that access is being expanded. As the World Bank considers the general recommendation of the report, it must address how access/quality tensions can be effectively managed without sacrificing important equity goals. The report urges the simultaneous pursuit of both goals; the experience of most countries, however, is that this is extraordinarily difficult. Pressures for access strongly tend to crowd out a focus on quality, and, although there is less experience with this, a focus on quality can easily increase inequity in the delivery of education. We strongly urge Bank education specialists to address this issue through research and innovative initiatives.

An issue related to the report's emphasis on quality and outcomes measurement raises another issue that is not directly addressed in the report—that of the time required for reform projects and programs to produce effective results. It may, in fact, take 5–10 years before improvements in the quality of education begin

to be clearly visible. This means that projects and programs may need to be based on longer-term commitments. We strongly urge Bank education specialists to consider if the timing of the Bank's projects is realistic when outcome measures become a more important objective in those projects.

The emphasis in the report on quality, welcomed by this external panel (along with very real concerns about the remaining large gaps in access in a large number of countries, among them the poorest in the world), stresses the importance of outcome measures and school management. At the same time, however, the report provides only brief insights into what most education experts agree are factors central to good-quality education—the teacher and the classroom. Teachers—their recruitment, training, deployment, ongoing professionalization, and representation in the political sphere through their unions and associations—are, in the final analysis, probably as important as factors relating to the efficiency of educational management. The conditions, training, and incentives that affect their performance linked to student achievement should be placed at the center of any project that purports to improve the quality of education. Similarly, curriculum materials, class size, and hours of instruction should be much more central to projects than they appear to have been. We encourage Bank education specialists to focus more attention on efforts to work with teachers and their associations, to facilitate the professionalization of the teaching corps, and to increase that group's ownership of education reform initiatives.

These two concerns—the importance of quality and the centrality of teachers—suggest that the report could argue more forcefully for the importance of increased spending on education. While there are undoubtedly efficiencies that can be achieved in many education systems through better management and use of resources, it is unlikely that such improvements could provide sufficient funding for the infrastructure, salaries, materials, and other inputs into education that are needed. We strongly urge the World Bank to acknowledge the need to increase funding for education if the important goals of the EFA and MDGs are to be reached or even approximated.

Response 2: David Archer

I welcome this evaluation of World Bank investments in primary education but feel that the final report fails to capture some of the significant insights gained from the preparatory work and country studies. Moreover, some of the concerns raised by the external panel over the past 18 months have not been adequately addressed in this final report, which is somewhat too single minded in its focus on learning outcomes.

Clearly, learning outcomes are important—no one will disagree with this. The question is how to operationalize this new focus, and the evaluation gives few orientations for this. Does it mean less attention should be paid to access? The report claims not—asserting that expanding access and improvements in learning outcomes do not have to be traded off against each other—but it is not very strong on this point. I would go further and say they *must not* be traded off. When 100 million of the poorest children remain out of school, shifting our focus from access to outcomes would have serious implications for equity. The report should have paid more attention to the remaining challenges in achieving universal access to primary education.

Part of the concern here comes from a worrying subtext that suggests that measures such as the abolition of user fees are bad ideas because they impact negatively on quality (that is, progress on access has undermined outcomes). This may be the case, but it ignores the fact that education is a fundamental right (embodied in most national constitutions as well as international treaties such as CRC) and that charging children to go to primary school is the most blatant violation of that right. The sooner fees are abolished the better, and this should have been stated simply and clearly rather than urging caution. No single measure has such a dramatic impact on equity within an education system—bringing millions of poor children into school. Rather than questioning the wisdom of governments (or political

leaders) taking such abrupt measures, the emphasis should be on ensuring a rapid response (with coordinated international aid through mechanisms such as the Fast-Track Initiative [FTI]) to situations where fees are abolished so that quality is not affected.

Unfortunately, this evaluation, spanning 16 years, ignores the Bank's own role in the controversial issue of user fees in education. It should have done a more systematic job in scrutinizing the Bank's positions as they have shifted over the period—and it should have been unequivocal in calling for abolition of all costs that prevent poor children from going to school.

There is a danger that the shift of attention to outcomes will be seen as a substitute for much-needed attention to inputs. One effect of this attention on outcomes may be to massively increase investment in testing of pupils (which in itself does not contribute to learning) rather than to focus on inputs that might really improve learning. Most inputs are obvious: ensuring that there are sufficient numbers of well-trained teachers who are teaching classes with manageable numbers, and sufficient books and learning materials in enough classrooms. The report fails to highlight the extent to which the Bank's focus since 1990 has been too narrowly focused on the last of these—infrastructure—often at the expense of other inputs.

Perhaps the biggest omission in this report is in regard to the most important input: teachers. Many of the country evaluations documented the deterioration in teacher quality and teacher conditions in recent years—and the failure of the Bank to pay sufficient attention to this. The call for focusing on quality outcomes should naturally lead to a call for a renewed focus on quality teachers, but it does not. As it is, very little attention is paid in this final report to the critical issues of teacher recruitment, training, retention, or deployment.

Rather, in places the report seems to do the opposite, promoting the hiring of "local teachers" as an effective measure. The Executive Summary says "recruitment of local, often untrained, youth" is one of the "most promising" measures, and elsewhere the "high dedication" of these contract teachers is celebrated. The term "local teachers" that creeps in seems to be an attempt at rebranding para teachers or contract teachers. In fact, the spread of these "non-professional teachers" (a more accurate term) is something that the Bank has actively supported in recent years, often with a very negative impact on learning quality. In the final report there is no analysis of Bank interventions in this area or of how they have sometimes actively undermined the teaching profession. For example, the Mali study documented how the Bank's Voluntary Departure Program led to the loss of 12.5 percent of the teaching workforce (even at a time of expanding enrolments), and the Bank did nothing to stop the closure of teacher education institutions. Instead, the Bank explicitly supported the hiring of unqualified non-public-service teachers and did nothing to support their training. There are many other examples of the Bank promoting non-professionals, and these should have been more closely documented in the final report.

On the positive side, the final report does include a qualifying refrain that calls for more local teachers *"as long as those teachers have access to professional growth opportunities and job security"*—something the Bank has failed to do in the past. It is also good to see the call for more "evaluative research" on contract teaching and to see some of the concerns raised about whether it is cost-effective, equitable, or sustainable in all settings. But if this report is serious in its call for quality learning outcomes, then it should have been much more systematic in looking at the teaching profession and challenging the introduction of unqualified teachers. The moderating clause calling for "professional growth and job security" feels tokenistic in this regard, failing to call for minimum requirements or time-bound processes of qualification. In practice, non-professional teachers are being seen as a long-term cheap labor solution in many countries, and this has a devastating impact on the teaching profession as a whole—undermining status and morale and destroying teacher associations and unions. This is probably the biggest single threat to achieving quality learning outcomes for all children.

It is self-evident that "*what matters in education is what happens in the classroom.*" If the Bank accepts this, then the quality of teachers should be at the center of its attention—that is, unless the Bank is ready to take a dose of its own medicine and start hiring para-economists….

One of the interesting elements in this evaluation is the recognition that decentralization policies and programs seem to have led to "increases in inequities across income and social groups." There also seems to be a new recognition of the need for strong management in central ministries. This certainly warrants further research. Unfortunately, no effort is made to address the evident tensions between these observations and the call for "local teachers." More research is also needed on the impact of private schooling, the spread of which (as inputs to this evaluation have clearly suggested) is undermining equity gains in the public sector (especially in relation to gender inequity). It is time for the Bank to be explicit in its support for public education and to acknowledge that the achievement of education goals will not come through the spreading of private provision.

One underlying problem here is that the Bank has failed to address the contradictions between International Monetary Fund (IMF) macroeconomic prescriptions and achieving education goals—and this final report fails to explore this critical issue. Some of the country studies commissioned for this evaluation showed these contradictions clearly, for example, where the Bank built schools but, because of IMF limits on public sector wages, there were no teachers to teach in the schools (for instance, in Pakistan, Peru, and Mali). The recruitment of non-professionals as cheap labor is presented as unavoidable in situations of increasing enrolment, when new teachers are needed but the government cannot increase its spending on salaries. In fact, there should be more attention paid to why wage bills are capped in the first place.

The country studies done for this evaluation show again and again that Bank investments in education have been undermined by macroeconomic constraints on governments, whether it is the freezing on hiring of teachers in Pakistan or low spending in Peru linked to IMF policies. This fits with the experiences of many other countries (see Marphatia and Archer 2005). Governments cannot even contemplate the "trade-offs" between a rise of one percent in inflation and the recruitment of more teachers, as the inflation target is sacrosanct. The IMF talks openly of the "sacrifice ratio," whereby investments in education and health are sacrificed in the name of macroeconomic stability. It is important for the World Bank to take a stand on these contradictions and to use its influence with the IMF to seek solutions. Building new schools is of little value if governments are at the same time blocked from employing new teachers. The Bank should be championing the benefits of investment in education and helping countries remove the constraints that prevent them from making such a sound investment.

On a related issue, I welcome the recognition in the report that an increased focus on learning outcomes will "raise the unit costs of primary education." There is a call for the FTI "to develop cost and funding gap estimates" that recognize this increased cost. This coincides with the commitment, in Abuja in May 2006, by ministers of finance from 20 African countries to develop ambitious 10-year plans to get all children into school. There is growing momentum here, building on the British government's recent pledge of $15 billion in predictable aid to education. One key element of all this, which the report fails to pick up on, is predictability. In the past, aid to education, including from the Bank, has not been long term or predictable, so it has not been possible for countries to spend the money on what they need: the recurrent costs, particularly teacher salaries, which are the vast bulk of primary education spending. As aid to education becomes more predictable, countries should be able to spend it on recruiting more teachers—but this will be impossible unless wage bill caps and other macroeconomic conditions are removed.

I welcome the considerable attention paid by this report (at least in its recommendations) to

the FTI—but regret that the report fails to call directly for the Bank to put its own money into it! In line with the Paris Aid Effectiveness guidelines, the FTI is an important means for coordinating donor responses to education, and the report should logically call for the Bank to align International Development Association/Poverty Reduction Support Credit funding behind FTI-approved national education plans. Rather, the emphasis is placed on influencing the FTI to include learning outcomes as indicators/benchmarks/targets. As it is, the report does not give sufficient evidence to argue that indicators such as instructional time, teacher attendance, and availability of textbooks are the key ones for improving learning outcomes. The more important reforms of FTI lie in ensuring that it can make long-term commitments (for example, moving beyond the short-term aid of the catalytic fund), that it addresses the full EFA agenda, and that all donors live up to their promises to increase and better coordinate their aid to education.

The country studies show that, despite widespread rhetoric about donor coordination, in practice donors have not been good at this (and the Bank has not helped) and that donor power has often diminished the accountability of governments to their own parliaments/citizens. This needs to change, and this should have been at the center of recommendations from this evaluation.

One reason for the Bank to channel more of its own support through the FTI is that it has not been very successful in allocating money where it is most needed. Since 1990 the most rapid growth in borrowing for primary education has been in East and Central Europe; the greatest volume of borrowing now is in Latin America. But the greatest need is in Africa (where increases have been slow and still fall short) and in South Asia (where commitments are now reducing). Bank support for FTI-approved plans in Africa should be a particular priority.

Unfortunately, from my participation in this external panel, I see an alarming shift in World Bank investment away from primary education—effectively abandoning the MDG agenda. There is an increasing investment in secondary and particularly higher education, and the policy attention to these areas suggests that they will increasingly attract a larger share of the resources from the existing education budget. The focus on the knowledge economy is already attracting significant staff time and resources that would previously have been focused on primary education. Lending to primary education has actually fallen in the period 2000–2004 compared with 1995–1999. Moreover, direct lending to primary education has fallen significantly. It is only lending from other sectors (that include some component of education work) that prevents this decline from being very dramatic and evident. This indirect support for education from other sectors is often very narrowly focused on infrastructure and is likely to have no impact on learning outcomes. The fall in spending on primary education should be explicitly opposed. The achievement of quality universal primary education (UPE) must remain the first and most fundamental priority for the Bank's education work.

Of course the real constraint here lies in the fact that the Bank continues to underinvest in the education sector as a whole. The FTI recommends countries should invest 20 percent of their funding in education (and the Bank widely supports this position) —yet the Bank itself spends just 7 percent of its own budget on education. Why not 20 percent?

An increase in the Bank's spending on education will certainly be needed if it is to respond to learning outcomes—and it would also be essential if the Bank were to take on the full EFA agenda. The World Bank was cosponsor of the Jomtien and Dakar conferences—apparently buying into the EFA framework. Yet a defining part of the Bank's education narrative since 1990 has been a repeatedly reductive focus on UPE—sidelining and ignoring adult literacy and early childhood education. In many documents, including those prepared for this evaluation, UPE and EFA are conflated. This final report should have done more to acknowledge the impact of this, addressing how the Bank's focus on primary education has impacted other

parts of the EFA agenda. It is an unsatisfactory fudge (and a denial of the Bank's power) to say that the Bank's contribution to EFA has been through UPE. This is of particular importance given the widespread evidence of interdependency in the EFA goals. The impact of early childhood education and the home environment on learning outcomes in schools are recurrent themes in the country studies. It is clear that little progress can be made on learning outcomes if we fail to consider the role of early childhood education and adult literacy (which are key to the home environment).

Another key gap in this report concerns HIV/AIDS. It is shocking that most country studies did not raise HIV/AIDS as an issue, despite this being in the terms of reference. The impact of HIV/AIDS on education in the past 15 years is one of the biggest developments in the sector, particularly in Africa. The role that education plays in helping respond to HIV/AIDS is crucial, yet still underregarded. The final evaluation report should, at the very least, make a big issue of the fact that the reports did not touch on HIV/AIDS. There is enough ignoring of HIV/AIDS in the education sector already, without the Bank adding to the deafening silence.

In conclusion, I welcome the fact that the Bank has conducted this evaluation, but I feel that this final report is incomplete. Critical issues do not find enough space, particularly issues around the teaching profession, macroeconomic policies, and the failure of the Bank to target resources where they are most needed. The implications of the call for greater attention to learning outcomes are not made clear enough, and the Bank's past, present, and future global role in basic education is not adequately analyzed. From earlier discussions I gained the impression that this evaluation would call for greater engagement by the Bank with the IMF on questions of fiscal space—so that countries are facilitated in making the long-term investments in education that will yield long-term economic returns. This remains the central challenge in a world increasingly driven by short-term financial planning. But sadly, this has not materialized in the final report. It is a missed opportunity to address the strategic issues that are undermining progress on quality education.

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APPENDIX I: MANAGEMENT RESPONSE

Introduction

Management welcomes this IEG review of World Bank support to primary education. The objectives of the review are to (a) assess World Bank assistance to countries working to improve their basic knowledge and skills base by providing primary education, and (b) provide lessons for countries in their development strategies and for the Bank in its support to those strategies. Early findings of the IEG review have been incorporated into the 2005 *Education Sector Strategy Update.*

Coverage. The evaluation covers the last 42 years, 1963–2005, a period during which lending for primary education amounted to about $14 billion. Nearly 90 percent of Bank lending for primary education has occurred since the beginning of the Education for All (EFA) movement, which started in Jomtien, Thailand, in 1990; and about two-thirds of this lending has been in the form of IDA credits. A growing share, currently about one-third, of primary education lending has been through components of projects managed by sectors other than the Education Sector.

Management Views. Management concurs with the report's conclusion that "to the extent that public investments in primary education are effective in conveying learning outcomes, support for primary education is central to the World Bank's mandate of poverty reduction." Management suggests, however, that the report could have paid greater attention to the extent to which Bank assistance has evolved over time toward a more focused emphasis on results. Over the 40 years of the review period, the World Bank, other donor partners, and the client countries themselves have collectively moved along the continuum from supporting investments in educational infrastructure and educational inputs to increasing education system outputs, improving instructional quality, and raising learning outcomes. While management acknowledges the many challenges that hinder the achievement of higher learning outcomes, it believes that the case studies examined in the IEG review demonstrate that it is addressing the right issues and has made measurable progress in focusing attention on instructional quality and learning outcomes.

Main Findings and Recommendations

The IEG evaluation makes three key recommendations: (a) primary education efforts need to focus on improving learning outcomes, particularly among poor and other disadvantaged children; (b) efforts are urgently needed to improve the performance of sector management in supporting learning outcomes; and (c) the Bank needs to work with its development partners to reorient the Fast-Track Initiative (FTI) to support improved learning outcomes, in parallel with the Millennium Development Goals' emphasis on primary completion. Management agrees with these recommendations. At the same time, to emphasize the evolution of Bank assistance, management would like to highlight several issues for further consideration.

Attention to Learning Quality. Management agrees that Bank assistance and analytic work need to give more consistent attention to learning quality and to the measurement of learning outcomes. On the other hand, management suggests that the report would be strengthened by more clearly acknowledging

how the Education Sector has been moving consistently and systematically in this direction, while remaining cognizant of country ownership of the programs. The report states that "only one in five projects aims to improve learning outcomes." This bold statement does not adequately capture the changing emphasis in the sector. For example, in Latin America in 1990 there were three countries with functioning student assessment systems; by 1999, largely because of World Bank support, 18 countries had functioning assessment systems, and several were carrying out analysis of the results for feedback into instructional quality. Of 24 education projects approved in fiscal year 2006, 17 provided support to improve capacity to measure student learning. In addition, because of the Bank's efforts (through the Development Grant Facility) for the International Association of Education Progress (IEA) and the UNESCO Institute for Statistics, IEA's two assessments—TIMSS (the largest international comparative assessment of student outcomes in mathematics and science) and PIRLS (the internationally recognized leader in studies of reading literacy achievement)—are supporting the participation of low-income countries in their comparative international assessment programs.

Differing Views on Rapid Assessments. The report may overstate the case for low-cost, rapid assessments. There is clearly a need for such assessments as part of a broad toolkit of instruments available to education planners, but it should be clear that the inferences that can be made about an individual's basic knowledge and skill from such an assessment are quite limited. The important point to be kept in mind is that projects aimed at improving student learning outcomes need to invest appropriately in measurement, analysis of results, and use of this analysis to improve quality.

Quality Enhancing Elements in Operations. Finally, the Education Sector has also been increasing its support for quality-enhancing inputs. Of 24 projects approved in fiscal year 2006, 21 included provision for teacher training: the Djibouti School Access and Improvement Project, for instance, will "support (i) training of teachers and (ii) in-service teacher training (upgrading of skill improvements including modules on how to identify and address the problems of children with learning difficulties and/or with special needs)." Eleven of the 24 fiscal year 2006 education projects include elements of school development grants; 12 provide support for research studies on current education issues, and all include management improvement training. Since fiscal 2004 the Africa Region has used the analyses in Country Status Reports—showing the weak relation between learning outcomes and spending—to motivate a whole new work program on improving education management in African countries (known by its French acronym, AGEPA, or Amélioration de la Gestion de l'Education dans les Pays Africains).

Management Action Record	
Major IEG Recommendation	Management Response
Primary education efforts need to focus on improving learning outcomes, particularly among the poor and other disadvantaged children.	Management agrees with IEG's recommendation to ensure that the Bank's primary education assistance, whether led by the Education Sector or not, focuses to an even greater degree on factors directly related to improving learning outcomes. Management will build on ongoing efforts to strengthen or establish learning assessments at the earliest grades and support the use of these tools to set outcome targets, monitor results across different demographic groups, and use the assessment results and other impact evaluations to identify the most cost-effective strategies and interventions to raise learning outcomes. Management will also encourage countries to increase their monitoring of schooling quality standards and unit costs of primary education and to target educational resources so as to reduce disparities in schooling quality standards, instructional quality, and learning outcomes across different groups of students. In addition, management will ensure that education projects not managed by the Education Sector will attend to instructional quality and learning outcomes. The 2005 *Education Sector Strategy Update* (ESSU) incorporated earlier results from this IEG evaluation, which are reflected in the results framework (ESSU Annexes 8 and 9) and specify how Bank assistance will help countries shift to a substantially greater focus on results and learning outcomes. In addition, management will introduce in fiscal year 2007 a Quality Review Framework for education programs to benchmark and report annually on the degree to which lending and analytic activities measure learning outcomes and focus on improving the quality of teaching and learning.
Efforts are urgently needed to improve the performance of sector management in support of learning outcomes.	Management concurs with the need to raise the quality of in-country Education Sector management and capacity, including at decentralized service levels, which Bank research has shown to be critical to improving instructional quality and learning outcomes. Management will build on and further propagate the successful experiences of countries benefiting from Bank assistance that are implementing actions to (a) improve the capacity of the institutions responsible for recruitment and preservice and in-service training of teachers and school principals; (b) provide career development and other incentives for improving teacher performance and introduce better recruitment and career development policies; (c) empower schools to effi-

(*Continued on the following page.*)

Major IEG Recommendation	Management Response
	ciently manage their own resources and pursue agreed targets for learning outcomes; (d) use indicators and evaluation tools to diagnose problems in instructional quality and student learning outcomes; and (e) design interventions to overcome these problems. Management will also monitor and report on whether new results-based Country Assistance Strategies include learning outcome indicators. In addition, management has initiated several activities to implement the 2004 *World Development Report, Making Services Work for Poor People,* including activities to strengthen governance and accountability and analytic work on school-based management. As detailed in the ESSU (Annex 10), management will develop guidelines, toolkits, instruments, and software for capacity building and will carry out targeted training programs to disseminate and help countries use this guidance to strengthen their capacity to systematically measure learning outcomes against baselines and targets, evaluate the impact of their programs and interventions, and focus their resources more effectively on improving instructional quality and educational results. The World Bank Institute education core course was revamped in fiscal 2006 to focus more directly on results and improved service delivery. In fiscal 2007, management will publish and disseminate at least three impact evaluations, a set of guidelines for establishing a system for measuring, reporting on, and utilizing measures of learning outcomes to improve educational quality, and two toolkits for rapid reading assessments and school-based management.
The Bank needs to work with its development partners to reorient the FTI to support improved learning outcomes, in parallel with the MDG emphasis on primary completion.	Management will continue to work with the FTI development partners to help all FTI-endorsed countries strengthen the attention they give to instructional quality in their programs, administer assessment instruments to measure learning outcomes, and use results from student learning assessments to improve instructional quality in all grades. Management agrees with IEG that the major challenge in rapid scale-up is maintaining and improving quality. Management will work with the FTI development partners to revise the FTI assessment guidelines and Indicative Framework to promote the use of additional indicators of fundamental schooling quality standards, such as intended and actual instructional time, presence and use of textbooks or supplementary reading materials, teacher qualification and attendance, minimum physical quality standards,

Major IEG Recommendation	Management Response
	student promotion and dropout rates, and learning outcomes. In fiscal 2007, this will include working with the 20 currently endorsed FTI countries to help them implement a rapid reading assessment, and track implemented (versus intended) hours of instruction. In subsequent years, FTI-endorsed countries would be expected to report trends in learning outcomes against their baseline measures and report hours of instruction as part of the annual joint donor review process.

APPENDIX J: CHAIRMAN'S SUMMARY: COMMITTEE ON DEVELOPMENT EFFECTIVENESS (CODE)

On July 5, 2006, the Committee on Development Effectiveness (CODE) met to discuss the report *From Schooling Access to Learning Outcomes: An Unfinished Agenda—An Evaluation of World Bank Support to Primary Education,* prepared by the Independent Evaluation Group (IEG), and the Draft Management Response. The Statements of the External Advisory Panel (CODE2006-0063) on the IEG report were circulated as a background document.

Background. A World Bank Education Sector Strategy, prepared in 1999, highlighted basic education for the poorest and for girls; early childhood interventions; innovative delivery; and systemic reform. On June 15, 2005, CODE discussed an Update of the 1999 Sector Strategy Paper (*Draft Education Sector Strategy Update (ESSU): Broadening Perspective, Maximizing Our Effectiveness*), which was later endorsed by the Board. It highlighted three strategic themes to help the Bank meet the diverse challenges facing the sector: (a) integrating education into a countrywide perspective; (b) broadening the strategic agenda through a sectorwide approach; and (c) becoming more results-oriented. The updated strategy focused on helping client countries (i) attain the Education for All (EFA) and the Millennium Development Goals (MDGs), and (ii) strengthen education for the knowledge economy, by building higher skills and knowledge needed to compete in global markets and foster economic growth. The report *The World Bank's Assistance to Primary Education—An OED Portfolio Review* was prepared in 2004 as an input into the preparation of the Bank's strategy and circulated for information and as background material for its discussion by CODE. The current report *From Schooling Access to Learning Outcomes: An Unfinished Agenda* is aimed at informing the implementation of the ESSU (2005).

IEG evaluation. The evaluation broadly covers the 1963–2005 period, with an emphasis on the last 15 years, in which lending for primary education amounted to about $14 billion. IEG makes three key recommendations:

- Primary education efforts need to focus on improving learning outcomes, particularly among the poor and other disadvantaged children.
- Efforts are urgently needed to improve the performance of sector management in the countries assisted by the Bank in order to improve learning outcomes.
- The Bank needs to encourage the EFA–Fast-Track Initiative (FTI) to strengthen its focus on raising learning outcomes in parallel with the MDG emphasis on primary completion.

Draft management response. Overall, management welcomes IEG's evaluation and agrees with most IEG recommendations. It suggests, however, that the Bank assistance has evolved over time toward more emphasis on results (education system outputs, instructional quality, learning outcomes). In this vein, management believes the case studies examined in the IEG review demonstrate that the Bank is addressing the right issues, and that the report reflects the trend in Bank support for educational quality and reforms in governance and management to address quality.

Overall conclusions. The Committee broadly endorsed the IEG findings and recommenda-

tions and welcomed management's constructive and forward-looking draft response, noting that the recently approved ESSU focuses on education quality and results. It also appreciated the staff comments on country experiences, and was encouraged by the current innovative works that are undertaken in the Regions to enhance the focus on quality and learning outcomes. There was broad agreement on the importance of learning outcomes, while equal access, particularly for girls and other disadvantaged children, remained relevant. In this regard, members took note of IEG's recommendations to encourage EFA-FTI to strengthen its focus on improving learning outcomes and universal completion in its partner countries. They commented on the challenges ahead to achieve the MDG calling for universal completion of primary education by 2015.

Overall, there was support for taking a more comprehensive approach to education, as emphasized in the ESSU. Such approach would include greater integration of multisectoral factors affecting school attendance and learning such as infrastructure (that is, the roads, electricity, transportation) and student health and nutrition, as well as more attention to post-primary options (that is, vocational and technical education), and links to the labor market and demand for skills in a knowledge economy. Members noted the need to further strengthen Bank support to improve education sector management and governance, while understanding the country political and institutional dimensions. Other comments related to the high number of primary education initiatives supported through multisectoral projects, including development policy lending (DPL) and sectorwide approaches (SWAps); availability of financial and human resources; private sector participation; the role of teachers; and measurement and results in the education sector. The issue of communication and dissemination of the IEG report, the opinions of the External Advisory Panel and the draft management response were also addressed. In this regard, the need to externally communicate balanced messages emerging from the IEG report to avoid misinterpretations was underlined.

Next steps. Management will introduce in fiscal year 2007 a Quality Review Framework for education programs and report annually on the degree to which lending and analytic activities measure school outcomes. It will also publish and disseminate at least three impact evaluations, a set of guidelines for establishing a system for measuring and reporting on learning outcomes, and two toolkits for rapid reading assessments and school-based management. The Bank and its FTI development partners will continue working with the 20 currently endorsed FTI countries to help them implement a rapid reading assessment and track implemented hours of instruction.

Members raised the following issues during the meeting:

General comments. Speakers welcomed the different perspectives of the External Advisory Panel. Although a few speakers commented on the timing of the IEG report in relation to the Bank's ESSU, it was also noted that earlier versions of the report had been shared and discussed with Bank staff, which served as an instrumental input to the ESSU. One member asked about the budget implications of implementing the IEG recommendations. Others felt the evaluation report could have had more detailed analysis of different approaches to improve primary education, structured according to different categories of countries, for example, low-income and middle-income countries, or in urban and rural areas. IEG commented that the report gives broad suggestions on the kinds of intervention needed for countries at different levels of development but suggests that solutions must be customized to meet unique country conditions.

Overall support for primary education. Several members noted that some countries are currently halfway on the road to achieving the MDGs. They urged the international community to accelerate progress to reach the universal completion of primary education by 2015. Management reiterated its support to the achievement of the MDGs. Some members noted the shortfall in financial resources, includ-

ing for the EFA-FTI, to support the achievement of the MDG in primary education. Some speakers also noted the need to consider the private sector role, fiscal space for education, and sustainability issues in the long term. The importance of coordination and partnership with other donors was emphasized.

Expanding access and strengthening learning outcomes. The Committee discussion also addressed the complementary nature of education access and quality and the challenges of doing both. Members strongly emphasized the importance of ensuring quality education for all children. At the same time, a few speakers commented on potential tradeoffs between education access and quality, and proposed more research on how to address access/quality tensions; one member cautioned against a wholesale shift away from equity of access. Some speakers observed that expanding access and improving quality will require increased unit costs in reaching EFA goals in country programs supported by the Bank. Others asked about the timing and sequencing to provide education support. In the opinion of one member, costly tradeoffs, while scaling up outcomes, could be avoided through scaling up resources and improving efficiency. Another member commented that it was too early to assess the impact of ESSU on project design and implementation including increased attention to learning outcomes. One member felt that key factors to good quality education such as the classroom (more precisely, what happens in the classroom—school books, other learning materials, incentives for pedagogic innovation, etc.) need to be better analyzed and addressed.

Education sector management. A number of speakers emphasized the important role of teachers in improving education quality and the need to consider teachers' training, accreditation, and performance incentives. A member thought that the IEG report could have provided more analysis of performance of teachers, both regular and contract. IEG commented that the report includes references to adequate teacher supply and incentives and issues regarding the sustainability of contract teachers. A few members stressed that the Bank's interventions should be focused on institutional reform, particularly on the reform of labor market for public school teachers. At a broader level, some members noted that more efforts were needed to enhance countries' sector management and governance through DPL and SWAps, while recognizing the challenges associated with cultural, institutional, and political dimensions. Other speakers also noted the importance of data and assessment tools for decision making and strong ownership for reforms. A few questions were asked about the effects of decentralization on education management and the fragmentation of education management capacity building in Africa.

Bank operations. Several speakers noted the growing share of lending for primary education through multisectoral projects. One member welcomed this trend, while others asked whether there were any differences in learning outcomes of education components in multisectoral projects compared to single-sector education projects. IEG commented that it was too early to assess differences in terms of learning outcomes, and moreover, very few such components had learning outcomes as primary objectives. A member was interested in the impact of Bank support in the form of recurrent financing for primary education, while another member noted the risk of aid dependence.

Pietro Veglio
Chairman

ENDNOTES

Chapter 1

1. See, for example, the reviews by Lockheed and Verspoor (1991) and Schultz (1993) on the returns to women's education. Primary schooling is also associated with higher knowledge of HIV/AIDS and increased condom use, compared with people with no schooling (Deheneffe, Carael, and Noumbissi 1998, Filmer 1998). For a review of the rationale for public investment in primary education, see Boissiere (2004a).

2. Many studies examining the relationship between primary education and economic growth (micro and macro) have used years of education attained (*educational attainment*) as the education variable and have come up with few unequivocal findings (Pritchett 2001; Harmon, Oosterbeek, and Walker 2000; Venniker 2001). More robust connections have been found when primary education has been measured in terms of knowledge and skills acquired. Glewwe (2002) showed high private returns to cognitive skills (literacy and numeracy). Hanushek and Kimo (2000) conducted a cross-national study with the Third International Mathematics and Science Study (TIMSS) and found strong connections between learning and economic growth. Likewise, Coloumbe and others (2004) found a strong relationship between levels of literacy in the labor force and economic growth across 16 Organisation for Economic Cooperation and Development (OECD) countries (now being extended to less-developed countries). For more details see Boissiere (2004a).

3. Data from the OECD Development Assistance Committee indicate how Bank support compares with that of other development agencies; however, Committee records only cover *basic education*—a heading that includes mostly primary education but other subsectors as well (see box 1.2). In 2003 a total of $2,412 million was committed globally by donors for basic education, of which $1,429 million was bilateral assistance and the balance multilateral. International Development Association (IDA) credits were the single largest source of funding for basic education that year. International Bank for Reconstruction and Development (IBRD) lending was not counted, but if it had been, the Bank's share would have been even higher. As with the World Bank, many bilateral development agencies also showed increases in the share of their aid going to basic education since 1990, but over most of the period the overall bilateral funding commitments to education were on a downward trend (UNESCO 2004).

4. There is also significant inequity in educational achievement. On the United Nations Educational, Scientific, and Cultural Organization (UNESCO)–sponsored Latin American Laboratory for Assessment of Quality of Education (LLECE) exam in Latin America, all participating countries except Cuba showed significantly lower literacy scores for children of parents with few compared with more years of education. For example, in Peru the average score for children of parents having only 3 years of education was around 220, and that for those with parents having 14 years was about 260 (the range of group averages on the test across all participating counties went from 220 to 350).

5. The evolution of World Bank policies on primary education is summarized in Appendix A.

6. "These needs comprise both essential learning tools (such as literacy, oral expression, numeracy, and problem solving) and the basic learning content, (such as knowledge, skills, values, and attitudes)" (Secretariate of the International Consultative Forum on World Declaration on Education for All 1990, Article I).

7. World Declaration on Education for All (1990), Article IV.

8. Although it is titled *Education for All—Fast-Track Initiative,* the FTI focuses on completion and not specifically on learning.

9. The proposals from participating countries are mainly intended to be financed directly by donors, rather than from a centralized FTI fund. However, the FTI does dispose of a "Catalytic Fund" designed to temporarily assist countries having solid plans but little current donor agency support. It is assumed that the performance using this temporary funding source will attract new donors to continue the assistance. In addition, FTI has created a small Education Program Development Fund to assist countries in their attempts to create solid and fundable education plans. The FTI has been recognized as an effective mechanism for encouraging country ownership of external assistance agendas and donor agency cooperation and (sometimes) harmonization.

10. *Education for All—Fast-Track Initiative: Framework* (2004). These benchmarks include more than a dozen targets based on empirical analysis of a set of low-income countries that are "on track" to achieve primary school completion—such as a 20 percent share for education in the government recurrent budget, a 42–64 percent share for primary education in the education budget, a pupil:teacher ratio of 40:1, an annual teacher salary equal to 3.5 times gross domestic product (GDP) per capita, and one-third of primary education recurrent spending for items other than teacher remuneration. However, Bruns, Mingat, and Rakotamalala (2003), whose work informed these targets, note that they "should not be applied rigidly" (see Appendix E).

11. As of January 2006, 20 countries had joined the FTI: Burkina Faso, Djibouti, Ethiopia, The Gambia, Ghana, Guinea, Guyana, Honduras, Kenya, Lesotho, Madagascar, Mauritania, Moldova, Mozambique, Nicaragua, Niger, Tajikistan, Timor-Leste, Vietnam, and the Republic of Yemen. It is expected that 40 countries will be receiving FTI support by the end of 2007 (World Bank 2006).

12. This report sometime uses *universal access* synonymously with *universal enrollment/completion.*

13. While there have been studies on the relationship between primary education outputs and welfare and employment outcomes in many countries (see, for example, IEG 2004d), very few Bank-supported primary education programs and projects included these as objectives, so this part of the results chain was not covered in the evaluation.

14. Whereas the current evaluation is mainly oriented toward results of Bank assistance, the Joint Evaluation was more focused on processes of external assistance (client ownership, the trade-offs between project and program support, donor harmonization, and so forth). Because the Bank was a participant in that evaluation, such processes are not highlighted in this study.

Chapter 2

1. For a complete list of all projects covering primary education approved between fiscal 1963 and 2005, by country, see Appendix D.

2. The number of projects approved in 2005 (70) was higher than in fiscal 2004 (54) and well above the annual average (45) for fiscal 2000–04. New commitments in fiscal 2005 ($818 million) were substantially lower than in fiscal 2004 ($1.04 billion), albeit slightly higher than the annual average for fiscal 2000–04 (about $800 million per year).

3. In nominal dollar commitments; in 2003 constant dollars, the increase was 82 percent.

4. Primary education also has risen dramatically as a share of total World Bank education commitments, from 20 percent before 1990 to 43 percent during the 1990s and 53 percent in 2000–04 (IEG 2004d)

5. Investment lending has a long-term focus (5–10 years) and finances goods, works, and services, such as improvements in physical and social infrastructure, and sector-specific inputs, such as learning materials and training. Development policy lending has a short-term focus (1–3 years) and provides quick-disbursing financing to support policy and institutional reforms.

6. Of the 68 projects managed by the Education Sector for fiscal 2000–04 with any commitments for primary education, only two were sector adjustment-type projects. Sixty percent were standard investment-type operations, 29 percent were adaptable program lending, and the remainder consisted of learning and innovation lending, or emergency lending. Thus, within the sector there has not been a shift to adjustment/development policy lending.

7. A PRSC is a recently developed World Bank funding instrument that provides budget support to countries for poverty-reduction efforts in a multisectoral package, usually based on a country-led PRSP, which is vetted by the Bank.

8. More than three-quarters of the 70 projects approved in fiscal 2005 with any primary education expenditure were managed by other sectors. Of the

share of primary education commitments managed by other sectors (53.5 percent), 26.4 percentage points were for development policy lending (including PRSCs), 10.9 percent for social fund/community-driven development investment projects, 9.0 percent for other investment projects, and 7.2 percent for emergency projects.

9. The average primary education commitments per project managed by other sectors has remained stable over time: $8.0 million prior to 1990 (there were only six such projects), $7.3 million in 1990–95, $8.7 million in 1995–99, and $8.2 million in 2000–04. Among projects managed by the Education Sector, the average commitment to primary education per project prior to 1990 was only $9.4 million (174 projects). This jumped to $55.2 million per project for 1990–94, $46.9 million for 1995–99, and $40.1 million in 2000–04.

10. The Education Sector has reviewed the disbursements to Ministries of Education (in some instances explicitly for primary education) by the roughly two dozen projects in the Africa Multi-Country AIDS Program, which are managed by other sectors (Bakilana and others 2005). Disbursements to ministries were low—only about $4.4 million, or 2.1 percent of total disbursements by the end of fiscal 2004, among the 13 projects effective in fiscal 2001–02 (Bakilana and others 2005, table 2). Factors that have contributed to low disbursements for education activities and that presumably would also affect their efficacy include lack of recognition by AIDS and health authorities of the importance of the education sector; lack of commitment and capacity by ministry officials to fight AIDS; the limited engagement of education specialists in preparation or supervision of the multisectoral projects; and the lack of an implementation plan for education activities prior to project effectiveness.

11. In a recent policy change (mid-2006), PRSCs are not to be fully evaluated until a series has been completed.

12. Accepting and fulfilling these conditions was not without controversy in many places. The decision to increase allocations to primary education was often accompanied by agreements to cut scholarships for upper secondary and higher education students, based on data that show that elites were receiving a disproportionate share of educational benefits. Such moves led to protests and student unrest in places such as Ghana, Mali, and Niger. A concern for possible imbalances across the subsectors in some places has led the Education Sector in its 2005 sector strategy update to press for more of a systemwide approach to planning development assistance in education at the country level.

13. The proportion on ongoing projects that plan to use learning outcomes as performance indicators is about 80 percent, but this proportion should be viewed with caution. It is not clear how many of these projects have solid assessment designs, including good benchmark data. Also, IEG has reported that among completed projects specifying learning outcomes as indicators, 35 percent never followed through with their planned assessments (IEG 2004d).

14. As shown in the portfolio review for this evaluation, the share of projects with a female education feature rose from 20 to more than 40 percent over the period from before 1990 to 2004 (IEG 2004d, p. 16). Increases were particularly strong in South Asia from before 1990 to 1995 and in Sub-Saharan Africa between 1990 and 1994 and 1995 and 2000. Among the most recently approved projects (since 2000), more than 85 percent of those in Africa and South Asia address female education, while in the other Regions (some of which have already attained or nearly attained gender parity) the share is half or less. Chapter 3 indicates how successful recent projects have been in closing gender gaps.

15. Reduced repetition and dropout rates—even without any expansion of enrollment, improved quality, or learning outcomes—would result in higher rates of completion of primary school.

16. This includes all primary education projects approved from July 1, 2004, through May 23, 2006, and managed by the Education Sector, with the exception of two that were emergency rehabilitation projects.

17. Ten such projects were examined in detail. Five were randomly selected from among Education Sector adjustment projects spending at least half of their funding on primary education, and the other five were purposively selected from among projects managed by other sectors that have the highest percentages of funding committed to primary education. See IEG (2004d) for an explanation of the sampling procedure.

18. See Boissiere (2004a) for a review of current literature on the determinants of educational outcomes.

19. The World Bank coined the term *economic and sector work* (ESW) to refer to its analytical reports and policy notes. Recently, however, that phrase has been

superseded by the term *analytic and advisory activities*, which refers to analytical work and policy notes plus conferences, workshops, policy dialogue, and technical assistance. As this report only covers analytical work and policy notes, it will use the older term, ESW, or simply analytic work. The Bank also conducts research, some relevant to primary education, within its Development Economics Vice Presidency. According to information provided by the Research Committee Secretariat, from 1992 to 2005 the World Bank research support budget financed roughly 32 research projects related to primary education, amounting to $2.69 million (excluding the time of World Bank research staff). Because the Education Sector does not count this research among its reported analytic work, it is not covered here.

20. These included an evaluation of Brazil's Bolsa Escola program (fiscal 2000), an evaluation of India's District Primary Education Project (DPEP, fiscal 2003), and a Vietnam report on learning outcomes among fifth-grade students in math and Vietnamese.

21. These include a policy note, "Determinants of Learning in Mexico," and reviews of educational achievement in the Caribbean and in Central America.

22. Even this misses much analytic work, as an increasing amount is now being financed through lending programs and is embedded within them.

23. *Outcome* is defined as "the extent to which the project's major relevant objectives were achieved, or are expected to be achieved, efficiently." An outcome has three components: relevance, efficacy, and efficiency. The relevance of objectives is the "extent to which the project's objectives are consistent with the country's current development priorities and with current Bank country and sectoral assistance strategies and corporate goals." Efficacy is defined as the "extent to which the project's objectives were achieved, or are expected to be achieved, taking into account their relative importance." Efficiency is the "extent to which the project achieved, or is expected to achieve, a return higher than the opportunity cost of capital and benefits at least cost compared with alternatives." *Sustainability* is defined as the "resilience to risk of net benefits flows over time—taking into account factors such as technical resilience, financial resilience, social support, government ownership, and institutional support." *Institutional development impact* is the "extent to which a project improves the ability of a country or region to make more efficient, equitable and sustainable use of its human, financial, and natural resources."

24. No projects approved after 1999 had been completed as of the end of fiscal 2004.

Chapter 3

1. Hanushek (2005) shows that schooling effects on learning outcomes are stronger in developing countries than in higher-income countries, where social status factors are more important. But in addition to schooling variables there are many other factors at play, including family background, health and nutrition, and demands for skills in the labor force.

2. The Peru case study indicates that the school construction/renovation done in the project eventually may have been undertaken by the government with its own funds, but the Primary Education Project considerably increased the speed at which the renovations were done.

3. This is in Uttar Pradesh, where 45,000 contract teachers were hired in 2004 alone.

4. In Ghana, the proportion increased from 50 to 80 percent from 1980 to the mid-1990s, but since then it has fallen again, largely because of the rapid growth of private schools, whose teachers are generally less well trained.

5. The Republic of Yemen has been an exception. Arrangements were made for classrooms constructed under public works and social funds projects to be provided with adequate numbers of textbooks and trained teachers (World Bank 2003a).

6. The PRSPs in Uganda are exceptional in that at least one of them was task managed by an Education Sector specialist. This is one plausible explanation for the inclusion of learning outcomes in the Uganda PRSCs.

7. This lack of attention to learning results can produce a system that thinks it is producing educated children when it is not. This is epitomized by Niger, where those merely enrolled in school are labeled *scolarisés* (schooled), regardless of whether they can read or write (IEG 2005d).

8. See PPARs in Niger (IEG 2005d) and Uganda (IEG 2004c) and the case study on Mali. The pattern in Niger is typical. Classes having enrollments above 70 were split into morning and afternoon sessions, taught by the same teacher, with additional instruction given on Saturday. In this way, each child gets about 40 percent less scheduled time than in a regular classroom.

9. Demand factors are also at play with respect to learning outcomes. The case studies for Romania and Peru both show how the low-skills-low-wage equilibrium in the labor force is placing few demands on the school system for improved skills. This is something the Bank and its partners could deal with in the future through more cross-sectoral research and planning.

10. Other strategies used by the government (but not funded by the Bank) to increase enrollment and attendance were a midday meal scheme, covering all students, and free textbooks, uniforms, and scholarships for girls and low-caste/tribal people. While all of them appear to have had some effect, the midday meal program was found to be the most effective of all demand-side programs in motivating both enrollment and daily attendance (World Bank 2004e).

11. The fourth target of the Millennium Declaration was to "eliminate gender disparity in primary and secondary education, preferably by 2005, and to all levels of education by 2015." Much progress was made before the 2005 target date, with many areas of the world achieving gender parity in primary education by the target date; however, South Asia, the Middle East and North Africa, and Sub-Saharan Africa continue to have ratios of girls' to boys' enrollment below 90. These regions did not achieve gender parity in primary education by 2005 and may not even do so by the 2015 deadline (World Bank 2004g).

12. According to World Bank data, the Republic of Yemen's GER for girls increased to 72 percent in 2004, but that for boys also increased (to 102). The gender gap in 2004 stood at 30, little changed from that of 2000, when it was 34.

13. In Mexico, access was not an issue. In Uruguay, which also has near universal enrollment in primary education, the Bank supported a project to expand access to pre-primary education for the poor.

14. This low attention to the distribution of learning outcomes across socioeconomic groups continues in the most recent Education Sector projects. Of the 23 primary education projects approved in fiscal 2005 and 2006, none had an explicit objective of improving learning outcomes for the poor as a group, although a few did target learning outcomes improvement among children living in poor areas.

15. Four of the evaluation's field-based study countries—Honduras, Niger, Vietnam, and the Republic of Yemen—have become FTI partners. All of them have put forward proposals to reach a primary completion rate of 100 percent by 2015 and estimated the funding needed to reach that goal plus to close current funding gaps. In Niger, the poorest of the four, only 23.7 percent of students "attained" grade 6 in 2001, implying a huge expansion effort. Yet in 2000 only about 54 percent of the few children who did graduate reported that they could read easily, and various national assessments showed very weak language and math achievement. The new 10-year plan does include curricular revision, teacher training, and better textbook provision, but does not include any learning improvement target. The perception that expansion has overwhelmed learning goals is reinforced by the fact that in the 2003 PRSC progress report enrollment indicators were tracked, but there was no mention of extremely weak learning outcomes.

16. The four projects effectively supporting learning outcomes gains were Chile: Primary Education Improvement Project (1991); India: District Primary Education Project II (1996); Mexico: Second Primary Education Project (1994); and Uruguay: Basic Education Quality Improvement Project (1994). The projects from India and Uruguay were examined by IEG in the field (PPARs).

17. Most of these projects focused on determinants of student learning (inputs and processes) such as revised curriculum, improved textbooks and textbook distribution, teacher training (in-service and preservice), community involvement, and improved supervision. Learning outcomes were used as performance indicators in about a third of these projects. A larger proportion of ongoing primary education projects (about 80 percent) have plans to do so, but past experience shows that such plans are often not carried out. Also, IEG could not verify whether the planned learning assessments were appropriately designed (had a baseline and adequate measurement methods).

18. Among those projects without learning outcomes indicators, most proposed to develop new measures. While doing so is important for the ability to monitor the impact of future primary education investments, it means that "baseline" will likely take place well into the project, reducing the likelihood of repeated tracking during the project's lifetime. Another option would be to establish a simple baseline by project start-up to be bolstered by more complete measures later on.

19. Based on the national NGO Pratham's *Annual Status of Education Report, 2005*, released in early

2006 and based on household surveys in 485 rural districts throughout India.

20. In rapidly expanding school systems, declines in average achievement levels do not necessarily indicate falling individual performance levels. Instead, such levels may be more a reflection of the relatively low school readiness of the new learners, who will mostly be from disadvantaged backgrounds (for example, having nonliterate parents and poor learning conditions at home). During periods of rapid expansion, educational service delivery would have to be improved even to maintain learning outcomes at previous levels.

21. This term has been used by Ayyar and Bashir (2004) to refer to processes of curricular reform, textbook revision, teacher training, and improved supervision, based on a paradigm of student-centered learning and a focus on learning outcomes.

22. This is clearly not a full-blown model or an exhaustive set of stages. It is simply an example of how different kinds of treatments are relevant to countries at different stages of development.

23. Bank support in Uganda did influence better resource planning and the accelerated provision of inputs during the rapid expansion period; had it not been for Bank support, the situation would have been much worse. Also, it is not clear how much of the decline is due to deterioration of learning conditions and how much to the characteristics of the newly enrolled.

24. In Vietnam, in response to a public expenditure review conducted in 2000 showing a high degree of inequity in resources spent on education and consequent variations in student enrollment and achievement, the government established a policy and program (supported by the Bank and others) to make sure that all schools, even the most remote, are equipped to meet the country's basic "fundamental school quality level" standards (World Bank 2003e).

25. Unfortunately, project evaluators only conducted univariate analyses in presenting their outcomes and thus did not assess the differential impact of the various interventions provided. The 2001 PPAR recommended the future use of more advanced statistical techniques in showing the impact of government interventions (IEG 2001).

Chapter 4

1. Even though the Bank's 1999 *Education Sector Strategy* paper's treatment of decentralization is descriptive and neutral ("Central governments around the world have decentralized education management to varying degrees—and with different ends in mind…") and provides no evidence for its impact on improved educational outcomes for the poor, the paper does end up listing decentralization as one of its preferred "policy directions" (World Bank 1999).

2 . The 2004 Punjab Sector Reform Project has clarified much of this for the province.

3. This is the "short route" of accountability described in the *World Development Report 2004,* in which client power is applied directly to the frontline service providers (schools and teachers) (World Bank 2003d).

4. This study controlled for the decision as to whether a child enrolled in an EDUCO or traditional school ("participation characteristics"). Unfortunately, because of data limitations, the authors were unable to take into account the decision on whether to enroll a child in any school.

5. However, children attending EDUCO schools come from more disadvantaged backgrounds. Thus, the unconditional mean test scores for children attending EDUCO schools are lower than for children in traditional schools (though the differences are not statistically significant).

6. In the state of Rajastan in 1995–96, 32 inspection officers were listed for 3,680 schools. In 1999–2000 the number of schools had expanded to 4,124 but the number of supervisors had fallen to 31 (Clarke and Jha 2006). The government of India's ambitious DPEP established local and block (subdistrict) resource centers, which included (ideally) monthly school visits by mentors. However, as these were not connected to the official teacher management systems in any way (teacher promotions, transfers, pensions, and so forth), they have had less influence over certain aspects of teacher professional growth than the supervision system. The two systems have tended to exist in parallel. Innovation under DPEP also includes school oversight by village education committees, which might have been expected to improve education quality. In practice, they have been much more active in overseeing the quality of buildings and grounds than the quality of instruction, in which they have felt reluctant and unqualified to intervene.

7. A recent review of teacher incentives in Latin America shows that rewards to teachers are rarely based on any measure of performance (Vegas 2005).

8. In India, where locally appointed teachers are used in many states, some states are more proactive

than others in designing career tracks for locally hired teachers (personal communication, Prema Clarke).

9. It is assumed that project managers need outcome evaluation to help guide them toward improvements in program and project results (see Kusek and Rist 2004).

10. The QAG results pertain to education projects in general, not just those containing primary education features. To assess "quality at entry" (QAE) QAG took a random sample of new projects—50 in all (roughly 20 percent of all projects), stratified by region and network. QEA5 included projects approved by the Bank in fiscal 2002; "education projects" were those managed by the Education Sector. Ratings were based on a review of project design documents and interviews of relevant staff members. Given the relatively small number of projects in one QAE round, regional and sectoral trends were determined using combined QAE scores from QEA3 (calendar year 1999), QAE4 (January 2000–June 2001), and QAE5 (fiscal 2002). In five other sectors the rating on evaluating impact/outcomes was as low or lower than in the education sector; in three the rating was higher.

11. The use of outcome indicators was even less prevalent in the projects in other sectors with primary education components. Of those, only two proposed the use of outcome measures.

12. According to the 2005 *Education Sector Strategy Update,* all new education lending projects in the Latin America and Caribbean Region will have built-in impact evaluations (World Bank 2005b).

13. In the primary education portfolio review analysis, 11 primary school projects were found to have plans for outcomes evaluation. Only 7 of them actually implemented these plans. In contrast, all but one of the 25 projects planning evaluation of outputs implemented their plans. (See IEG 2004c, box 4.)

Appendix B

1. Following Education Sector practices, the evaluation assumed that half of commitments to "general education" were for primary education. In total, 730 projects having some allocation to primary education were counted; of those, 198 projects committed at least 50 percent of funding to primary education (referred to in the evaluation as "primary education projects").

2. IEG ratings based on Implementation Completion Reports (ICRs) give a single outcome rating for the entire project. The evaluation team used project documents to create a rating for each project objective.

Appendix F

1. The Ghana case study was conducted as one of a series of World Bank/Department for International Development "impact studies."

2. As of 2003 there were 56 of these.

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