

Bolivia: Reform of the Education Sector

Ex post-evaluation report

OECD sector	11220 – Primary education	
BMZ programme ID	1994 66 566	
Programme executing agency	Ministry of Education and Culture (Ministerio de Educación y Culturas-MEC)	
Consultant	-	
Year of ex post evaluation	2006	
	Programme appraisal (planned)	Ex post evaluation (actual)
Start of implementation	Q2 1995	Q2 1995
Period of implementation	48 months	80 months
Investment costs	EUR 7.6 million	EUR 8.0 million
Counterpart contribution	not disclosed separately	EUR 1.3 million
Financing, of which FC funds	EUR 7.6 million	EUR 6.7 million
Other institutions/donors involved	World Bank, IADB, Sweden, The Netherlands, among others	World Bank, IADB, Sweden, The Netherlands, among others
Performance rating	4	
Relevance	2	
• Effectiveness	4	
• Efficiency	5	
General developmental impacts	4	
Sustainability	4	

Brief description, overall objective and programme objectives with indicators

Bolivia's Education Reform Programme, which was supported by various donors, comprised quality improvement measures, institutional capacity building measures and measures to support Bolivia's Ministry of Education in the areas of programme management and monitoring. The German FC contribution (parallel financing) of approx. EUR 6.7 million to the education reform programme, which was designed for the most part by the World Bank, was used to finance teacher handouts, classroom libraries/textbooks and further training measures for pedagogical consultants, as well as for the funding of individual assignments of pedagogical experts. The programme aimed at improving the quality and efficiency of Bolivia's primary school education. More precisely, the general level of education and the vocational qualification of the labour potential were to be improved (overall objective). The direct target group of the programme were primary school pupils (grades 1 to 8), teachers and pedagogical consultants were intermediaries. The costs of the first phase of the education reform programme, which spanned a period of nine years from 1995 to 2003, amounted to USD 300 million, approximately

two thirds of which was assumed by the international donor community and one third was financed with Bolivian counterpart funds.

Programme design / major deviations from the original programme planning and their main causes

The overall education reform programme "Programa de Reforma Educativa (PRE)" comprised quality improvement measures, institutional capacity building measures and measures to support the Ministry of Education and Culture (Ministerio de Educación y Culturas - MEC) in the areas of programme management and monitoring. Under the FC programme (parallel financing), around 1,600 pedagogical consultants were trained in 7 advanced training courses. In addition, the printing of textbooks in Spanish, Quechua, Aymara and Guaraní for the first three grades, teacher manuals and individual assignments of pedagogical experts were financed.

The training courses for the pedagogical consultants aimed at instructing intermediaries who were to familiarise the teachers with the newly designed school practices and curricula created under Bolivia's education reform programme, to sensitise the target group for the reform of the education sector and bilingual education and to positively influence the school directors' attitude towards the reform of the education sector. The 1,600 pedagogical consultants provided further training to approx. 40,000 teachers at village and catchment area schools in the period from 1996 to 2002. Due to opposition from Bolivia's Ministry of Education, these pedagogical consultants were reintegrated into the regular public teaching system in April 2003.

The textbooks were designed for all the schools (also for those schools which originally were not included into the education reform). From 1996 to 1998, more than 6 million books (approximately 250 different textbooks) were provided for the classroom libraries. In addition, the creation of teachers' libraries at catchment area schools (approx. 100 different textbooks, in particular didactic handbooks) and orientation guidelines for the organisation and handling of classroom libraries were financed under the programme.

A major deviation from the programme planning was the shift of funds (in total approx. USD 5 million) in favour of further training measures for pedagogical consultants (funding of two other further training courses, in addition to the five planned ones) during the programme implementation.

The overall programme was largely implemented according to original planning and contributed to improving the efficiency and quality of the Bolivian primary education sector. Overall, the measures were adequate to solve the problem and appropriate to contribute to solving the core problems identified at the time of the programme appraisal. The FC component (training of the pedagogical consultants and supply of textbooks) initially also reached the expected results. However, the later withdrawal of the pedagogical consultants led to the programme's low level of sustainability.

Key results of the impact analysis and performance rating

The overall objectives of the education reform programme were to improve the general level of education and the vocational qualification of the labour potential. The literacy rate of the young population (15 to 24 years of age) increased from 1992 to 2001 and is currently at a high level of 97% (1992: 93%). Even if no reliable data is available on the influence of the education reform on the vocational qualification of the labour potential, it can be noted - particularly in urban areas - that requirements on the labour market are generally higher today. Even for relatively simple activities (carrier, domestic servant) a graduation from a secondary school is required. As regards the Millennium Development Goals (MDG), the programme contributed to the achievement of MDG 2 (achievement of universal primary education) - measured in terms of higher enrolment and primary school completion rates - and to the promotion of gender equality

(MDG 3) - measured in terms of lower gender disparity in school enrolment rates. Thus, it can be assumed that the overall programme objective has been largely achieved.

The programme aimed at improving the quality and efficiency of Bolivia's primary school education. The following indicators were defined to measure the achievement of this objective: (i) for the improvement in education quality: an increase in the number of pupils who successfully concluded the fifth grade from 72% (urban areas) and 28% (rural areas) in 1993 to 87% and 50%, respectively, in 1998; and (ii) for the improvement in efficiency: an increase in the pupil/teacher ratio from 19:1 in 1993 to 25:1 in 2000.

As far as the completion rates in the fifth form are concerned, the established objectives were reached: In 1998 the primary school completion rate amounted to 92% (urban areas) and 58% (rural areas). After 1998 the results could be improved even further: In 2002 (latest figures), the school completion rate amounted to 95% (urban areas) and 72% (rural areas). Given that in the course of the reform of the education sector, primary education was extended to include the eighth form, also the development of the school completion rates in the eighth form is relevant to measure the achievement of the indicator. Completion rates increased from 55% before the education reform in 1992 to approx. 71% in 2001. In the meantime, the school completion rate has fallen slightly and in 2005 it amounted to 69% (for both sexes). In addition, further qualitative improvements could be reached, e.g. regarding curricula development, the availability of textbooks and teacher education, even if improvements lagged behind the expectations of the Bolivian government. The intended increase in the pupil/teacher ratio, however, could be achieved only partially. Although initially, a ratio of 25:1 was reached in the period from 1997 to 2001, currently the ratio amounts to an internationally very low level of 22:1 (2005). Time and again, the two strong teachers' unions successfully fought against any reforms in the field of public staff policy (recruitment, payment, etc.). Thus, in total, it can be assumed that the programme objective has been partially achieved.

The direct target group defined in the appraisal report, i.e. all school-age children and particularly primary school pupils (grades 1 to 8), could be reached by the programme. It particularly benefited children of poor, rural population groups and girls. Other direct beneficiaries, such as teachers and pedagogical consultants, were reached through further training courses. In addition, further indirect beneficiaries were the parents and the communities. In most of the programme schools there are active parents' councils (so called "juntas escolares").

All experts agree that as far as adequate pedagogical teaching and training is concerned, the general quality level of primary education has improved through the reform of the education sector. The availability and the improved - though still low - qualification of the teachers is overall sufficient for the primary level (in contrast to the now very deficient secondary school sector). The improvement of the school infrastructure (including furniture and pedagogical equipment) in the primary schools has progressed well and only few of the schools visited under the ex post evaluation showed a need for additional classrooms. At the national level, the pupils/classroom ratio is 32:1. In most of the schools, a problematic aspect continues to be repair and maintenance of the school infrastructure. In addition, a large portion of the old infrastructure urgently needs rehabilitation.

The mostly poor target group could be reached and working and learning conditions, and thus indirectly also their living conditions, could be improved. The programme had the potential to improve the education situation of girls. In total, it contributed to a reduction in social and economic discrimination against women. The promotion of good governance and participation was not part of the programme's target system. However, through its decentralised implementation approach via the regional education authorities and the active participation of the parents and school communities, the programme has boosted the decentralisation of the education sector in Bolivia and firmly embedded possibilities for participation at the local level.

Most of the risks assumed at the time of the programme appraisal have materialised and some of them have seriously affected the progress of reforms. Particularly, opposition from the teachers' unions has made great parts of the reforms much more difficult (revision of public staff policy, including payment structures, etc). In addition, clientele-oriented policies were observed which, among others, led to the withdrawal of the pedagogical consultants or, ultimately, to the replacement of nearly all of the staff of the Bolivian Ministry of Education and Culture (MEC). Although during most of the implementation phase the political and financial support of the reform was guaranteed, the new government currently puts into question the reform approach and thus the sustainability of the measures. Particularly at the beginning of the reform measures the low level of participation of the civil society was criticised which, among others, led to the fact that critical measures (modification of the salary structures, concept of pedagogical consultants) could not be implemented against the opposition of the teachers' unions. Currently, civil society mainly takes note of the representatives of different particular interests (particularly of the representatives of indigenous groups of the population who ultimately gained political weight). Consequently, due to their high level of organisation, the unions dominate the public discussion. Thanks to the broad support from the population, however, the establishment of participatory mechanisms, such as the parents' councils (*juntas escolares*) was possible even against the unions' opposition. These mechanisms are to be maintained and strengthened also in the future.

Overall, the education reform programme can be rated as mostly successful. The FC component, which mainly served to finance the training of pedagogical consultants (approx. 57% of the costs of the FC component), has contributed only insignificantly to this because the concept of the pedagogical consultants could not be implemented against the opposition of the unions, was abolished in 2004 and has not been further pursued by the present Bolivian government. We rate the FC programme as follows:

1. The relevance of the overall programme and of the FC programme can be assessed as good (sub-rating 2). The education reform was suitable to contribute to the solution of one of the core problems by improving the low education quality and the institutional framework. Subsequently, infrastructure measures were implemented to put the primary school system on a broader basis. Coordination between the donors and the Ministry of Education and Culture (MEC) has improved substantially.
2. The defined overall programme objectives, i.e. the increase in the school completion rate for the fifth and/or eighth grade, have been largely achieved. The improvement of the pupil/teacher ratio, however, fell short of the established objectives. The effectiveness of the FC programme is slightly insufficient (sub-rating 4). The function of the pedagogical consultants - whose further training was financed primarily from FC funds - has been abolished in the meantime and it is not to be expected that this part of the reform measures will be resumed after a change of government. This has substantially hindered the implementation of the new curriculum.
3. The efficiency of the overall programme is not satisfactory. Great efforts had to be made to achieve the defined programme objectives. Thus, the actual costs of the education reforms exceeded the original planning by 50%. We also rate the efficiency of the sector policy to be low, since personnel costs are very high (89% of running costs in comparison to the FTI benchmarks of not more than 66%). The efficiency of the FC component has been clearly insufficient (sub-rating 5) due to the withdrawal of the pedagogical consultants (sub-rating 5).
4. The developmental impacts of the overall programme are satisfactory. During a period of approximately 10 years and several government periods (5 Ministers of Education and Culture in the last two years alone) education reform constituted the political framework for improvements in the education sector, stipulating sector policy and having a structure-building effect (even outside the MEC). Despite strong polemics of the new government against the education reform, essential elements (curriculum/bilingual education, decentralised structures, etc.) will be continued. Finally, the defined overall objectives could

be achieved - measured in terms of a higher literacy rate of the young population and better perspectives in the job market. Due to the low effectiveness of the measures, the contribution of the FC component to the achievement of the overall programme objective was slightly insufficient (sub-rating 4).

5. We rate the sustainability of the FC programme to be slightly insufficient (sub-rating 4). The withdrawal of the pedagogical consultants and the replacement of nearly all the staff of the Ministry of Education and Culture (MEC) as well as the government's severe criticism of the education reform had a negative impact. In addition, hardly any efforts to further improve the quality of education can currently be discerned.

We judge the overall developmental effectiveness of the FC programme to be slightly insufficient (sub-rating 4).

General conclusions and recommendations

- Many countries have to face considerable qualitative and quantitative systemic weaknesses. When local resources are scarce it seems to be a valuable approach first to progressively resolve qualitative and efficiency-related bottlenecks and in a second step to support the broad-based expansion of the education system (today, however, many sector-wide programmes simultaneously focus on improving efficiency, quality and the access to the education sector). It has become apparent that a (quantitative) expansion of the school infrastructure could be achieved more quickly and easily than the improvement of qualitative aspects of primary education (advanced training for teachers, development of curricula, etc). Thus, in similar cases, quality improvement measures should be given priority, establishing adequate time frames for the period of implementation.
- Through the pooling of several donor projects to form a sector-wide programme, sensitive sector-policy aspects can be better addressed than in a bilateral dialogue. Even if in the present case the sector dialogue did not produce satisfactory results in all respects, the probability of success is higher in coordinated and/or joint discussions than in the bilateral sector dialogue.
- Particularly in sensitive areas of policy dominated by strong interest groups (by unions or other types of organisations), participation of the civil society and, finally, broad support of the population for the reform policy is needed. To this end, a broad-scale social dialogue has to be maintained (even if this is to the detriment of a rapid implementation of measures) to create sufficient pressure on interest groups. These objectives can usually not be reached in direct negotiations, because well-organised unions can block and later on reverse reform projects - as happened in the present case.

Notes on the methods used to evaluate project success (project rating)

Projects are evaluated on a six-point scale, the criteria being relevance, effectiveness, “overarching developmental impact” and efficiency. The ratings are also used to arrive at a final assessment of a project’s overall developmental efficacy. The scale is as follows:

1	Very good result that clearly exceeds expectations
2	Good result, fully in line with expectations and without any significant shortcomings
3	Satisfactory result – project falls short of expectations but the positive outcomes dominate
4	Unsatisfactory result – significantly below expectations, with negative outcomes dominating despite discernible positive outcomes
5	Clearly inadequate result – despite some positive partial outcomes, the negative outcomes clearly dominate
6	The project has no impact or the situation has actually deteriorated

A rating of 1 to 3 is a positive assessment and indicates a successful project while a rating of 4 to 6 is a negative assessment and indicates an unsuccessful project.

Sustainability is evaluated according to the following four-point scale:

Sustainability level 1 (very good sustainability)

The developmental efficacy of the project (positive to date) is very likely to continue undiminished or even increase.

Sustainability level 2 (good sustainability)

The developmental efficacy of the project (positive to date) is very likely to decline only minimally but remain positive overall. (This is what can normally be expected.)

Sustainability level 3 (satisfactory sustainability)

The developmental efficacy of the project (positive to date) is very likely to decline significantly but remain positive overall. This rating is also assigned if the sustainability of a project is considered inadequate up to the time of the ex post evaluation but is very likely to evolve positively so that the project will ultimately achieve positive developmental efficacy.

Sustainability level 4 (inadequate sustainability)

The developmental efficacy of the project is inadequate up to the time of the ex post evaluation and an improvement is very unlikely. This rating is also assigned if the sustainability that has been positively evaluated to date is very likely to deteriorate severely and no longer meet the level 3 criteria.