

TERMS OF REFERENCE

FWC COM 2007 LOT 4

Desk Study on Expenditure on Education in Developing Countries

1. BACKGROUND INFORMATION

The Commission education policy calls for a balanced approach to education financing. However, the notion of a 'balanced' approach means different things in the different countries with which the Commission has development cooperation relations. In practice, the development of the various sub-sectors has tended to be uneven leading to increased access in some sectors and to bottlenecks and under-provision in others. For example, it is possible that pressure to be seen to be making progress on the MDGs has resulted in primary education receiving the bulk of both domestic education spending and donor allocations while funding for secondary schools, technical and vocational training and tertiary education as well as early childhood development has tended to lag significantly.

2. OBJECTIVES OF THE STUDY

The study is aimed at having better information on which to draw conclusions regarding appropriately balanced inter-sectoral allocations for a range of country contexts. This analysis will assist in making more accurate and better calculations of the financing gap that many countries experience between the available domestic resources and the volume of resources needed to achieve universal primary completion whilst maintaining a balanced education sector.

3. ISSUES TO BE STUDIED

The study will collect information on both the current situation of intra-sectoral allocations to the various sub-sectors of education in developing countries and on recent trends. It will relate these financial commitments to trends in education outcomes in the countries studied. It will analyse (in selected countries) the accompanying decision-making processes, including the extent to which educational services are provided by the private sector or by other non-governmental agencies.

4. SCOPE OF THE STUDY

At this stage it is proposed to launch a study with limited scope, firstly to develop and test the methodology, secondly, to ascertain the availability of relevant data, and finally to give an initial indication of likely indicators and suggestions of areas for further work. A limited range of 30 countries with differing rates of enrolment across the sector will be studied in this initial phase.

The proposed study will rely on desk research using existing data sources as the basis of the enquiry. No field visits to developing countries are foreseen. However, up to two, one day missions to Paris will be needed to consult with the UNESCO EFA (Education For All) Global Monitoring Report team and through them the UNESCO Institute for Statistics, together with a single mission of one day to Luxembourg to consult with Eurostat. The consultants will draw upon data collected for the UNESCO publication 'The Education For All Global Monitoring Report' as a basic data source. This will be supplemented by other public domain publications as required.

5. REQUESTED SERVICES, INCLUDING THEIR IMPLEMENTATION MODALITIES WHEN RELEVANT.

The consultants will carry out a literature review to establish a theoretical and conceptual framework to be used to categorise and then analyse the education sector financing profiles of countries in two major groups: Africa, Caribbean and Pacific countries and countries covered by the Development Cooperation Instrument. It will be essential to include at least the sub-sectors of primary, secondary, vocational and skills training and higher education and to ensure that biases introduced by either very small or very large populations are addressed.

Once an appropriate set of countries has been identified (in consultation with the the European Commission) and a methodology for their analysis agreed, the consultant should carry out an analysis of the current situation and recent trends of intra-sectoral allocations to the various sub-sectors of education in the countries agreed over a time period of between five and ten years (depending on the data available. The preference is for a longer time series, but it is accepted that this may not be possible). This should relate these financial commitments to trends in education indicators by sub-sector over the same time period.

1. Indicators related to the primary sector should include but not be restricted to gender disaggregated Net Enrolment Rate, Gross Enrolment Rate, Primary Completion Rate and Pupil Teacher Ratio. The transition rate from primary to secondary should also be included and at secondary level, indicators should include Gross Enrolment Rate (GER), Pupil Teacher Ratio (PTR) and pass rate of national examinations at the end of the lower secondary and upper secondary cycle if appropriate. If a country has participated in international testing (such as Trends in International Mathematics and Science Study (TIMSS), Programme for international Student Assessment (PISA) or regional testing (eg. Southern African Consortium for Measuring Educational Quality (SACMEQ), "Programme d'analyse des systèmes éducatifs de la CONFEMEN (PASEC), then these should also be included in the analysis.

The consultant should then propose and agree with the COM a range of not more than five countries to be studied in more depth. The in-depth study should explore the possible decision making processes behind sub-sectoral allocation. This could include looking at the donor involvement in the sector or sub-sector, any major policy changes (such as the introduction of free primary education for instance) or changes in government. The aim at this stage, of this part of the work is to begin to map out possible influences on the decision making process for further research.

6. EXPERT PROFILES

One senior level, category 1, 40 working days education economist is required with proven experience of research and analysis of education sector financing in developing countries.

- Education: postgraduate diploma/degree in economics or in other relevant field.
- Experience/knowledge: at least 15 years of experience in education economics related to developing countries and proven experience of analysis of country situations and clear communication of findings to non-economist audiences.
- Proven ability to produce clear concise and accurate reports in English.

7. DURATION AND LOCATION

Duration

The time required to complete the assignment is 40 days of consultancy services these services to be provided over a period of three months.

Starting date: On signature of contract

Finishing date of the assignment: End of September 2010.

Location of assignment: experts' home base, 2 one day missions to Paris, one day mission to Luxembourg, and up to two trips to Brussels

8. REPORTING AND TIME SCHEDULE

The consultant will report to Marja Karjalainen Dev B3. An initial kick off meeting will be held within three days of the contract signature. Within ten working days of this meeting the consultant will agree with Ms Karjalainen the initial 30 countries for which a full dataset (if possible) is available and a proposal for the methodology to be used to analyse the data.

The consultant will deliver a soft copy of a draft inception report in English by mid July (exact date to be agreed at kick off meeting) giving an analysis of the current situation and recent trends of intra-sectoral allocations to the various sub-sectors of education in the countries agreed. This should relate these financial commitments to trends in education outcomes over the agreed time period. The report should also propose a range of not more than five countries to be studied in more depth (through review of available data) with regard to detail and related decision making processes.

The consultant will deliver a soft copy of a draft final report synthesising the results of the overview with the more detailed information from the 5 specific country studies, and outlining areas for further research by September 3rd.

The final report in English of maximum 25 pages with additional annexes and an executive summary should be delivered to Ms Karjalainen no later than the 16th September 2010.

9. MANAGEMENT / ADMINISTRATIVE INFORMATIONS

The study will be commissioned and managed by the EuropeAid Cooperation Office on behalf of and in close cooperation with the European Commission's Directorate General for Development, Unit B3.

DG Development/B3 is requesting this study and is thus in charge of it from a content point of view, it is AIDCO (EuropeAid Cooperation Office) /C4 that is the contracting authority. Hence all issues that touch upon the Terms of Reference the budget or any other administrative issues, have to be addressed to AIDCO(EuropeAid Cooperation Office)/C4. It is also necessary that any changes that the experts may propose during the implementation period as well as all outputs are channelled via the contractor to C4, for we have no legal ties with the experts themselves, but only with the contractor. In turn, only C4 can commit the European Commission.

The total budget foreseen for the study is €40.000.

	Expert I
Initial briefing & interim meetings	5
Data collection and analysis	15
Draft inception report	8
Draft final report	8
Final report	4
TOTAL DAYS	40

A maximum amount of 40,000 EURO is foreseen for the implementation of the assignment

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travel Luxembourg		400	2 800
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