



External Evaluation of the Education for All Global Monitoring Report

Final Report

UNESCO

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Abbreviations and acronyms

ADG	Assistant Director General
ASER	Annual Status of Education Report
BRAC	Bangladesh Rural Advancement Committee
CAMFED	Campaign for Female Education
CCNGO/EFA	Collective Consultation of NGOs on Education for All
CSO	Civil society organisation
DFID	Department for International Development
DPI	UNESCO Division for Public Information
ECCE	Early Childhood Care and Education
ED	Education
EFA	Education for All
E/C	Education for Change
EMF	Education Monitoring Function (post-2015)
FGM	Female Genital Mutilation
GCE	Global Campaign for Education
GDF	Global Development Framework
GEM	Global EFA Meeting
GMR	Global Monitoring Report
GPE	Global Partnership for Education
HQ	Headquarters
IBE	International Bureau of Education
IFAD	The International Fund for Agricultural Development
IIEP	The International Institute for Educational Planning
INEP	Instituto Nacional de Estudos e Pesquisas
INGO	International non-governmental organisation
LDC	Less Developed Country
MDG	Millennium Development Goal
MOU	Memorandum of Understanding
MDTF	Multi-Donor Trust Fund
NatCom	National Commission (of UNESCO)
NGO	Non-governmental organisation
ODA	Official Development Assistance
ODI	Overseas Development Institute
OECD	The Organisation for Economic Co-operation and Development
OOSC	Out of school children
SDSN	Sustainable Development Solutions Network
SEAMEO	The Southeast Asian Ministers of Education Organization
SPSS	Statistical Package for Social Scientists
TOC	Theory of Change
TOR	Terms of Reference
TVET	Technical and Vocational Education and Training
UIE	Institute for Education
UIL	UNESCO Institute for Lifelong Learning
UIS	UNESCO Institute for Statistics
UKFIET	UK Forum for International Education and Training
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNGA	United Nations General Assembly
UNGEI	United Nations Girls Education Initiative
WIDE	World Inequality Database on Education

Executive Summary

This is the report of an evaluation of the Education for All (EFA) Global Monitoring Report (GMR). The evaluation was undertaken by Education *for* Change between November 2013 and June 2014.

The GMR was established after the 2000 Dakar declaration re-invigorated commitment to EFA, in response to an expressed need for improved monitoring of progress towards the EFA goals, and to provide evidence to hold the parties to account for their commitments. It was established as an editorially independent body, housed within UNESCO HQ in Paris, and, since 2002, has produced annual monitoring reports that include policy analyses and additional thematic coverage. The GMR team has increasingly produced related products and exploited communication channels to complement and disseminate its work.

About the evaluation

Purpose and scope

This evaluation of the GMR has two purposes, which reflect its timing:

- Looking backwards, it assesses the GMR's position and contribution to progress towards the EFA goals and the MDGs, specifically looking at its influence on policy dialogue around EFA at international, regional and national levels.
- Looking forward, it provides options for future modalities, design, governance and financing of an education monitoring function in a post-2015 framework.

The post-2015 architecture has been emerging during the period of the evaluation and remains unclear at the time of writing: recommendations and options reflect this uncertainty.

The audience is the GMR team, the Advisory Board to the GMR and those involved in planning monitoring functions in the post-2015 education landscape.

The evaluation has posed three overarching questions:

1. What is the value of the GMR with respect to its contribution towards EFA?
2. How effective are the governance and financing structures of the GMR to ensure the achievement of its intended aim?
3. What are the options for the design and scope of a report monitoring progress in education after 2015?

Methodology

An indicative Theory of Change (TOC) was developed during inception and used to develop the initial evaluation questions into the evaluation framework. The framework was in turn the basis for the development of evaluation instruments and to guide reporting.

The evaluation included:

- desk review of GMR documents, analysis of background papers, media analysis and web-analytics, review of GMR distribution and analyses of GMR launches;
- bibliometric analysis of citations of the GMR and background papers;
- face-to-face and telephone interviews with international and regional stakeholders;
- online surveys of stakeholders and, separately, of UNESCO field offices;
- case studies in Brazil, India, Kenya, Lebanon, Russia, Senegal, the UK and Viet Nam; and
- a Delphi survey seeking responses to nascent conclusions and recommendations.

Findings

Quality of the GMR

The GMR is widely perceived to be a high quality report, based on robust research and analysis that has firmly established it as an important resource for the education sector. The GMR's ability to present complex data and concepts in useable and engaging ways, both in the report and through other outputs, is recognised and much appreciated.

Whilst the research and analysis is seen as rigorous, international and national stakeholders have identified a need for stronger, more structured consultation processes to widen the geographical representation and evidence base of the report. The constraints imposed by the tight production cycle for the GMR is one factor that has hindered improvements in this area.

Some national level stakeholders perceive the GMR as biased towards low-income developing countries and thus not as relevant to their middle- or higher-income contexts. At international and national levels relatively weak coverage of non-formal and private sector education is noted.

International commentators recognise the education data constraints with which the GMR has to operate and acknowledge the increasing efforts of the GMR to draw on new data sources in useful ways (particularly the WIDE database).

The GMR's independence is viewed as critical to the report's credibility and reputation. Its relationship with UNESCO is seen as supporting that independence. For stakeholders at national levels the constituency and structure of UNESCO confers on it an assurance of impartiality.

The GMR has maintained a delicate balance between its monitoring role and communicating/advocating around its key messages. Some international interviewees from international non-governmental organisations (NGOs), research and multilateral agencies have raised a concern that the GMR has come increasingly close to tipping that balance through pushing more methodologically challenging global figures for advocacy messages. Whilst these messages have stimulated valuable debate, these interviewees have raised a potential risk to the GMR's reputation for credible and impartial analysis should this advocacy trend go much further in the future.

Outreach

Overall, awareness of the GMR is high amongst international stakeholders but at national levels limited access has meant that awareness of both the GMR and other GMR products is low.

The GMR has expanded its communication and dissemination channels since the last evaluation in 2009, and some communication channels in particular have been very successful. However, there is no overall dissemination strategy that draws together all the channels of GMR dissemination and communication and considers their use strategically in terms of their ability to reach and influence disaggregated target audiences.

Distribution of at least half of the hard copies of the GMR relies on UNESCO field offices that rarely have strategies in place to ensure that copies reach key stakeholders. This is a particular challenge in regions covered by only a few field offices. The UNESCO network leaves significant geographical gaps in distribution, notably in Eastern Europe and Central Asia. Distribution direct to other stakeholders, which is based largely on requests for copies, is strongly concentrated in Europe and North America. Soft copies are also more likely to be downloaded in high-income countries

The international GMR launch has been well managed in recent years to create a 'big splash' and maximise media attention, with media coverage globally expanding year on year around each launch. However, reliance on UNESCO offices to initiate, organise and build on the national launches has resulted in widely varying degrees of effectiveness (in terms of raising awareness amongst key policy audiences, stimulating debate and distributing the GMR), despite efforts by the GMR team to strengthen their inputs into these events.

In both press and social media coverage the GMR has excelled in recent years. Global press coverage is significant and the GMR has established a strong social media presence, with regular quantitative monitoring of its reach through these channels. The reach to specific target audiences involved in policy discourse and the influence of such social media reach, however, is less clear.

International partnerships developed by the GMR team for each individual report have strengthened both the consultation opportunities with core groups related to the report's annual theme (youth in 2012 and teachers in 2013/14) and advocacy work by partner organisations around specific parts of the report.

Within academia, citations of the GMR have risen significantly since 2009: authors located in South East Asia, Latin America and Central Asia are conspicuous by their absence, however.

Impact

Overall, where stakeholders are aware of the GMR and have access to it, it is playing an important and influential direct and indirect role in policy discourse and policy making. This is particularly the case at international levels. However, the reach and awareness are too low at national levels to provide regular or consistent influence on policy dialogue in many countries.

Stakeholders at both national and international levels use the GMR as a reliable and authoritative source of reference to inform and strengthen their work, particularly in research reports and presentations. Within academia it is commonly used to frame and contextualise research questions and is increasing in visibility.

Stakeholders most often draw on statistics from the GMR, but thematic and EFA progress analyses are also commonly used, as is, to a lesser extent, the work on education financing (where the GMR analysis is very strongly cited amongst those most concerned with this issue).

At international and national levels, the GMR provides advocacy stakeholders with valuable and credible evidence to feed into their materials and activities. The annual publication of the GMR provides a vital regular window of opportunity for advocacy organisations as increased attention is drawn to education by the new report. The GMR is also used within international organisations to strengthen internal advocacy for education programming and resourcing. In some cases, however, controversial data, perceived lack of relevance and the tone of GMR messages have undermined the usefulness of the GMR to some advocacy organisations.

At the international level, the GMR is actively used within policy discourse and policy decision-making and its response to emerging issues and trends (such as through the development of the WIDE database) has kept it central to evolving post-2015 discussions.

At national level, there is some evidence of the GMR directly informing policy through four main routes: use for regional/global benchmarking; contributing to momentum and policy action around a specific issue; providing tools and examples from which policy-makers can draw; and provoking public reactions from policy-makers. However this influence is constrained by the limited circulation of the GMR messages and products at national levels. International interviewees commented on a need for more targeted and disaggregated products that reach the hands of policy-makers not only in the education sector but in other sectors that contribute to education policy (finance, human resources, health etc).

Governance

The governance arrangements for the GMR are not formally specified and, in practice, are played out in the relationships between UNESCO (as the host organisation), the Advisory Board, and the management and executive power of the GMR Director. This lack of formal governance structures and processes has been retained intentionally to reduce bureaucracy and enable the GMR to remain flexible in how it operates and manages each annual cycle of production and dissemination.

To date the balance of these relationships has been maintained due to good working relationships and understanding between individuals in the agencies involved, and the independence of the GMR has been protected. This is the perception of the majority of international informants and stakeholders, although some confusion exists about exact roles and responsibilities. There are also some concerns over the range and weight of different voices represented on the Advisory Board (in particular the need for greater representation from the South), with potential risks to the impartiality and representativeness of the advice that the GMR receives from this body.

The 2009 evaluation of the GMR recognised that, although these undocumented relationships ‘worked’ to an extent, the overall effectiveness of the GMR could be improved by greater clarity in roles and responsibilities through a partnership agreement.¹ No changes have been made since then, however.

Finance

The current pooled financing structure is considered to have the merit of ensuring the GMR’s independence. However, bilateral donors dominate and are always subject to changes in internal government policy and constraints on the longer-term predictability of their funding. As a result the GMR has had no certainty of funding beyond one to two years at best and sometimes only for a single report’s lifecycle. This short-term funding basis is inherently unstable, has created financial uncertainty and militates against medium- to long-term strategic planning for the GMR.

In principle, widening the range of funders while maintaining the pooled funding model is favoured by Advisory Board members and other international stakeholders. However, the internal constraints of funders are an intractable issue (noted also in the 2009 evaluation) and the problems involved in getting new or more predictable funding cannot be underestimated. There have been some successes in doing this in recent years with one-off funding from two foundations and a new bilateral donor but this has required significant staff time to secure.

Overall the GMR is considered to be good value for money by representatives of its funding organisations, on the basis that monitoring the EFA goals is essential and no single agency could do it for the cost of their individual annual donations. The GMR has had to make cost-saving decisions over the last few years due to increasing requirements to demonstrate value for money and limited funding, but has maintained core investment in research to ensure the quality of the GMR products.

Post-2015

Evaluation informants were asked to reflect on what changes might make a monitoring function and report more useful, taking account of the emerging post-2015 debate. Most responses were, implicitly, predicated on there being a post-2015 Global Education Framework.

In general, stakeholders foresee a strong continued need for monitoring in the education sector, and recognise the key relationships with UNESCO, as the holder of the UN mandate for education, and UNESCO Institute for Statistics (UIS) with its responsibility for global education statistics.

It is likely that the new international architecture for development goals and the monitoring function(s) developed for these will entail new accountability demands for an education monitoring function. There is a strong feeling that voices from the global South and from civil society will need stronger representation in the consultation and advisory inputs to new monitoring arrangements in order to strengthen and maintain global representativeness, legitimacy and authority.

The GMR has, to date, maintained a good balance between thematic and EFA monitoring analysis. There is potential for greater flexibility in how these elements are packaged, but an annual monitoring output is seen as an important minimum. The exact structure of any future education

¹ Universalia (2010), *Evaluation of the Global Monitoring Report Final Report. Volume I*, Recommendation 7

monitoring products will need to respond to the requirements and demands of the new indicators and monitoring structures, which may define what is possible. However, it is strongly felt that the post-2015 arrangements must have a monitoring function that meets the quality standards established by the GMR.

Main conclusions

Post-2015 landscape

The EFA mandate of the GMR will cease in 2015, and new international architecture for the agreed Development Goals will mean that it will not be “business as usual” for the GMR. The changes post-2015 are likely to require a monitoring regime able to meet the technical and political challenges arising from the strong quality and equity agendas in the education sector and the potential inclusion of targets that are fitted to national or regional contexts. The monitoring function for education will also be part of a strong global and cross-sector mechanism to which it will have responsibilities, and from which it should expect more reliable support to fulfil its global function. Building on the work of UIS and GMR (and others) the education sector may be in a better position to respond to the changes than some sectors, but it will be necessary to work alongside all concerned for common approaches and efficient use of resources.

Quality

The GMR has established a strong reputation for quality, accuracy and reliability, has acted to widen data sources and become an important player in moves to improve education monitoring. The editorial and operational independence of the GMR has been maintained and is highly valued, and its relationship with UNESCO has been managed to mutual benefit.

The GMR has been well aligned with major trends in the education sector and, in some cases, has provided an important guiding input to global and national debate and policy thinking. However, there are concerns that, due to the straitjacket of the EFA mandate, the GMR inadequately represents diverse education models, and that consultation and advisory inputs into the GMR do not adequately represent voices from the global South, which weakens its perceived relevance and legitimacy to important target audiences.

The GMR team has been able to achieve a difficult balance between EFA monitoring and thematic analysis in its current reports, but there may be some merit in thinking more flexibly about how these elements are turned into specific products. This will also need to take account of the particular requirements and demands of the post-2015 monitoring framework.

Outreach

The complexity of the GMR’s TOC, and the various routes to different audiences, would be challenging to any similarly resourced team. In dissemination and outreach the GMR makes some links to audiences very effectively, particularly among the international NGO, donor and development communities. However, the balance has become somewhat skewed overall: investment in media, social media and communications channels has been very effective in reaching diffuse public audiences and some international audiences involved in international policy dialogue, whilst other channels necessary to get the report messages and its analysis into policy and decision-making processes (for example, through national policy-makers or national civil society) require more strategic thinking and development, particularly at national levels. Issues include the limitations of physical distribution through UNESCO field offices, limited understanding of needs and reach towards specific audiences, language constraints, and knowledge products and tools that support the mediation of messages into national policy discourse. Outreach activities as a whole, including launches and hard copy distribution, are not subject to adequate long-term strategic planning to assess impact and value-for-money in the light of target audiences.

The GMR has moved closer to an advocacy role on EFA in recent years and needs to maintain a delicate balance between its monitoring and awareness-raising roles to retain its valuable reputation for impartiality. The GMR's recent successful partnerships with other organisations to support the use of a specific GMR in advocacy, point to the potential for a more systematic approach to partnerships that maintains core advocacy partners around the mandate of annual education monitoring as well as one-off partnerships around specific themes.

Impact

When the GMR is known and accessed, it can play an important role in influencing policy through direct contributions of analysis, concepts and recommendations, adding to and strengthening the advocacy work of others within the policy discourse, and providing background to inform stakeholders' understanding of the context and framing of the global education sector. Adequate reach to open up these pathways to policy influence is critical. At the international level such reach has largely been achieved, and the GMR has become a "must-have" reference for donors, INGOs and development agencies. However, further work is needed both to broaden cross-sectoral engagement with the GMR and get GMR products and messages to national stakeholders.

Governance

The GMR team works to a punishing schedule in which they manage a round of critical fixed period tasks, from commissioning to publishing and printing. Within this environment, the team have made a strong case for operational independence and for minimising governance and managerial overheads. Time constraints have been cited as the limiting factor to wider consultation and partnerships, for example, and, indeed to any additional management and accountability structures.

Although operations on an annual basis have been well-managed and accounted for, there are risks associated with the weak accountability mechanisms in place; there is no effective mechanism for oversight of individual Director's forward plans for operations and spending commitments. The assumption is that the Director is always fully competent and willing to make the right decisions and set the right spending priorities. If this assumption fails there is significant financial risk, as well as possible risks to the reputation of the GMR itself. In the event of an irresolvable difference of opinion between the GMR Director and UNESCO (as the hosting body) the Director also has no recourse to a properly mandated governance body that represents the other stakeholders (donors, other UN bodies etc.).

If global monitoring is to operate at the heart of the post-2015 framework (possibly a UN-wide monitoring system) several characteristics are likely to require more accountable and resilient governance and oversight structures. For example, the increasing emphasis among bilateral and multilateral development funders on results-based management of funded programmes requires a governing body to oversee and monitor management performance against agreed results indicators. In this context, having transparent and accountable governance mechanisms in place is likely to encourage bilateral donors in particular to approve longer-term financial commitments.

A relatively simple separation of advisory and governance functions, and a steering committee representative of the funders and key stakeholders of the education monitoring function, could not only mitigate the risks of weak governance, but also bring significant benefits to a post-2015 monitoring entity.

UNESCO has the UN mandate for education, has legitimacy and, with UIS, has responsibility for global educational statistics: there is no other organisation that has the same credentials as a host for the global monitoring function.

Management and operations

The governance arrangements have allowed, and, arguably encouraged, short-term planning for the GMR, and its management as an annual 'project' without a locus for strategic planning. Whilst the

GMR Director and team have thought and acted strategically within the framework of an annual report production and dissemination cycle, this has not been strategic planning in a consistent or long-term sense, nor has the Advisory Board facilitated an agreed longer term (e.g. four year) strategic approach to the GMR's function and purpose in which to frame annual plans and provide a basis for accountability and strategic developments such as partnership building.

The need for consultation with stakeholders has emerged at several points throughout this evaluation (as it did in the 2009 GMR evaluation) in relation to content, dissemination and tools to support EFA advocacy. The problem of soliciting meaningful contributions on content, especially from developing countries, has been intractable given the GMR's limited resources and country-level reach through UNESCO offices. There may, however, be scope for collaborating with the UNESCO Regional Education Bureaux (or possibly other relevant partners with global reach) on consultative meetings, or piggy-backing on other timely events. On advocacy the GMR team also needs to complement its expertise through consultation with those actively involved in complex policy advocacy, so that partners can help to inform useful product formats and dissemination channels and amplify and direct messages coming out of the report.

Finances

The GMR has begun to experience the new landscape of aid funding that requires tangible high-level results delivered with due regard to value for money both in operational efficiencies (which GMR has pursued effectively) and in the metrics of impact, which remain problematic. Significant effort and time will be needed to build the appropriate results-based frameworks and internal monitoring procedures. The search for more stable funding may also be facilitated by strengthened governance structures and a funding mechanism allied to that structure such as a multi-donor trust fund.

Recommendations

Top line recommendations are presented below – further details on each recommendation are given in the main report.

Recommendation 1: The editorial independence of the education monitoring function (EMF) must continue to be guaranteed and enshrined in any new structures and agreements.

Recommendation 2: The EMF should be underpinned by a strategic planning cycle so as to facilitate longer financing arrangements and provide for outcome level results-based management.

Recommendation 3: Within this strategic exercise the principle should be to design the *content and format* of EMF products to meet specific audience needs, with an annual monitoring output as the only minimum requirement.

Recommendation 4: Within this strategic exercise consideration should be given to optimising *dissemination* of appropriate EMF products to disaggregated target audiences, particularly those at national levels.

Recommendation 5: The GMR team should undertake preparatory actions for post-2015 that strengthen representativeness and outreach, and position it better to take on the post-2015 EMF.

Recommendation 6: To support the new EMF mission and mandate, a representative Advisory Board should continue with an explicitly technical and advisory role.

Recommendation 7: To support the new EMF mission and mandate a small editorial group should be maintained.

Recommendation 8: To support the new EMF mission and mandate a small group should be established to advise on dissemination and support to Global Development Framework advocacy.

Recommendation 9: The annual outputs of the EMF should be published in all the UN official languages as a matter of course.

Recommendation 10: Whatever the eventual shape of the Global Development Framework and its implications for the EMF, the GMR team should set aside a preparatory period of 12 months to: a) adjust to the data and monitoring requirements of the new framework; b) research and develop a robust medium-term strategic plan for the EMF; and c) formalise partnerships e.g. for research and dissemination.

Recommendation 11: The management and administrative capacity in the GMR team will need to be expanded to undertake the EMF.

Recommendation 12: A service level agreement or memorandum of understanding (MOU) between the EMF and UIS should be drawn up as the formal basis for the relationship.

Recommendation 13: UNESCO should remain as the hosting agency for the EMF.

Recommendation 14: A steering committee should be established, in collaboration with UNESCO and other Global Development Framework agencies, and endorsed by the UN Secretary General's office as appropriate, to provide the governance, accountability and oversight mechanism for the EMF.

Recommendation 15: A multi-donor trust fund (MDTF) should be established for the EMF, which would retain the pooled funding principle and be open to a wide range of national and international funders.

1 Overview of the Global Monitoring Report for EFA

1.1 Contexts

1. The Education for All (EFA) Global Monitoring Report (GMR) was a response by the global community, led by key bilateral agencies, to the restatement and reinforcement at Dakar in 2000 of the commitments made at Jomtien in 1990 to reach six EFA goals² by 2015. The GMR reflected concern for better ways to monitor progress and hold countries to account for their commitments.
2. The GMR was established as an independent entity financed by contributions from supportive agencies and housed within UNESCO headquarters (HQ), Paris. Since 2002 the team has published annual reports that monitor global progress towards EFA, analyse policies relevant to EFA and explore in greater depth an EFA-related theme, starting with those around the six EFA goals and extending to cross-cutting or contextual issues.

1.1.1 EFA bodies

3. The EFA coordination architecture was reformed in 2011-2012 to strengthen national, regional and international linkages, improve Member State accountability, enhance knowledge sharing, increase evidence-based advocacy outside the education sector and better reflect all aspects of the EFA movement.³ As a result, the annual Global EFA Meeting (GEM) was set up to bring together representatives of UNESCO Member States, EFA convening agencies, UN and regional organisations, civil society organisations (CSOs), bilateral agencies, the private sector, research institutes and foundations. Its main purpose is to assess progress towards EFA based on the GMR and regional reports, to agree on tangible actions for follow-up and to prepare the future education agenda.
4. The EFA Steering Committee was established in April 2012. It consists of nineteen members representing UNESCO Member States, the E-9 Initiative, EFA convening agencies (UNESCO, UNDP, UNFPA, UNICEF and the World Bank), the OECD, civil society and the private sector. The role of the Steering Committee is to provide strategic direction to the EFA partnership, monitor progress, and advise on how to scale up efforts in order to meet the six EFA goals. A major task of the Steering Committee is to discuss the development of the post-2015 education agenda.
5. The Collective Consultation of NGOs on Education For All (CCNGO/EFA) is UNESCO's main mechanism for dialogue, reflection and partnerships with NGOs around EFA. The CCNGO/EFA network includes close to 300 national, regional and international member organisations.

1.1.2 Changing contexts

6. After 2000, EFA worked alongside the education elements of the Millennium Development Goals (MDGs), which set education targets for 2015 for Universal Primary Education and for gender equality in primary and secondary education. The existence of two sets of different (albeit consistent) targets has complicated the operational and political context for EFA and hence for the GMR. UNESCO has been historically, and philosophically, committed to the more educationally comprehensive EFA goals, but much of the UN system, including the World Bank, and many developing countries have taken the MDGs more publicly into political discourse. The MDGs have their own, separate, monitoring structure, which, for education, takes data from the UNESCO Institute for Statistics (UIS), as does the GMR.
7. Since the first GMR in 2002, EFA and the MDGs have played out against some important contextual changes including:

² <http://www.unesco.org/en/education-for-all-international-coordination/themes/efa-goals/> (referenced 10/05/2014)

³ UNESCO (2011), "Reports by the Director-General on Education for All, Part 1", 187 EX/8

- The economic crisis of 2008, which saw many countries facing financial constraints, affecting education funding and official development assistance (ODA) commitments and slowing down previous expectations;
- A changing mix of organisation and financing of education in developing countries, including the growth of private sectors; and
- Growth in some countries’ financial capacity, which has started to change relationships between national government and donor and lending agencies, and lessen the latter’s leverage on policy.

1.1.3 Post-2015

8. The nature of the post-2015 Global Development Framework (GDF), as it pertains to education, is not yet fully developed or agreed. UNESCO has taken a lead in a UN-wide and more extensively consultative process. The GMR has contributed both in shaping the post-2015 agenda and by contributing to technical work on the indicators and data issues for monitoring. However, whether a new EFA will be developed alongside a global education goal, or be integrated within the overall GDF, and how monitoring of this framework will be structured (e.g. through a single cross-sectoral body, through sectoral agencies reporting into a central body, or independently by sectors) remain questions that will have a significant impact on the future of the GMR and the relationships, partnerships and responsibilities that might be required within this new development landscape.

1.2 The purpose and principles of GMR

9. The purpose of the GMR is set out in its 2002 Vision Statement. Whilst some details have changed over the years (e.g. the editorial board is now called the Advisory Board), this Vision Statement has been retained and continues to capture the purpose and principles of the GMR:

Mandate	The Dakar Framework for Action
Vision	An authoritative annual report, which holds the global community to account for commitments made at the World Education Forum. It will chart progress against the six Dakar goals and targets, including the Millennium Development Goals for education, highlight effective policies and strategies, alert the global community to emerging challenges and promote international action and co-operation. An indispensable advocacy and technical tool for everyone involved in promoting Education for All.
Audience	An annual reference point for individuals, governments, policymakers, civil society, international and non-government organisations and the media.
Independence	Prepared by an international team based at UNESCO in Paris and the UNESCO Institute for Statistics (UIS) in Montreal, the Report is a collective endeavour, funded jointly by UNESCO and multilateral and bilateral agencies. It benefits from the advice of an international editorial board which meets twice a year. The Director of the Report Team takes full responsibility for the analysis and opinions expressed in the Report which is submitted to the Director-General of UNESCO.
Contents	The Report tracks progress, maps trends, identifies effective reforms and policies, assesses political commitment, raises awareness of challenges and constraints, and promotes specific international strategies and co-operation. From 2003, each edition will chronicle progress on one major theme relevant to EFA.
Data	Each Report includes the latest available statistics and analyses on progress towards the EFA goals and targets.
Expertise	The Report draws on scholarship and expertise from a wide range of stakeholders - governments, UNESCO Institutes, notably UIS, the Institute for Educational Planning (IIEP), the Institute of Education (UIE) and the International Bureau of Education (IBE), non governmental agencies, bilateral and multilateral agencies, and research institutions worldwide. It combines the best analytical rigour and scholarship with clarity of presentation and argument.
Publication	The Report issues annually, prior to the meeting of the EFA High Level Group.
Communication	The Report builds on a strong communication and consultation strategy designed to share, disseminate and interpret its findings globally.

2 Evaluation purpose and scope

2.1 Purpose of the evaluation

10. This evaluation of the GMR has two main, interrelated strands of work:

- Looking backwards, it assesses the GMR's position and contribution to progress towards the EFA goals and the MDGs, specifically looking at its influence on policy dialogue around EFA at international, regional and national levels
- Looking forward, it provides options for future modalities, design, governance and financing of a GMR in a post-2015 framework.

11. The first strand of the evaluation involves an analysis not only of the influence the GMR has had, but also how and why influence has occurred, in order to learn lessons for the future of the GMR. The quality of the GMR (including all GMR products such as the background papers, policy papers, website, media feeds etc.), the processes of its production and dissemination (including the types of GMR products, how they are communicated and disseminated), and the extent to which the governance and financing structures of the GMR support these aspects are therefore the main concerns.

12. The post-2015 framework, and the specific position of, and goals for, education within that framework, will have significant implications for the continuation and form of an education monitoring function in the future. There are overarching considerations emerging for the post-2015 position⁴ which the evaluation has used to frame an assessment of how the GMR should continue after 2015 in terms of structure and modalities. This assessment draws on the lessons learned from the GMR in the past decade to suggest options for the report structure, branding, hosting, governance and financing of a future GMR that will maximise its value in the new global development landscape. The terms of reference for the evaluation are provided in Appendix 1.

2.2 Scope of the evaluation

13. The evaluation covers the period from the inception of the GMR in 2002 until the present, with a specific focus on the three most recent Reports and associated activities and materials. This recognises the coverage of the two previous GMR evaluations (2006 and 2009) and changes in the GMR since 2010, some of which are responses to recommendations in those evaluations. However this evaluation recognises that the whole period of GMR production contributes to lesson-learning at the end of the EFA framework.

14. The GMR is intended to contribute to the achievement of EFA by monitoring progress towards each of the goals, providing tools to hold governments to account and providing the evidence and ideas to inform and influence policy-making at national and international levels.

15. The TOR for the evaluation posed three overarching evaluation questions:

1. What is the value of the GMR with respect to its contribution towards EFA?
 - 1.1 To what extent is the report providing a good quality, evidence-based assessment in monitoring progress towards EFA, and in analysing specific themes?
 - 1.2 How effective is the GMR's communications and outreach in promoting the report's messages to its intended audiences?

⁴ See EjC (2014), 'External Evaluation of the Education For All Global Monitoring Report: Inception Report', p.3

- 1.3 In what ways has the GMR influenced policy dialogue at global, regional and national levels?
2. How effective are the governance and financing structures of the GMR to ensure the achievement of its intended aim?
3. What are the options for the design and scope of a report monitoring progress in education after 2015?
 - 3.1 Aims and focus: What are the different scenarios in relation to its aims, focus and approach in order to maximize its value to new global frameworks?
 - 3.2 Governance: What are the options for its governance and financing to achieve the intended aims?

2.3 Theory of Change

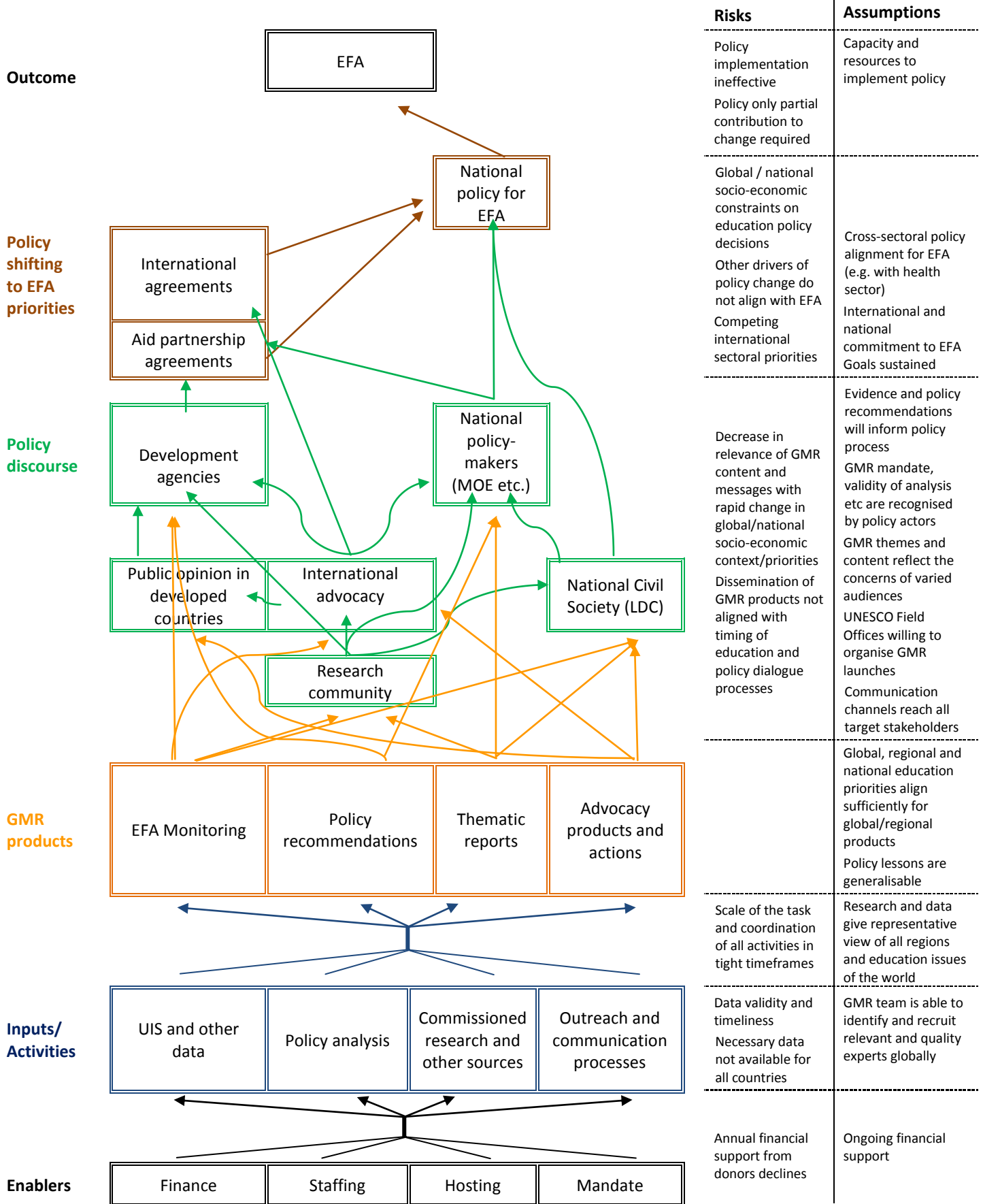
16. During inception the evaluation team produced a Theory of Change (TOC) for the GMR's expected pathways of contribution towards the realisation of EFA. The TOC (Figure 1) shows routes from the inputs to the GMR (finance, staffing, hosting and mandate) to the progress of the EFA agenda globally and nationally: it captures (some of) the complexity of the channels by which the GMR may influence evidence-based policy, the different actors involved, and the associated risks and assumptions at each level, reflecting research approaches to evaluating policy influence.⁵ The TOC highlights the ways in which the GMR attempts to reach different audiences (direct influence), and in turn, how agencies within the development discourse inform and advocate with their peers and with those engaged in policy processes (indirect influence). It is important to note the inter-relationships and inter-dependence of many of the linkages within policy discourse and that these links are embedded in a wider context of multiple and changing actors, interests, priorities, and cultural, economic, social and political situations at both national and international levels. Establishing direct attribution of policy development to the GMR (or any individual strand of influence) within this complex arena is extremely difficult; a contributory analysis reflects a more realistic approach to understanding the various layers and pathways of influence involved, which requires following through and examining each of the levels and linkages of the TOC and how they build on one another.

17. The TOC has been used to structure the evaluation questions and findings. For example, Question 1.2 from the TOR asks how effectively the GMR reaches those involved in policy discourse (the orange arrows of the TOC) and Question 1.3 asks how they (and, more directly, policy-makers) have used or been influenced by the GMR to facilitate policy shifts towards EFA (the green arrows).

18. At the start of each section in the evaluation Findings, the relevant levels and links of the TOC to which the findings refer have been highlighted.

⁵ For example: Tsui, J., Hearn, S. and Young, J. (2014) *Monitoring and evaluating policy influence and advocacy*. Working Paper. London: Overseas Development Institute

Figure 1: Theory of Change



3 Methodology

19. A brief overview of the methodology for the evaluation is presented below. Appendix 2 provides more detail.

3.1 Evaluation Framework

20. An evaluation framework was developed by the team at the outset of the assignment. The framework,⁶ based around the main questions outlined in the TOR, provided questions and sub-questions to guide enquiry, setting out the associated indicators, data collection methods and data sources for each evaluation sub-question. The evaluation framework was used for the development of all evaluation instruments and to guide reporting.

3.2 Desk review

Documentation

21. Documents provided by the GMR team and sourced through Education for Change's (EfC) internal library and systematic web searches, included GMR products, internal documents (management, procedures, financing, strategies etc.) and external documents (reports from other stakeholders on EFA). Analysis was conducted by the core team. A list of main references is appended as Appendix 4. National consultants also conducted a document review of material pertinent to their country case study, providing contextual reference and background knowledge.

Background papers analysis

22. Background papers for the reports from 2011-2014 were analysed by authors' institutional affiliation. The papers were accessed via the GMR website and titles and authors were manually collated and analysed in excel.

Media analysis

23. The GMR team provided web analytics data, including information on the website, downloads and social media. The data was analysed against relevant evaluation indicators. An analysis of Twitter and Facebook was also conducted, including a comparison against other similar organisations on followers/likes, content output levels and reach.

Distribution list analysis

24. The GMR team provided the evaluators with a copy of the GMR distribution orders for the 2013/14 report. An analysis was conducted of the standing order shipments: data was organised and analysed to generate summaries according to organisation type and country.

Launch analysis

25. The full list of GMR launches and events from 2009-2014 were taken from the GMR website and analysed according to location and event type.

Bibliometric analysis

26. All citations to each GMR since 2002 and each background paper were searched for within the Scopus database. Full citation information and information on citing articles was then downloaded and used to run a series of analyses: citation numbers by year and by report; country location of citing article authors (according to their affiliation); disciplinary fields of journals in which citing

⁶ See EfC (2014), 'External Evaluation of the Education For All Global Monitoring Report: Inception Report', Appendix 4

articles appear; the visibility and prestige of these journals over time (using SCIMago Journal Ranking indicator⁷); and textual analysis of citing article titles and abstracts.

27. A random selection of articles citing the 2010 GMR, amounting to 10% of total citations of that report, were also downloaded and analysed to gather information on the types of citations made to the GMR: where they appeared in the article, what was being cited (statistics, thematic analysis etc), why it was being cited and the importance of that citation to the article.

28. In addition, documents and reports from a sample of INGOs (Plan, ActionAid, Oxfam, Save the Children), multilaterals (GCE) and donors (DFID, USAID, SIDA) were analysed for numbers and types of references to the GMR. These documents were sourced from these organisations' online publications lists, selecting all documents since 2010 related to education or the broader themes of the GMR since 2002.

3.3 Engagement with stakeholders: global and regional

Interviews

29. Interviews, using semi-structured interview templates, were conducted by telephone and face-to-face. Respondents were selected from the GMR contact list, ensuring coverage of a wide range of organisations and types of stakeholders. In total 63 education stakeholders at international and regional levels participated in interviews for the evaluation.

30. Interviewers recorded detailed notes on a standardised reporting framework. Responses were then collated across respondents and analysed by evaluation questions according to the taxonomy of stakeholders (see Appendix 2). Due to the qualitative nature of the data and the analysis, and confidentiality agreements, breakdown of specific numbers, proportions or organisational affiliation of interviewees mentioning an issue was not always feasible and judgements have been made by the evaluation team according to the position of particular interviewees and therefore the significance of their views. However, efforts have been made to reflect the prevalence of issues across interview responses as far as possible. The list of interviewees is appended as Appendix 3.

Online surveys

31. Two online surveys were conducted, one for UNESCO field offices and one for education stakeholders (wider survey), both hosted online by Survey Monkey. The surveys were developed in English from the evaluation framework; the wider survey was professionally translated into French, Spanish, Arabic, Russian and Chinese and the field office survey into French and Spanish. Both surveys were subject to internal testing and piloting before being launched.

32. The wider survey was started by 506 respondents from 123 countries (see Appendix 2 for further breakdown of respondents according to the evaluation taxonomy of stakeholders). The UNESCO field office survey received 23 valid responses from 17 countries. Responses were downloaded and merged in SPSS for cleaning and analysis according to evaluation framework indicators.

33. The surveys included question logic to avoid asking irrelevant questions and maximise completion rates. In analysis, we removed respondents from a question if they were considered to have 'dropped out' of the survey (providing no further responses to any questions). Variables were filtered according to question logic. In presenting the results, percentages were calculated based on total number of respondents that were asked the question and had not dropped out, therefore including those that skipped the question (not responded to that question or option but responded to subsequent questions). Total number of respondents to each question, and the numbers of each type of respondent are included in the figure titles and legends/axes respectively.

⁷ <http://www.scimagor.com/SCImagoJournalRank.pdf>

Country case studies

34. Case study work was undertaken by consultants in the following countries: Brazil, India, Kenya, Lebanon, Russia, Senegal, UK (focus on England but with reference to Wales, Scotland and Northern Ireland) and Viet Nam. A research toolkit, including a typology of stakeholders and interview guides, was piloted in Kenya. Relevant materials were translated into French, Portuguese, Russian and Viet Nameese. National consultants were trained and provided with guidelines and materials to conduct the work. In each case the consultant worked with the UNESCO field office or National Commission (NatCom) to identify and contact respondents.

35. Consultants interviewed 147 respondents in total across the countries, with strong representation of all stakeholder types. Consultants submitted internal country reports based on a reporting template; the findings were collated and analysed by the core team.

Delphi survey

36. Two rounds of a Delphi survey were carried out. The purpose of a Delphi is to test emerging conclusions and recommendations, generating responses to iterate towards more detailed conclusions. 29 senior international education stakeholders, identified through the international interviews, were contacted to take part, of which 15 responded in the first round and 13 in the second round. Individual responses were reviewed by the core team and taken into consideration in the finalisation of conclusions and recommendations.

3.4 Limitations

37. Available documentation of GMR activities, procedures and processes was provided by the GMR team for analysis. However, many GMR activities and processes, and the nature of relationships with partners, remain undocumented, having evolved in a more fluid way on the basis of understandings between individuals or organisations. This raised significant challenges in attempting to establish and verify a clear picture of how the GMR has operated year-on-year and how this has changed over time. To mitigate the impact of this, the team sought to triangulate different sources, particularly from interviews with different stakeholders, but in some cases the lack of clear official documentation has made it difficult to confirm reported evidence that has come from only a limited number of informants.

38. The case study country selection was limited to the locations of UNESCO offices, as timing, logistical and funding limitations for the case studies required the assistance of local UNESCO staff to identify and gain access to high-level and relevant stakeholders. Within this limited set of locations, countries were selected in consultation with the GMR team to reflect a range of different criteria and experiences (coverage of GMR regions, geographical size, federal states, income levels etc), alongside consideration of the potential responsiveness of UNESCO field offices. However, this basis of selection has meant that the case studies only provide evidence on where direct outreach through UNESCO offices has been in place for the GMR, representing a 'best case' scenario in this respect. The triangulation with the wider survey is therefore important, but such surveys are limited in the depth of information they can provide.

39. The case studies were successful and a wide range of actors participated in consultations. Resource limitations meant it was not possible, however, for a member of the core team to work with national consultants. Any loss in understanding and coherence of findings was mitigated by the expertise of the national consultants, their training and materials and ongoing monitoring. In all countries, there was some level of difficulty in engaging respondents; where knowledge of the GMR was very low, high-level and busy respondents were reluctant to be involved. Notably in the UK, government and private sector actors working in national education were largely unresponsive: the GMR is seen as the business of the Department for International Development (DFID) and not of domestic education policy. In India, reaching state level actors was a challenge as UNESCO has little

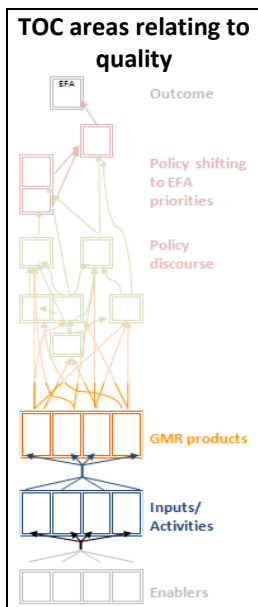
presence at sub-national level, though it was possible to connect with some respondents through the NGO coalitions. Overall, however, the support of the UNESCO offices and the persistent efforts of the national consultants resulted in a range of responses from which solid findings have emerged.

40. The wider survey was sent to a large number of people working in a range of organisations and countries. However, the majority of individual survey invitations (58%) were sent to the GMR contact list, and therefore by definition, to people with existing knowledge and interest in the GMR. This was to some extent mitigated by sending invitations to a wider list of E/C contacts and partners, and promotion on listserves and online forums etc. As with any survey, though, even these wider outreach activities are likely to attract those interested in and/or using the report. The relatively high number of responses reduces the bias, but, as with the case studies, it is likely survey results are somewhat biased in favour of the report.

4 Main findings

4.1 Value of the GMR

4.1.1 Quality of the GMR



41. The quality of the GMR relates to the lower levels of the TOC (see diagram alongside) and provides significant underpinning for the take-up of GMR products by stakeholders and the routes into policy discourse. Specifically, quality issues relate to how GMR enablers (finance, staffing, hosting, mandate) feed into GMR inputs and activities, how these inputs and activities are themselves designed and organised for the development of quality products, and how the quality (actual and perceived) of these products affects the likelihood of different stakeholders engaging with and using them.

42. Evidence was gathered on the following aspects of quality for the GMR and associated products:

- authority and clarity of writing and presentation;
- balance and comprehensiveness in their coverage of all the EFA goals;
- the range of research and analysis upon which the report draws;
- its alignment with current thinking in the education sector;
- accuracy and reliability of evidence; and
- rigour and independence in its data presentation and analysis.

Key findings for quality

The GMR is widely perceived to be a high quality report, based on robust research and analysis that has firmly established it as an important resource for the education sector. The GMR's ability to present complex data and concepts in useable and engaging ways both in the report and through other outputs is recognised and much appreciated.

Whilst the research and analysis is seen as rigorous, international and national stakeholders have identified a need for stronger, more structured consultation processes to widen the geographical representation and evidence base of the report. The constraints imposed by the tight production cycle for the GMR is one factor that has hindered improvements in this area.

Some national level stakeholders perceive the GMR as biased towards low-income developing countries and thus not as relevant to their middle- or higher-income contexts. At international and national levels relatively weak coverage of non-formal and private sector education is noted.

International commentators recognise the education data constraints with which the GMR has to operate and acknowledge the increasing efforts of the GMR to draw on new data sources in useful ways (particularly the WIDE database).

The GMR's independence is viewed as critical to the report's credibility and reputation. Its relationship with UNESCO is seen as supporting that independence. For stakeholders at national levels the constituency and structure of UNESCO confers on it an assurance of impartiality.

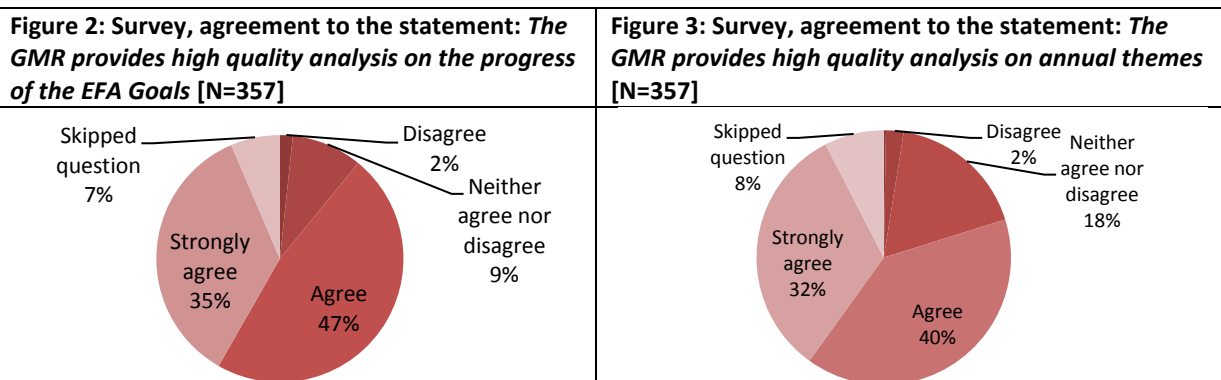
The GMR has maintained a delicate balance between its monitoring role and communicating/advocating around its key messages. Some international interviewees from INGOs, research and multilateral agencies have raised a concern that the GMR has come increasingly close to tipping that balance through pushing more methodologically challenging global figures for advocacy messages. Whilst these have stimulated valuable debate, these interviewees have raised a potential risk to the GMR's reputation for credible and impartial analysis should this advocacy trend go much further.

Authority and clarity of presentation

43. The majority of respondents from international interviews, country case studies and the wider survey who are aware of the GMR, regard it as a central document for the education sector with many international interviewees stating that there is no other publication in education or, indeed, in other sectors, comparable for level of authority, coverage and reliability. Many interviewees from INGOs, bilaterals and research organisations referred to the GMR as one of the, if not *the*, primary reference document they would turn to for information on the education sector.

44. The quality of the report’s analysis is perceived as very high across all types of survey respondents, although slightly less so in terms of the annual theme compared to EFA progress reporting (Figure 2 and Figure 3). This is supported by the majority of international interviewees who noted that where the GMR themes were cross-cutting or cross-sectoral (such as marginalisation or conflict), the GMR provided a useful summary of how these themes affected education and raised the profile of the issue. Perhaps inevitably, there were some comments from more specialised agencies that in such cross-sectoral themes the GMR had not captured all the nuances of the discourse, but this is recognised as extremely difficult to achieve writing at a global level for non-specialists in these areas; what the GMR team achieves within their research and publication timelines is highly praised by nearly all international interviewees. Indeed, in most international interviews, in some country case studies (

45. Box 1) and the survey, respondents indicated that the quality of analysis was such that it remained relevant and useful as a resource over a number of years: 30% of the survey respondents, for example, stated that the 2005 GMR was in their top three most used GMRs in the last year.



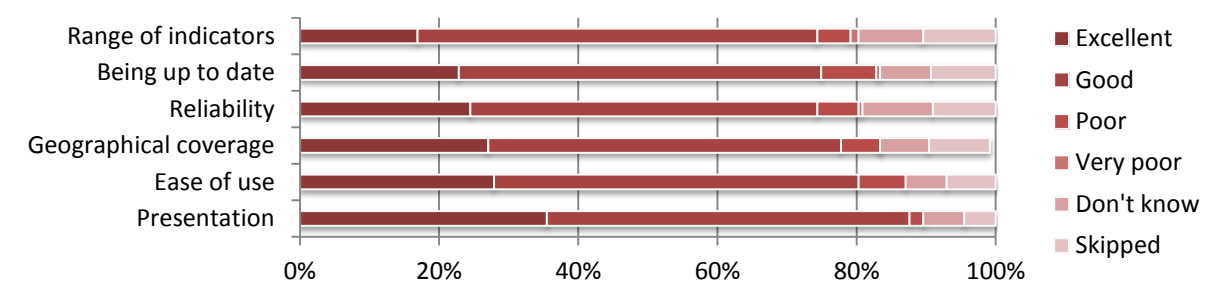
Box 1: India

Despite some issues and challenges around data, national and state civil society actors stated that they used the report because it was good quality, and, as an international publication, added weight to any argument they were making. It is considered well researched and robust. Some respondents said that the role of the GMR was not to have the latest and most accurate figures, but rather to “set the tone” on the discussion on education and international development, show trends over time and maintain high quality in the discussions, all of which it is considered to do very well. Informants agreed that the reports are well produced, visually attractive, well written, contain clear messages, and stand the test of time; the language used is education- and human-rights based. Respondents felt strongly that themes were very useful and provided a good vehicle for discussing issues, and they were extremely relevant to the Indian context.

46. The GMR’s ability to present complex data, ideas and analysis in accessible and engaging ways is widely recognised and commended amongst both international and national interviewees (where they were aware of the GMR) across all types of organisations. Messages and analysis are consistent and coherent across the portfolio of GMR products, and new outputs over the last few years have complemented the report with authoritative evidence presented in different and engaging ways. The range of materials other than the report itself, which promote its key messages and information

accessibly, and that support advocacy campaigns by other stakeholders, is considered impressive and useful by the majority of international interviewees. For example, the policy paper series and the infographics series, begun in 2011, were often cited as innovative in translating data into more understandable formats and highlighting issues. This was supported by survey respondents who rated the ease of use and presentation of data highly in comparison with other education data sources (Figure 4).

Figure 4: Survey responses to: Thinking about the other education data sources that you use, how would you rate the GMR data on the following aspects? [N=355]



47. The language used in the report itself was generally noted to be accessible by most interviewees, but a few international NGOs and multilateral interviewees and more national interviewees felt that it tended to be rather academic, prompting some queries as to how accessible the analysis and narrative might be among different kinds of readers (e.g. those reading in a language not their own). However, more recent reports have, on the advice of the Advisory Board to “demonstrate the aim, usefulness and importance of the GMR to a wider audience”,⁸ made efforts to adopt an approach in which its messages are “communicated in an interesting and accessible way that captures the attention of education specialists, decision makers, the media and wider public alike” through different communication channels and products (see section 3.1.2). This was recognised amongst international interviewees although at national levels the awareness of these communication channels amongst interviewees was low.⁹

Appropriate balance in coverage and progress of all the EFA goals

48. International interviewees and survey respondents generally felt that the GMR has been balanced in its coverage of the progress on each of the EFA goals, with 85% of survey respondents saying it has been effective or very effective in charting progress and mapping trends against all six EFA goals and targets. There are widely recognised challenges for the GMR in monitoring progress against some of the EFA goals because of data constraints and poorly defined indicators and definitions (for instance around youth and skills, literacy and quality).

49. The annual theme, selected after consultation with the Advisory Board, has provided a means for the GMR to explore and develop ways to address some of these data, indicator and definition constraints around the EFA goals by providing more in-depth analysis and suggesting new frameworks, indicators and approaches to charting EFA progress in these areas.

50. A strong majority of international interviewees considered that the thematic analysis has been more interesting and useful in recent years by its expansion beyond the specific goal areas to more cross-cutting and cross-sectoral themes that affect all goals (e.g. governance in 2009, marginalisation in 2010, conflict in 2011). Several commentators from non-education specific INGOs would have liked to have seen these cross-sectoral elements rather more consistently addressed in each annual report, although the delicate balance between depth and breadth of content in such an already lengthy global report was recognised.

⁸ Advisory Board meeting minutes 2010
⁹ Ibid, GMR Director

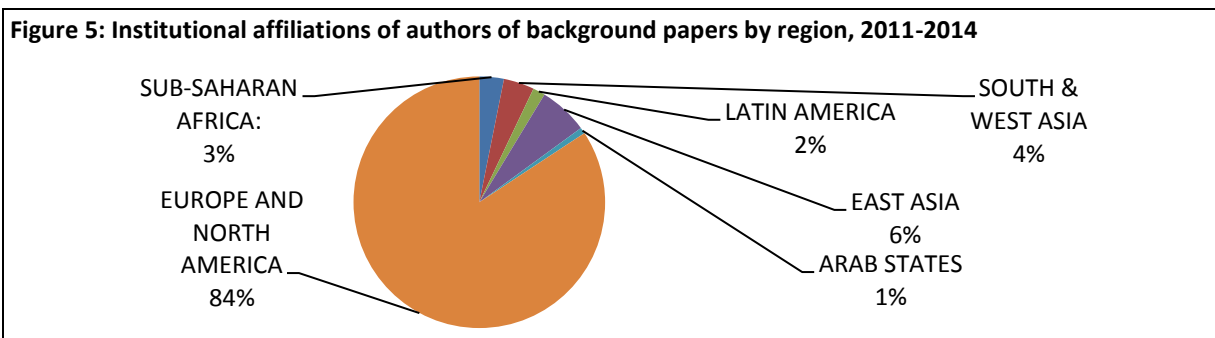
Range of research and analysis upon which the report draws

51. The GMR has drawn widely on existing literature as a basis for developing the report content and focus, with extensive literature reviews undertaken by the GMR team: it is recognised that these sources of literature are dominated by English language publications and research organisations in the global North. Once the extended outline of the forthcoming GMR report has been prepared, identified gaps or weaknesses in the literature are noted and background research papers are commissioned to fill them or strengthen areas of analysis. Relevant researchers and experts are identified through prominent names in the literature and the GMR team also uses its own contacts and networks. Whilst attempts are made to find authors from the countries that are the focus of analysis (whether located there or elsewhere) this can be difficult, and two important criteria drive the search for contributors: the researchers must be already working in the areas for which gaps in existing research have been identified in order to fit into the tight timetable for the GMR and its cost constraints; and they must be available for quite intensive work over a short space of time.

52. There is substantial input by the GMR team to reading, commenting and editing drafts of commissioned papers and the resulting papers may then directly or indirectly feed into the analysis and content of the final report, although some may not be used at all.

53. This process has enabled the GMR to identify and analyse trends, discourses and concepts in relation to the specific theme and several international interviewees from INGOs, multilateral and research organisations noted that the commissioning of research through the background papers was invaluable (albeit not a role intended in the GMR’s mandate) as there are few other sources of funding to stimulate such focused research in the education sector. They note that through this kind of commissioning the GMR has potential to build research capacities in all regions of the world, and a greater promotion of the resulting papers by the GMR to raise awareness of them as a more specific national/regional resource would be valuable.

54. However, the process of identifying and commissioning papers (there have been over 500 papers commissioned to date) has been questioned by several international interviewees from INGOs and multilateral agencies (including some who had contributed background papers themselves) as lacking in transparency and coverage. The GMR team approaches potential authors directly using terms of reference developed for each specific piece of work; it does not formally tender the work because in many cases individual papers come below the cost threshold for public tendering, there are tight production deadlines and there can be a substantial bureaucratic overhead of tendering through UNESCO systems. There is no documented standard set of quality criteria so there are different emphases and issues relating to quality to consider every year. The tight annual production schedule and the relatively small size of the GMR team militate against systematic efforts to widen the range of research contributors. One result of this is poor representation of the global South in research inputs to the GMR: analysis of background research papers indicates that the papers are largely drawn from research organisations in the global North (Figure 5), although authors themselves may originate from different places.



55. The GMR team acknowledges that this is a concern and makes efforts to broaden the input, recognising that the report would benefit from a wider network of research institutes that would go

some way to mitigating the challenge of finding good, reliable authors in certain regions. However, they lack the staff resources for developing and maintaining such an international research network.

56. Literature reviews and commissioned research have been complemented by some wider consultation in recent years, in response to the 2009 evaluation recommendation (Recommendation 3) that the GMR should develop a more directed early stage approach to consultation with developing countries. The GMR has held online and email consultations on the annual theme, and direct contact with projects and stakeholders who are known in the field or who are prominent in the literature (Box 2). For the 2012 *Youth and Skills* report, for example, the GMR team reached out widely for external contributions and consultation that fed into the report's content. The GMR Management Report states that "the GMR team contacted relevant partners who both helped in providing evidence on successful programmes, as well as supported advocacy and outreach activities. These included the MasterCard Foundation, CAMFED, BRAC, Save the Children, the International Youth Foundation, the European Youth Forum, OECD, the Sawiris Foundation, IFAD, the World Bank Youth Think Thank, the Africa Progress Panel and more".¹⁰

57. However, the level, reach and awareness of online consultation processes have been limited (39 online responses to the 2013 consultation process and 45 to the 2012 process, some of these representing agencies or wider networks), and there is a widely held opinion among interviewees from all types of organisations, at international and national level, that the GMR would benefit from more structured and accessible consultation prior to a report on themes, issues, examples and ideas from a wider range of perspectives. It is recognised, however, among Advisory Board and international development partners that the current tight annual production schedule and team capacity limits opportunities for wider and more structured consultation without significant additional resources or support from other agencies. This has been an intractable problem that was noted in the 2009 evaluation: "comparator reports, such as the HDR [Human Development Report] and WDR [World Development Report], have gone some way towards expanding the level of public consultation of their reports, with regional coverage of consultations intended to seek comments, advice and suggestions...It should be noted, however, that both the HDR and WDR benefit from more extensive supporting institutions with a significant global presence, unlike the Report Team, which operates under a less official arrangement with UNESCO...Moreover, the WDR operates on a two-year cycle, which allows for more time to develop early concept notes and incorporate feedback in the process".¹¹

58. The broadening of advisory inputs and review of the assessment of data sources, thematic analysis and policy-oriented conclusions, was also commonly noted as an area for possible strengthening amongst international interviewees across different types of organisations, especially when the GMR deals with more specialist areas (e.g. skills) or cross-sectoral issues (e.g. marginalisation, conflict). The GMR does have a small Expert Group for each report that feeds into the report development (including a review of the zero draft) but the range available within this group (both in global representation and thematic perspectives) is inevitably limited. Again, the requirements of tight production deadlines and the need for efficient turnaround of comments and reviews has been an important factor in the development of existing arrangements.

Box 2:

Lebanon

UNESCO field officers reported a direct communication link with GMR team. As the Regional Bureau for Education in the Arab States, draft GMR reports are sent to them as a focal point in EFA. They edited the Arabic version of the Youth and Skills report, contributed to the report on marginalisation, and had contact with UIS in regard to data.

¹⁰ Management report Jul-Dec 2012

¹¹ Universalialia (2010) Evaluation of the Global Monitoring Report Final Report. Volume I p.14

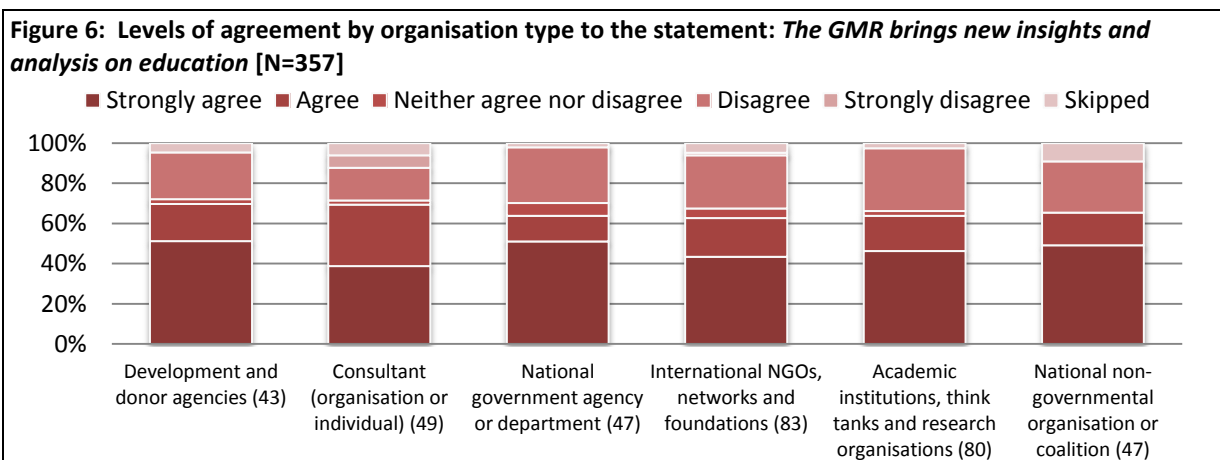
India
 One of the government stakeholders was aware of the online consultation process for next year’s report and had participated. He had also been involved in previous, global discussions about the report and the best way to launch it. None of the development partners, NGOs or researchers, however, were made aware of the themes of forthcoming reports. There was a general feeling that there should be more consultation in advance of reports, bringing together the CSOs and/or development partners and/or researchers and the government to discuss and resolve issues, particularly in the context of a changing landscape, with development partners having less money and therefore less power (particularly in India) and the rise of the private sector.

UK
 The UK NatCom for UNESCO felt that thematic consultations and direct links with the GMR team (in particular the Director) enabled UK educationalists to be involved in developing the GMR and this added to its credibility. The NatCom visited the GMR team in mid-2012 as the 2013/4 theme discussions were starting. The Education Director then led a UK consultation, producing a policy brief. They were pleased that their information was taken into consideration and that the UK response had been influential.

Alignment with current thinking in the education sector

59. At an international level, there is a strong consensus across all interviewees that the GMR is very well aligned with current debates and issues in the education (and development) sector, and that it has been able to respond to new trends as they emerge. Examples include the GMR’s engagement with post-2015 debates through its post-2015 online ‘hub’, its selection of cross-cutting themes over the last five years, and the introduction of the WIDE database that has been cited by international interviewees as a useful resource in the growing focus on equity considerations within education.

60. Notably, in a number of instances, the GMR is identified as having been a leading influence in raising specific issues and trends onto the international agenda. The 2007 report on early childhood care and education (ECCE), which was described by one international NGO interviewee as having “really accelerated progress and shifted the debate in this area”, and the 2011 theme on conflict were commonly cited examples amongst international interviewees from all types of organisations. This is supported by the survey, in which 74% of respondents felt that the GMR was effective or very effective in alerting the global community to emerging challenges, with high levels of agreement to the statement that “the GMR brings new insights and analysis on education” (Figure 6), although this was lower amongst international and national NGOs and consultants.



61. At national levels the relevance and alignment of the GMR to education priorities is relatively high across all regions (lowest in Central Asia, but the low level of respondents from this region means this data must be treated with caution)(Figure 7 and Figure 8). It is not possible for a global report to align with education priorities in every country, but evidence from the country case studies

indicates some perceptions of bias towards education in developing country contexts and targeted at development audiences (Box 3).

Figure 7: Survey responses to the relevance of the GMR to the education priorities in the countries in which respondents work, by region [N=332]¹²

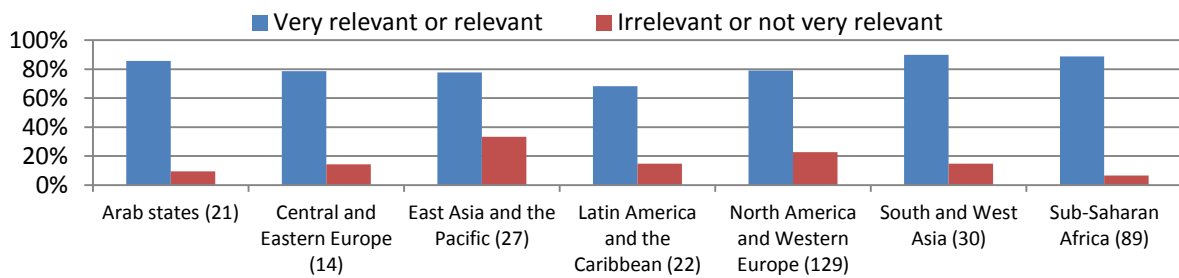
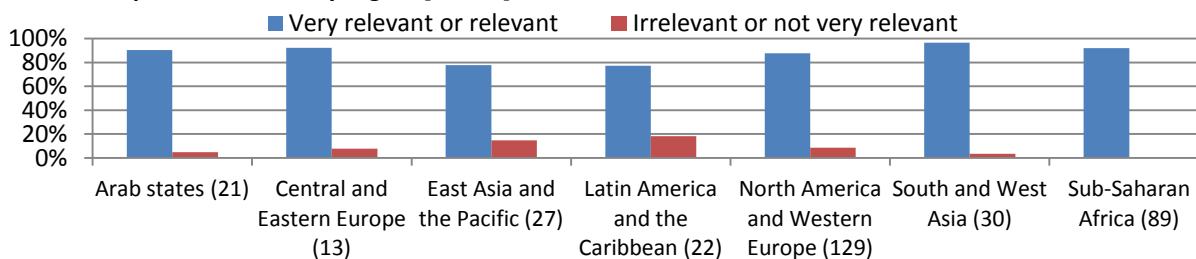


Figure 8: Survey responses to the relevance of the GMR themes to the education priorities in the countries in which respondents work, by region [N=331]



Box 3:

Russia

Almost all respondents in Russia consider the GMR an authoritative, rigorous and independent publication in its presentation of data and analysis. The only areas of concern were in regard to the coverage and relevance – respondents felt that the report primarily targets less developed countries, and therefore presents data and examples from just a small sample of countries.

Russia provides free and compulsory education and is close to achieving universal primary and secondary education, with very little adult illiteracy. Despite surpassing the EFA goals, there are still challenges. The most marginalised children continue to be excluded: orphans, disabled children, children from single-parent families, families with and low socio-economic status. Migrant children, usually from less economically developed countries and often in Russia illegally, have particularly low participation in education. Respondents in Russia felt that the GMR pays insufficient attention to these issues and how to address them. Though it is clear that the GMR draws on a wide range of research and analysis, respondents stated that research from Russia is very limited, and most of the problems described in the report are not relevant.

Lebanon

Though the report is regarded as high quality, some actors felt that the report did not accurately reflect the realities of the Arab world, whilst others highlighted that it was perhaps more targeted to low income countries in Africa than middle income countries such as Lebanon. Some respondents said that the report did not keep up with current trends, perhaps because of its focus on EFA. Development agencies, in contrast, stated that it shapes thinking in education and sets the trends, and Ministry respondents stated that recent themes had reflected national concerns and issues in education (conflict, teachers, youth and skills etc.).

¹² Central Asia has been omitted from Figure 7 and Figure 8 due to low response rate (less than 10).

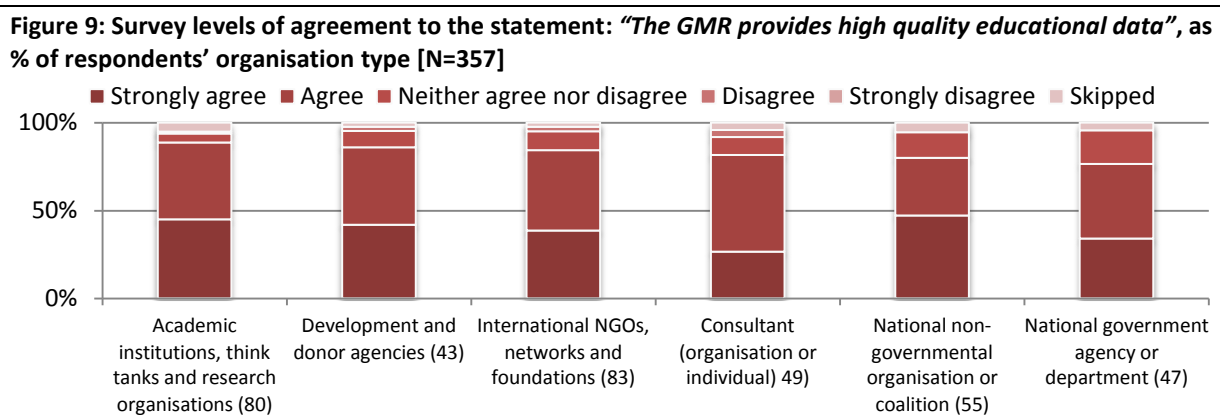
62. On this theme of global and national alignment several international interviewees (from multilateral agencies and INGOs) expressed the opinion that the GMR has over the years continued to take a rather traditional view of education (for example, a very traditional line on quality, and overall weak coverage of non-formal education) without questioning too closely the model it implicitly advocates. This is perhaps a reflection of the emphasis and structure of the EFA goals themselves, but systems of non-formal, religious and low-cost private education were noted by several international interviewees and in some of the case study countries as being poorly covered within the GMR (Box 4). In this context it is relevant to note that the GMR is driven primarily by data sources which are framed by a traditional model of education, and by literature reviews of research published in an international scholarly publications system that draws very substantially on established sources peer reviewed and published in the global North. The report’s content development has also been supported by an Expert Group with members drawn largely from the same established Northern research organisations.

Box 4: Senegal

Many national respondents felt that the data in the GMR omits a huge part of the education sector. The “Daara” schools, Senegal’s Quranic schools, constitute a non-formal system which is attended many Muslim children, and recognised by national stakeholders as a valuable contribution to the education sector. Experts raised questions as to whether the GMR is reporting only on formal education or on “education” in general.

Providing accurate and reliable evidence

63. The consensus among international interviewees is that the GMR is as accurate and reliable as it is possible to be, given the international education data that is available and the quality and validity of data provided by some countries (issues which the UIS is addressing as part of their mandate to collect data from UNESCO Member States). 74% of all survey respondents rate the reliability of the GMR’s data (in comparison with other education data sources they use) as either excellent or good and there is widespread recognition of the quality of the data used (Figure 9). International interviewees also noted that through its annual reporting the GMR has built a demand for the improvement of international education data and highlighted gaps that have been important for advocacy organisations to pick up on.



64. Of more concern is that the data in the GMR can be up to two years out of date, due to a combination of the UIS timetable for updating and standardising country data and the production lead time for the GMR: the 2013/14 GMR (launched in January 2014) uses data for the school and financial years ending in 2011. It was recognised that this was an issue beyond the GMR and the production lead time for the GMR would be difficult to shorten any further whilst maintaining the quality and rigour of the report. A number of international interviewees commented on the need for the education sector as a whole to be able to process and present data more quickly to keep up with other sectors, such as health, particularly in changing post-2015 frameworks.

Box 5: UK

In general there is no concern over accuracy and reliability; a range of stakeholders expressed great confidence in UIS and GMR. There is recognition of the challenges in collecting country data, and a value in highlighting where data does not exist to advocate for improvements.

65. However, whilst national level survey respondents were generally positive about data within the GMR, country case study evidence shows a more complex response. Not all stakeholders are aware of the role of UIS in sourcing data, so shortcomings (or adjustments required for international comparability of data) can be perceived to be faults of the GMR itself (Box 6).

Box 6:

Viet Nam

The government of Viet Nam disputed the 2008 report because of the data presented on school drop-outs, which differed from the Ministry of Education and Training's figures. This was caused by different methodology for counting the school age population, and UIS had a higher figure for the population. However, the data conflict has resulted in missing data in subsequent GMRs, and there have been no public launches of the report since then.

India

The government do not use GMR data because it is out-of-date and they have annual education data generated by a government institution which is thought to be more reliable and current. Some advocacy organisations said they wouldn't use the GMR data because the government don't trust it, so would instantly be able to disregard anything they were saying; they are on much safer ground using official statistics. Some members of civil society and research bodies said that didn't trust the data in the GMR *because* it was government data, which they regard with suspicion. There are a number of data sources in India, and even official sources contradict each other.

Kenya

In general, respondents do not trust data that comes from government. At one launch, evidence presented from the GMR was strongly disputed. In addition, data presented is seen as out-of-date – at least two or three years' old – by some stakeholders (largely government stakeholders) who are therefore not interested in using it.

66. The GMR is not mandated to focus on individual countries and no global report could give a sufficiently detailed and accurate view of a single country's progress towards EFA. Political contexts and complexities of data definitions, processing and analysis make a degree of disagreement about data inevitable. Nonetheless, the fact that the data used by the GMR is felt not to present the country situation accurately by interviewees in most of the eight country case studies, and that this is seen as a reflection on the GMR itself, appears to be an important factor in its perceived relevance and use at national level (a risk to the TOC pathways from the uptake of GMR products into policy discourse).

67. The GMR has drawn on an increasingly wide range of different, non-UIS data sources and types of data to overcome some of the data constraints and triangulate data both for national and regional level analysis (such as the use of the Annual State of Education Reports (ASER) in India and Pakistan in the latest GMR, or the development of the WIDE database using Demographic and Health Surveys and Multiple Indicator Cluster Surveys from over ninety countries). This has been recognised by the majority of international interviewees as a growing strength of the GMR, which enables it to fill data gaps and provide more nuanced analysis of trends as well as identify other interesting regional or national issues.

Rigour, independence and impartiality

Rigour

68. The GMR team follows established research, drafting and production procedures and has adopted high editorial standards that have resulted in extremely thorough and careful presentation

and analysis of EFA monitoring data and the annual report themes. This level of rigour is acknowledged and highly valued: at both international and national levels the strength of the evidence-based analysis is largely praised (even if specific parts of national level data are questioned) and is seen by the majority of interviewees as a basis for the report’s credibility in the sector.

Independence and impartiality

69. The GMR is generally perceived as independent and impartial amongst both international and national interviewees and this is identified as strengthening its reputation and encouraging its use at these levels. The institutional arrangements (roles, responsibilities and practices) between UNESCO and the GMR, and the working relationship between UIS and GMR, whilst largely undocumented, are effective and support GMR’s operational and editorial independence.

70. International interviewees widely view the GMR-UNESCO relationship as an important factor in preserving the GMR’s independent voice and members of the Advisory Board noted the importance of the GMR’s editorial independence from UNESCO as key to the report’s credibility. This allows the GMR to be bolder than UNESCO itself could be in its analysis and recommendations. As the report goes out under the UNESCO name, press releases related to the GMR are vetted by UNESCO’s Director-General looking at issues such as how Member States are referred to (e.g. avoiding direct and open criticism), but the choice of the report’s content is the sole responsibility of the GMR team, in consultation with the Advisory Board. In practice the Director of the GMR has overall editorial control and each Director has been rigorous in their successful defence and maintenance of the independent voice of the GMR. This is evident in feedback on, and reactions to, the report’s messages after every launch during the last three years, and recognised by the majority of international interviewees.

71. Amongst many country case study respondents and some international interviewees, the distinction between the GMR team and UNESCO is not clear and the report is simply viewed as a UNESCO product. The close association with UNESCO is generally seen by these respondents as supporting the perception of the report’s impartiality due to UNESCO’s reputation for neutrality, objectivity and freedom from domination by any single country agenda (Box 7).

Box 7:

Brazil

The quality of the GMR is considered high by all types of stakeholders at all levels. Even those who don’t know the report well still consider it to be highly trustworthy. The reputation of UNESCO and its products are also considered an important factor in the report being a trusted source, seen as neutral and objective.

Senegal

Even if the collection methods or data calculation can be challenged, a certain degree of confidence is given to the GMR due to its link with UNESCO.

Kenya

Although some of its analysis has been questioned by some users, the UNESCO stamp of authority on the report makes many readers accept its integrity.

Balance between monitoring and advocacy

72. A further important factor in the report’s credibility amongst international interviewees, and to a lesser extent amongst national level interviewees, is the extent to which it maintains a balance between its mandated independent monitoring role (to provide evidence for others to advocate for EFA) and actually advocating on the basis of the evidence it presents. This balance has been a subject of discussion in the Advisory Board for several years. In 2010 the Board agreed that the GMR

at the time struck a good balance between monitoring and advocacy.¹³ Board members were aware then of the need for the report to remain “objective and academic” while providing evidence-based analysis that “could influence policy directions and help fuel advocacy efforts, including at the country level.” In 2011 they appear to have moved more decisively in the direction of advocacy: “Board members highlighted the need for the Report to have few, strong messages, including controversial statements to engage debate”.¹⁴

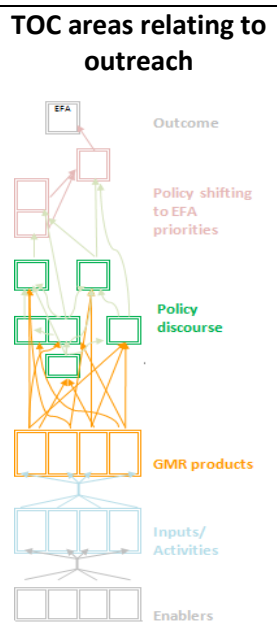
73. The balance between monitoring and advocacy in the report since 2010 was raised specifically as a point of concern by ten of the international interviewees (coming from INGOs, research and multilateral organisations). These commentators identified the challenge in keeping the fine line between providing impartial monitoring evidence and advocating on specific issues, and that the emphasis on advocacy messages by the GMR in recent years had taken them closer to that fine line. There was concern that this trend could tip the delicate balance between monitoring and advocacy in the future, with risks to the report’s credibility as an independent and impartial assessment of EFA progress and annual themes. The GMR team are well aware of the risks when they produce a piece of research and analysis with key messages that are clearly to be used for advocacy and consider it essential that they can always support such messages with robust and high quality evidence. Extrapolating high-level figures such as the recent numbers in the latest GMR for the global financing gap and domestic tax resources, and the number of children not learning basic skills, is challenging (and more open to challenges) methodologically. The GMR team acknowledged this risk but stressed that the points served were sufficiently important to raise awareness of these issues and that doing this kind of advocacy themselves allows them to keep control of, and retain as far as possible (at least at international levels), a solid link between the advocacy message and defensible evidence. The key messages were certainly picked up internationally and sometimes controversially, eliciting the kind of responses that the GMR sought. However, this is a delicate balance in its effect on perceptions of the credibility and impartiality of the GMR (a perception of pushing the evidence for key advocacy messages) and, in turn, its uptake and use.

74. The visibility and authority of the GMR means that it is seen by many as the main advocate for the EFA goals. UNESCO itself cannot do this kind of “tough advocacy” because of its mandate and structure, so UNESCO education sector’s approach to advocating for EFA has been more by persuasion and exposure of key stakeholders to issues and dialogue through coordinated events and meetings, to maintain the momentum towards achieving EFA. It uses the GMR as one of the key sources of evidence and advocacy within this. Many international interviewees voiced the opinion that the GMR had been gradually stepping into the direct advocacy for EFA role, some seeing this as positive for the EFA movement, but others raising a concern about the effects of this kind of advocacy (rather than raising awareness of the GMR) on the GMR’s reputation for impartiality that makes the report useful to advocacy organisations.

¹³ Advisory Board meeting minutes 2010

¹⁴ Advisory Board meeting minutes 2011

4.1.2 Outreach



75. The outreach of the GMR relates to the central links in the TOC between the GMR products and stakeholders involved in the policy discourse. It focuses on the various means through which these stakeholders receive, and are made aware of, the GMR products. Understanding the extent of access to products and the types of stakeholders receiving them is an important precursor to the next TOC level, policy discussion. Only if a critical mass of policy actors is being reached can the GMR expect to influence policy. It is important, therefore, to examine all the target audiences and reach ‘arrows’ on the TOC for strengths and weaknesses.

76. The evaluation considered the outreach of the GMR from two perspectives:

- Whether the GMR has effective communication and dissemination strategies in place for its different audiences; and
- The actual reach of the GMR through different channels

Key findings for outreach

Overall, awareness of the GMR is high amongst international stakeholders but at national levels limited access has meant that awareness of both the GMR and other GMR products is low.

The GMR has expanded its communication and dissemination channels since the last evaluation in 2009, and some communication channels in particular have been very successful. However, there is no overall dissemination strategy that draws together all the channels of GMR dissemination and communication and considers their use strategically in terms of their ability to reach and influence disaggregated target audiences.

Distribution of at least half of the hard copies of the GMR relies on UNESCO field offices that rarely have strategies in place to ensure that copies reach key stakeholders. This is a particular challenge in regions covered by only a few field offices. The UNESCO network leaves significant geographical gaps in distribution, notably in Eastern Europe and Central Asia. Distribution direct to other stakeholders, which is based largely on requests for copies, is strongly concentrated in Europe and North America. Soft copies are also more likely to be downloaded in high income countries

The international GMR launch has been well managed in recent years to create a ‘big splash’ and maximise media attention, with media coverage globally expanding significantly year on year around each launch. However, reliance on UNESCO offices to initiate, organise and build on the national launches has resulted in widely varying degrees of effectiveness (in terms of raising awareness amongst key policy audiences, stimulating debate and distributing the GMR), despite efforts by the GMR team to strengthen their inputs into these events.

In press and social media coverage the GMR have excelled in recent years. Global press coverage is significant and the GMR has established a strong social media presence, with regular quantitative monitoring of their reach through these channels. The reach to specific target audiences involved in policy discourse and the influence of such social media reach, however, is less clear.

International partnerships developed by the GMR team for each individual report have strengthened both the consultation opportunities with core groups related to the report’s annual theme (youth in 2012 and teachers in 2013/14) and advocacy work by partner organisations around specific parts of the report.

Within academia, citations of the GMR have risen significantly since 2009: authors located in South East Asia, Latin America and Central Asia are conspicuous by their absence, however.

Communication and dissemination strategies

77. The 2009 GMR evaluation made a number of recommendations for strengthening the GMR's communications and dissemination, which matched growing calls from donors for more and better evidence on outreach and a general consensus among the GMR team and Advisory Board members that they should do more in this area to expand the reach of the GMR messages. This has stimulated increased focus on communications and outreach over the past few years with a wider range of communication tools and channels being introduced.

78. Communications and outreach strategies have been prepared for each of the last two reports (2012 and 2013/4) to strengthen planning. The two annual strategies state both top-level and specific objectives, some of which are dependent on the thematic content of the GMR in that year. However, the links between the objectives, the targets set for increased media reach (number of Twitter followers, number of media articles linked to the GMR etc.) and the planned actions remain an area for future strengthening (identifying measurable, time-bound objectives, linked outcomes, linked outputs with disaggregated target audiences related to the objectives for each etc.) to ensure a clear pathway from actions to impact. Whilst quantitative measures (i.e. number of reports distributed, number of events and products etc.) are now reported to the Advisory Board and donors, the reporting does not go beyond the output level to consider reach through different channels to meet specific objectives or the influence on the different target audiences identified in the communication strategy for that report.

79. The recent annual communications strategies have been developed through continuing discussion and exchange of ideas between the Communications Specialist and the Director, and have been adapted to meet changing circumstances during the year, as new players and partners emerged while the report was in production. This ongoing, year-by-year, planning thus provides the flexibility to respond to the communication opportunities presented in that year and by that report's theme. However, communications and outreach planning does not sit within a wider, medium-term strategic plan for the GMR programme of activities, that would, for example, articulate annual plans with the overall mandate of the GMR (the strategy for the 2012 GMR for instance, has no mention of EFA in either its objectives or activities) and within an integrated medium-term development of different activities (communication, distribution, research) to reach disaggregated target audiences for EFA monitoring and advancement. This kind of underpinning, longer-term strategic planning (looking further ahead than one year) has been constrained by the GMR's continuous roll of research and production deadlines and its limited staff resources.

80. In the 2009 GMR evaluation, recommendation 2 called for targets to be established for distribution, particularly for key audiences, and suggested that "a more detailed dissemination strategy based on estimates of user groups, and the planned outreach to each type of user group (government policy-makers versus media) may be considered, with measurable targets for monitoring purposes".¹⁵ In response, the GMR team reported that it has "developed a new distribution strategy to increase efficiency and reach target audiences better".¹⁶ However, the latest distribution strategy (2013) deals exclusively with physical distribution of printed copies of the GMR and could more accurately be described as a distribution list summary. It could be strengthened significantly by, for example, setting objectives or targets for distribution of hard copies with a rationale as to who would most benefit from these (and justifying the costs), integrating the dissemination and promotion of soft (electronic) copies and other products in targeted ways, and differentiating dissemination approaches for target audiences.

¹⁵ Universalis (2010) Evaluation of the Global Monitoring Report Final Report. Volume I p.37

¹⁶ Management report Jun-Dec 2011

Target audiences

81. Broad target audiences were defined in the 2012 and 2013/14 communication strategies and in 2013/14 were related in part to the theme of that year’s GMR. However, only top level audience groups are identified (e.g. civil society, governments in developed and developing countries, governments/policy-makers etc.), and the key messages and communications activities in the annual plan are not generally linked to, or differentiated by, the identified target audience.

82. There are some exceptions to this, with the policy paper series being targeted at specific meetings for policy-makers in the 2013/14 strategy, and a version of the GMR written and designed specifically for young people was produced in 2012 to complement the youth and skills theme of the GMR itself: 2000 hard copies were distributed among youth networks and organisations and it was translated into French and Spanish.

83. In 2012 the GMR also commissioned research to gather the views and attitudes of young people (aged 15-24) on the skills they need to gain access to work. The result of the research, consisting of quotes and transcripts of focus group discussions, contributed to the 2012 report (*Youth and Skills*) and was used for outreach purposes. This was continued in 2013/14 with the solicitation of teacher views (through an online questionnaire and a partnership with VSO) and provides a basis on which the GMR can build stronger background audience research to underpin the content, communications and outreach of the GMR.

84. It was recognised amongst a majority of international interviewees that the GMR is attempting to engage with a challengingly broad range of audiences (general public, media, civil society, donors, government policy-makers etc.), with some suggesting that more strategic targeting of products and dissemination routes to specific policy audiences (including those beyond the education sector who influence education policy such as finance ministries) would strengthen the influence of the GMR within policy discourse. There have been efforts by the GMR to bridge some cross-sector policy gaps in the latest GMR with the *Education Transforms Lives* booklet and the work on domestic education financing which has been widely welcomed by international stakeholders.

Distribution of the report

85. The GMR team decides to whom hard copies of the reports and summaries should be sent and develops and manages distribution planning, while actual shipping and mailing is done by a contractor. From the start of the GMR, UNESCO field offices were identified as the primary distribution channel of hard copy reports. According to the 2013 Distribution Strategy about 58% of the total numbers of reports and summaries are shipped to UNESCO field offices for local distribution: similarly in 2012 approximately 50% of the printed full GMR reports (in all languages) were sent to UNESCO field offices. However, evidence from the case studies (Senegal, Viet Nam, Brazil, Lebanon, UK and Kenya case studies (see examples in Box 8:)) suggests that most offices do not have strategic methods for distribution, resulting in hard copies of the GMR failing to reach key influencers or be available within key organisations in sufficient quantities to meet demand.

Box 8:

Senegal

The regional UNESCO office in Senegal does not have a promotion strategy or criteria for distribution. All UNESCO staff receive the report summary, and provide some copies to the NatCom to distribute, but the process is not systematic. Other copies are shared through the report launch, which has limited participation. CSOs and coalitions, including those heavily involved with advocating for and defending EFA goals, are not targeted and feel isolated from the GMR dissemination process.

Viet Nam

There seems to be no effective communication and dissemination strategy to reach different audiences. Many of the government respondents said that they have never received a GMR,

including those working in departments directly linked to recent themes (human resource development, TVET), and many were not aware of it. There are few copies available in the field office, and language is a huge barrier to access. Since the dispute about the data in 2008, there have not been GMR launching events, further limiting the awareness and use amongst government and non-government officials.

Lebanon

The GMR report has not been well disseminated amongst stakeholders. The Ministry of Education receives one copy, NatCom one or two, development agency personnel, if they themselves have copies, receive them from their headquarters, and researchers do not receive copies unless they personally request them.

86. In the UNESCO field office online survey (23 respondents from 17 field offices), responses from seven field offices stated that they have a distribution strategy, five did not; ten field offices reportedly have a distribution list but, of those, only six stated that it was updated each year. Others did not know or skipped the question. At best, this points to a lack of consistency on the effectiveness of distribution at country level.

87. Reliance on UNESCO offices (of which there are 52 globally) for national distribution therefore constrains distribution significantly, particularly in areas where field offices are thin on the ground (such as in Eastern Europe and Central Asia) and are responsible for dissemination across multiple countries (such as the Regional Office for East Africa in Nairobi). In countries where there is no UNESCO field office this often means that there is no bulk source of GMR hard copy materials in the country. This places it at a considerable disadvantage when compared to other international reports such as the *World Development Report* or UNICEF's *State of the World's Children* that are able to rely on much larger organisational networks of offices for dissemination (a point also made by the 2009 evaluation).

88. National launches (see next section) provide an opportunity for UNESCO to distribute hard copies of the report to participants and the press, and case study evidence suggests that this is the main way in which copies are obtained by many national level stakeholders.

89. In addition to bulk distribution via field offices, there is a distribution list from which the UK-based contracted distributor sends single or multiple copies of the report (in various languages) and summaries to individuals worldwide.¹⁷ Analysis of this list suggests that approximately 5000 copies of the 2012 full GMR were sent out to individuals and organisations, of which about 60% are located in the global North (over 20% in the United Kingdom alone) (Figure 10). The distribution list is reported to be reviewed at the start of the production year by the GMR Director, Team Manager and production coordinator, and some additions and deletions made based on knowledge of, for example, staff movements. Other additions are made to the list by members of the GMR team when contacts are made at events or one-off requests are received. However, the strategic development of this list by type of target audience or geographical region that might aid a more systematic review has been limited and it does not appear that distribution has been targeted to fill existing geographical gaps in GMR reach.

90. Survey data shows that all groups across all regions are more likely to access and use soft copies of the report than hard copies if they use the report more regularly (see Figure 11). 54% of GMR users had used a hard copy over the last year, compared to 80% who had used a soft copy. Web data shows that each report has considerably higher downloads than the previous report during its launch month and subsequent months; the 2012 Report has been downloaded 65,700 times in 2013 compared to 35,000 downloads of the 2011 report the year after its launch.¹⁸

¹⁷ 'GMR Distribution Orders – 2014', Excel spreadsheet provided by GMR team

¹⁸ July – December 2013 Management Report

Figure 10: Distribution of hard copies of GMR2013/14 (excluding UNESCO offices)*

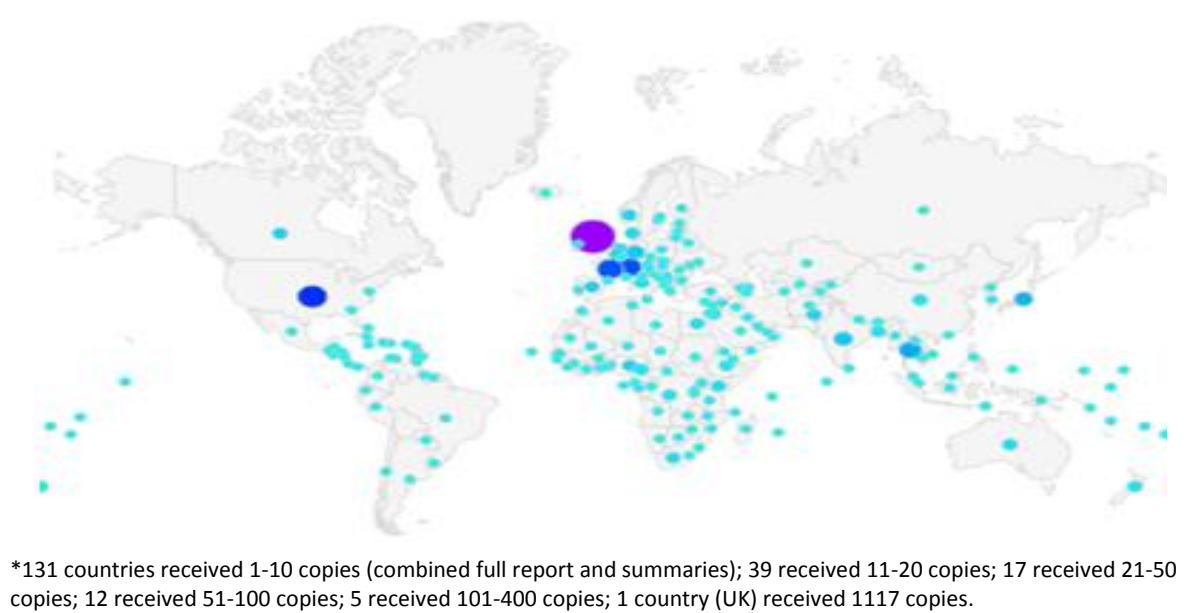
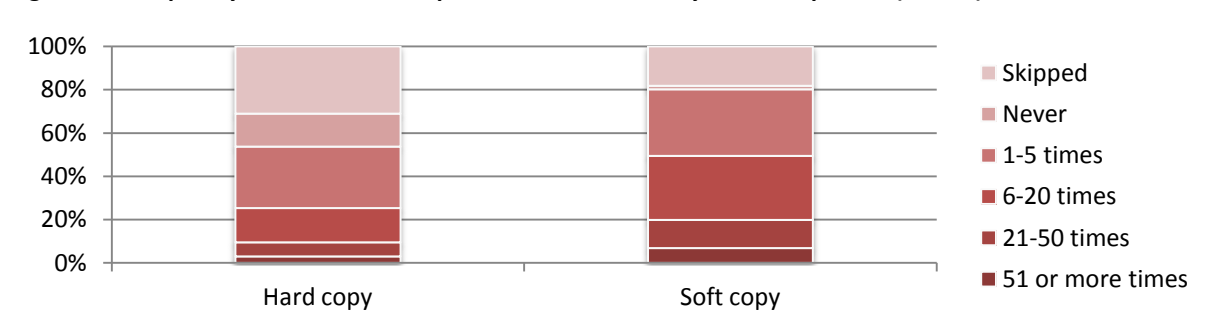


Figure 11: Frequency of hard or soft copies used over the last year, % responses (N=303)



91. However, data on downloads suggests reports are more likely to be accessed in soft copy in higher-income countries. Download data for English language reports in the launch month and following three months for the reports from 2008 to 2012 shows that, of the top ten countries where downloads have taken place the only lower-income country featured is Kenya for the 2009 and 2010 reports (Table 1). There is a strong imbalance, therefore, in both hard and soft copy access towards the global North.

Table 1: Top countries by downloads of full report in English during launch month and next 3 months, for GMRs 2008-2012¹⁹

GMR 2008		GMR 2009		GMR 2010		GMR 2011		GMR 2012	
USA	1113	USA	1684	USA	2815	USA	1814	Unknown	4882
UK	577	UK	789	UK	1564	UK	1310	USA	4170
Germany	388	India	657	India	1151	Unknown	941	UK	1729
India	322	Kenya	475	Germany	711	UNESCO	655	Germany	1024
Canada	253	Germany	435	Canada	676	Japan	403	UNESCO	900
Japan	234	Thailand	373	Kenya	649	Indonesia	400	India	638
Norway	222	France	338	Brazil	568	Germany	377	Japan	620
UNESCO	192	Canada	294	Philippines	539	India	321	Canada	579
Pakistan	169	China	274	France	537	Spain	295	Spain	571
France	168	Australia	237	Mexico	529	China	294	Nigeria	558
Low income		Lower middle income		Upper middle income		High income: OECD		Institution/unknown	

¹⁹ World Bank income classifications 2013

Press and media coverage

92. Press and media releases are carefully orchestrated to coincide with the GMR international launch and other high-level events (e.g. UNGA meeting, World Teachers Day), or tied to the release of a new GMR product (e.g. policy papers). The international launch of the GMR drives a communications embargo on messages about the content of the new GMR before the launch date, in order to maximise the media impact of press releases and GMR messages (although where key opportunities exist some parts of the GMR evidence have been pre-released, such as the 2013 *Education Transforms Lives* booklet in the run up to the UN General Assembly meeting in September 2013). This line of communications activity has been extremely successful in media reach and in improving the visibility of the GMR and key messages at the international level. The GMR team reported in 2013 that “between July and December 2013, over 380 media articles were published every month on average [linked to or referring to the GMR], reaching a total of 78 million readers over the period. This represents a 76% increase over the previous six months. The total number of articles written in 2013 was 3,610, which is 192% more than in 2012. On average, 45 countries’ media covered news about the report each month”.²⁰ In the month after the international launch of the GMR the media coverage for GMR2013/14 was double that for the 2012 GMR and nine times more than the 2011 GMR, with items in all major global news agencies.²¹

93. Both the increased media reach and the monitoring of this reach by the GMR team at an output level has been impressive over the last two years,²² and indicates that this general pathway into policy discourse (through increased possibilities of raising general awareness of the GMR’s messages) has been significantly strengthened.

GMR launches

94. The official international launch of each GMR is the biggest and most labour-intensive event in the GMR’s communications calendar. The GMR has recently done some baseline value-for-money calculations and, taking all GMR launches and events to which it contributes funds (at international and national levels), has calculated that the cost per person per event is high at \$48.²³ The international launch has been used effectively by the GMR team (collaborating with UNESCO Division of Public Information (DPI)) to attract high-level international and national media and press attention (Box 9), and to create an appropriate ‘buzz’ on social media, all of which is noted very positively by the donors, the Advisory Board and other international stakeholders. The move to launch the 2013/14 GMR in Ethiopia rather than as previously in Europe or North America, was noted as an important step by a number of international interviewees to engage more directly with developing country stakeholders. However, the relationship between the high resource inputs (both in time and funding) for the international launch and the actual policy impact is hard to gauge and would require more specific in-depth analysis than this evaluation could undertake, but may be important to establish for justification of costs within limited budgets.

Box 9: UK

The global launch of the 2013/14 GMR was reported in UK mainstream media on 29th January 2014, including on BBC business news, the Guardian Global Development section and the BBC Radio 4 Today programme (early morning news). The global launch was also reported online, for example, on the websites of UK UNESCO NatCom website and the All Party Parliamentary Group on Education for All. The Plan UK Youth Advisory Panel published an online article on the GMR.

²⁰ Management report Jul-Dec 2013 p 6

²¹ Media Coverage Release of the Education for All (EFA) Global Monitoring Report (GMR) 2013/14 January 29 2014

²² <http://www.unesco.org/new/en/education/themes/leading-the-international-agenda/efareport/media-coverage/>

²³ Management Report July-Dec 2013

95. Apart from the official international launch, the GMR team controls and/or collaborates directly on about six or seven other ‘launches’ at regional level and in the global North (Box 10), alongside participation in a number of other related events within strategic organisations or policy-oriented meetings (the GMR Management Report records GMR presentations at 34 events for 2012²⁴). The Director, or a member of GMR staff, normally participates in these events and their support is highly valued, particularly the presentations by GMR staff, who share feedback from the events to inform future reports.

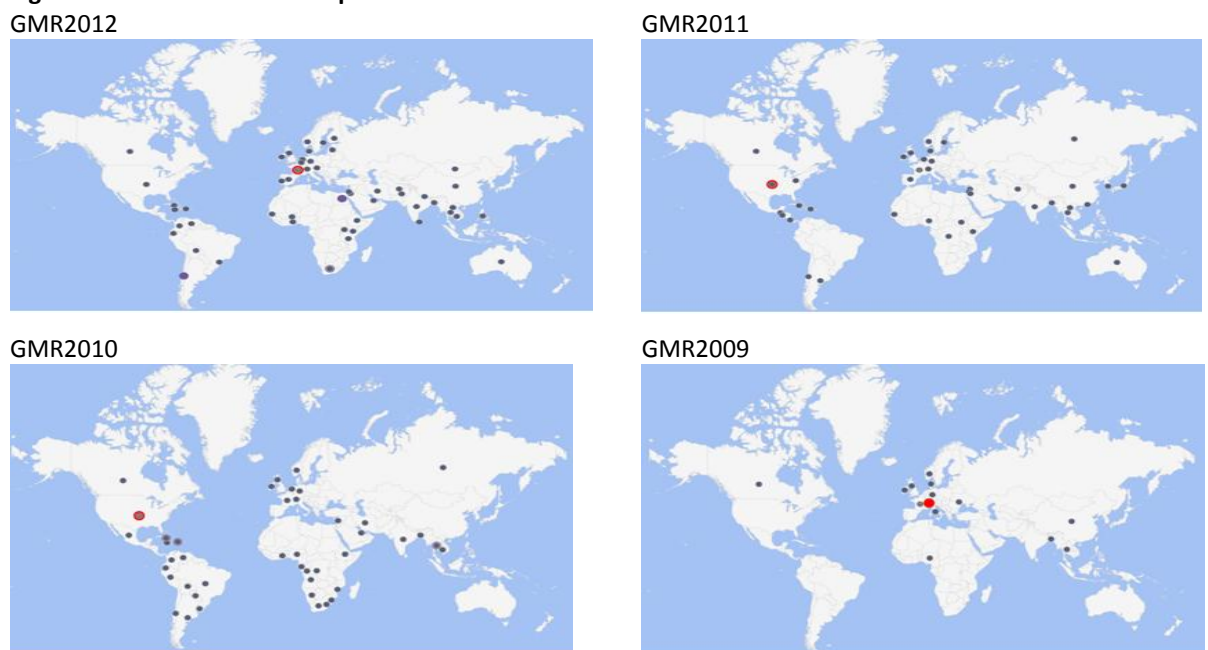
Box 10: UK

In May 2013 the GMR Director made a presentation ‘Education post-2015: equity, measurability and finance’, for the EU Member States and Development Experts Meeting in Brussels, which was reported on the (DFID) HEART website. Within the UK, the GMR Director gave a presentation at the UKFIET Dialogue on Education and Development to 2015 and Beyond (December 2012) on learning lessons for post-2015.

The international education team of Learning and Teaching Scotland (the Scottish government curriculum body) organised a full-day event around the 2010 report on Reaching the Marginalised. This coincided with an OECD report on Scottish education, which raised the issue of the bottom 20% and how to reach them. The conference was held at the Scottish Parliament and opened by the Minister for Schools and Skills. In the morning there were presentations from the GMR team to give the global outlook. The afternoon session had presentations from Scottish educators working with marginalised children. Making the connection between the global outlook and the challenges faced locally was viewed as very effective and influential at policy level. It was a cross-party event, and MPs also participated.

96. Beyond these events, in which the GMR team has a direct influence, there are a number of national launches of the report that occur throughout the year. These have increased since 2009, both in number and coverage with 52 launches for the 2012 GMR (Figure 12). In the global South these events are organised by UNESCO field offices or NatComs and usually have a funding contribution from GMR, but vary widely in quality, focus and types of audience depending on UNESCO or NatCom plans and capacity.

Figure 12: GMR launches and presentations



²⁴ Management report Jul-Dec 2012

97. Evidence on the usefulness of launches and events, in terms of increased take-up and use of the GMR by key stakeholders is mixed. 64% of the 115 survey respondents who had attended at least one launch event said that it did influence them to use the GMR products more in their work. In the field offices survey, of the 16 respondents that said they had been involved in a launch, 12 thought it was an effective means to promote the GMR and its messages, with respondents citing the opportunity they provide to bring together a good mix of stakeholders, generate press coverage and sensitise stakeholders to the key issues or the theme. In Brazil, Senegal and India, case study research found that launches generated a high level of media interest and were thought to raise awareness, whilst the most recent Kenyan launch demonstrated the potential to directly engage key national policy decision-makers (Box 11). However, in these countries as well as Lebanon, interviewees reported that the range of participants at events were not necessarily the most strategic stakeholders, therefore limiting the quality of the discussion and the impact on policy influencers (Box 11). In federal countries such as India and Brazil, there is little access to national events for state level policy actors, and no outreach or sub-national events have been conducted.

Box 11:

Kenya

The UNESCO country office and the Kenya NatCom for UNESCO office organise a national launch after the global launch has taken place. Discussions with respondents indicate that the launch is a relatively restricted event due to budget constraints. However, in the most recent launch (May 2014) the Cabinet Secretary (Minister) of Education opened the event, and also stayed to listen to a panel discussion amongst teacher unions, the Teacher Service Commission, assessment specialists and students.

India

The launch for the 2013/14 report was on 29th January, to coincide with the international launch. It transpired that there was also a major UNICEF event on the same day, so attendees were not of the number and quality they might have hoped. However, speakers and audience members included the state minister for Delhi, representatives from the national government, schools, students, NGOs, INGOs, civil society education coalitions and the UN. Civil society groups were positive about launches and the range of people involved, as was the Ministry for Human Resource Development. Researchers, on the whole, were a lot more sceptical about the value of the events; the type of people in attendance (largely students) did not enable a constructive, serious and useful discussion. Researchers felt that the launch should be an opportunity to bring together academics, government and civil society and have a serious debate, using the report as a starting point, rather than just an opportunity for the government to promote their side of the story.

98. Whilst the GMR team has made efforts to encourage UNESCO field offices to hold launches, including making contributions to funding, the GMR team has little influence and it is up to the field offices themselves to decide to hold a launch, leading to varying coverage year-on-year. Following the 2009 evaluation, the GMR team has taken steps to bring more consistency and accountability to the national launches, producing guidelines for field offices and requesting more detailed information on the type of event, a report on the event and planned follow-up. This has certainly been appreciated by those field offices engaged with GMR launches (Box 12). However, without leverage from the GMR to enforce follow up activities, the response of the field offices has been limited with few reports and little evidence on which to assess the effectiveness of the events.

99. None of the case study countries reported conducting follow-up activities or systematically monitoring how the GMR is promoted or used by other organisations after the launch, citing funding and time constraints. Nine respondents in the field office survey reported carrying out some kind of follow-up, though examples were primarily about other types of activities to promote or distribute the GMR, rather than tracking use or reach.

Box 12: India

UNESCO staff were, in general, very positive about the support they received from the GMR team around the launch date of the new report on planning, budgeting, agendas for launches, distribution and invitation lists, providing press release templates and presentations for the launches, webpages and embargoed links to send to journalists. In addition to these materials, the UNESCO office produce a summary in which they pull out the Indian references into a word document and send that to the journalists along with the press release. There is high coverage in national papers around the GMR launch. In 2014, on the day of the launch and the five days following, the UNESCO office collected 30 stories from 25 newspapers which featured or referenced the GMR, with headlines focussed on report extracts about India.

100. The particular relationship between the GMR and UNESCO, and the UNESCO branding of the report, constrains the GMR from inviting other national level organisations (e.g. development partners or NGOs) to organise GMR launch events themselves. Typically, in the global North countries where there is no UNESCO office, launch events may be organised by a variety of different partners and interested organisations. In the UK, for example, the DFID grant for the UNESCO NatCom launches has recently been discontinued, leading to events in 2012 and 2013/14 hosted by academic partners working in education and development, whilst in the Netherlands the national launch is organised by the Global Campaign for Education (GCE) Netherlands. In general, such launches tend to focus on developing countries rather than national interests, though there are some exceptions to this where the issue is particularly relevant (Box 10).

101. The timing of the national launches can also be variable – in some cases the scheduling by UNESCO offices has been well aligned to coincide with relevant national events or opportunities, but in others it has been constrained by the field office’s capacity and commitments, resulting in launches disconnected from national strategic opportunities and held several months after the actual publication of the GMR, leading to some frustration among national interviewees who are aware of the GMR international launch.

Social media

102. Since 2011 the GMR team has developed an annual social media strategy, led by the Social Media Specialist, and social media channels are monitored on a monthly basis to inform future priorities for the communications team. The communications team have made impressive progress in developing a presence for the GMR on social media, with, for example, the number of Twitter followers growing from 79 in March 2010 to over 11,600 by May 2014. Social media has been used to direct key messages from the report and news of GMR outputs to both the general public (including youth and teacher audiences) and, more specifically, to the mainstream journalist community, which increasingly uses Twitter as a news alerting service. Guidelines have been produced for using Twitter and for using social media in regional launches. Social media tools such as ‘tweetchats’ have also been used to engage international development and education agencies and their followers in discussion and debate around specific topics. Analysis of social media followers has provided the GMR team with some evidence of the effectiveness of this channel; an increasing number of ‘influencers’²⁵ in education and development, including campaign organisations and INGOs, are following, mentioning and retweeting GMR content ensuring the messages receive a higher hit rate. In addition, the GMR also provides social media packs to partner organisations around any event or product launch. Whilst the impact of this is hard to trace (as partners may then be using GMR statistics without reference to the GMR) it is likely that actual reach is higher than these figures suggest.

103. A benchmarking exercise conducted by the GMR team in 2011 found that the GMR had fewer

²⁵ ‘Influencers’ refer to Twitter users with high levels of followers and interactions

followers and published less content than other actors, and an analysis of what the team could do differently was carried out. A similar benchmarking exercise by the evaluation team revealed that, by April 2014, the GMR was publishing more content than many other education and development organisations, and matching them in terms of the number of followers and interactions, suggesting that findings of the 2011 exercise were acted upon effectively (Table 2). The GMR does have less reach than some organisations, particularly campaigning organisations such as GCE and the Girl Effect, and has lower numbers of Facebook ‘likes’ compared to a number of other organisations, but this must be put into the context of the nature of the GMR (not a campaigning entity) and the relatively short time over which its social media work has been developed. Between March 2013 and April 2014, the GMR has posted an average of 7.98 tweets day, more than most similar organisations, and has a high level of retweets (including by those with greater reach than itself), suggesting content is relevant and engages users. Twitter followers are from all over the world, although with a strong concentration in Europe and North America.²⁶

Table 2: Number of Twitter and Facebook followers compared to other education and development organisations

Twitter followers		Facebook likes	
The Girl Effect	86,000	Because I am a girl	536,915
OECD education	36,800	The Girl Effect	327,041
Global Partnership for Education	29,500	GPE	49,140
Global Campaign for Education	25,700	UNGEI	29,384
Because I am a girl	14,900	UNESCO Asia-Pacific Regional Bureau for Education	13,170
UNICEF Education	13,800	Education International	9,079
GMR	11,500	Global Campaign for Education	8,948
UNGEI	8,346	GMR	6,938
UNESCO Asia-Pacific Regional Bureau for Education	3,240	UNESCO Institute for Lifelong Learning	317
Education International	3,122		
Oxfam Education	1,481		

104. The World Education Blog is also a new channel introduced to engage a wider audience in issues raised by the GMR, with over 75 posts in 2013 primarily written by GMR team members but with some guest bloggers (in particular on shaping the post-2015 agenda). Responses in interviews for this evaluation suggest that the blog is read regularly by a small percentage of technical specialists in international development organisations (including UN agencies) and NGOs, and by some academics specialising in education development. Posts on the blog are also picked up and reused by other education and / or development websites.²⁷ Engagement with the blog has been steadily increasing, reaching 1,124 followers in November 2013 and views up from 2,285 views per month in 2010 to 10,302 in 2013. Of the survey respondents, 31% sometimes or often use the World Education Blog, and 23% said they were aware of but had never used it. Donor and development agencies and national NGOs most commonly reported that they sometimes or often use the blog (47% and 39% respectively).

105. Nonetheless, of all GMR products, the survey found people least likely to access the GMR through social media or to find out about the GMR through social media channels, and only 23% said that they sometimes or often used GMR’s social media outputs. In all the case studies, with the exception of the UK, the majority of respondents did not use social media. International

²⁶ A map generated by Followerwonk <https://followerwonk.com/>, demonstrates wide global spread, with high concentrations in Europe and North America (roughly 650 in each), followed by South (204) and South East Asia (134) Southern (100), Eastern (115) and West Africa (146) and the Middle East (105). Followerwonk uses the location field in Twitter accounts and tries to approximate the geographic location of up to 5,000 users and map them; this is an inexact procedure by gives an impression of the spread of followers.

²⁷ For example the ODI’s www.post2015.org and NORRAG news

interviewees generally were aware of the GMR’s social media work and felt that it is a necessary good but did not themselves engage with it.

106. While the expansion of GMR’s social media presence has been impressive over the last few years, reflected in the output level indicators of reach reported in the GMR Management Reports (Table 3), it is not so clear what specific audiences engage with the GMR on social media, or whether social media outputs are reaching key influencers in policy discourse.

Table 3: Key performance indicators from Management report Jul-Dec 2013²⁸

Key performance indicator	Total 2012	Total 2013	% Change compared to 2012
Media articles	1,191	3,610	+ 192%
Launches	68	19	- 72%
Website visitors	557,579	172,386	- 69%
World Education Blog unique views	86,505	125,599	+ 45%
Facebook average weekly reach	5,171 (average weekly for the year)	13,713 (average weekly for the year)	+165%
Facebook page likes	3,435	6,345	+ 84%
Twitter new followers	2,658	6,807	+ 157%
LinkedIn	576	1,443	+ 179%
Email news alert subscribers	5,550	6,487	+ 17%

Partnerships with other international and national stakeholders

107. In 2010 the Advisory Board discussed the “need to use the members of the Advisory Board more strategically to reach country-level stakeholders”²⁹ and the GMR Director agreed that the GMR team would put together a strategy for working more closely with the Advisory Board members to enhance dissemination and outreach in least developed countries. This strategy was not apparently developed formally, although both annual communications and outreach strategies have a specific objective to involve members of the Advisory Board and other partner organisations in the process of sharing information and disseminating GMR messages each year. The communications and outreach strategy for the 2013/14 report also has as one of its objectives “Build alliances and share information with partners working on learning”, specifically relating to the ‘Teach and Learn’ messages, and the collaboration with Education International to develop a teachers’ GMR summary and toolkit (ongoing) is a successful example of partnership.

108. Other examples include the development of a “Youth Blog (with 62,000 followers), a youth campaign to send the Report’s messages on skills to governments, an art competition, and the first ever youth version of the 2012 Report, in collaboration with Peace Child International” for the 2012 Youth and Skills report.³⁰ Within the limited GMR budget the justification for the costs involved in some of these additional activities (particularly the art competition and youth version of the report) may be questioned but the partnerships with external expertise to reach specific audiences has been valuable. Pieces of work related to specific reports, with partners such as ActionAid and Save the Children, have reportedly been successful and helpful in strengthening those organisations’ evidence-based advocacy work on specific issues, such as education financing. These types of partnerships appear to have potential for expansion into a more systematic and strategic approach by the GMR in its mandate to promote awareness and be a useful advocacy tool for others around EFA goals as well as annual themes. To date, annual timeframes have restricted GMR’s capacity to develop a broader collaboration strategy and programme, which spans more than a specific report/theme and relates to ongoing goal monitoring and advocacy.

²⁸ It should be noted that the figures in this table compare a period in 2012 that included a launch, with 2013 where no GMR launch took place. The GMR team have subsequently provided revised figures on some of these indicators – however this table is what was officially presented to the Advisory Board.

²⁹ Advisory Board meeting minutes 2010

³⁰ *ibid*

Languages

109. The full GMR is currently published in five languages (English, French, Spanish, and Arabic and Chinese with co-publishers). In 2012 the Russian language edition was dropped as an emergency cost-saving measure and has not been resumed, following a cost analysis per translated report based mainly on number of downloads of the pdf version in each language. Attempts were made by the GMR team to gather feedback from stakeholders in Central Asia on this issue but very limited responses were received.

110. The summary report 2013/14 is published in all six of these languages plus Hindi, Portuguese, Korean and Nepalese. Funds are available from GMR to contribute to the translation of both full report and summaries by third parties, and there are a number of examples of field offices translating reports into local or national languages. According to download data for 2012-2013, English remains the most popular language with 55% of total downloads, followed by Spanish (28%), French (9%), Chinese (4%) and Arabic (3%). The wider survey found 90% of respondents reading the report in English, 10% in French and 7% in Spanish (many respondents selected more than one language).

111. The languages in which the GMR products are available was raised as an issue in three of the case study countries (with some comments on language also arising in two other case studies), as it can restrict access by many interested stakeholders, particularly national and state policy-makers. For example, in Brazil, only the summary is produced in Portuguese, and in general in Viet Nam products are only available in English (Box 13). In federal countries such as India where the states use different languages, the problem is compounded. Suggestions were made in several case study countries for summaries to be translated into more languages, for local language regional summaries or translated sections relevant to specific countries. Such suggestions have obvious cost and time implications and the GMR has constraints in the range of translations it can support, although it tries as far as possible to respond to requests from UNESCO field offices.

Box 13:

Brazil

The GMR in Brazil is available in two formats, the complete GMR report, in English, and the executive summary in Portuguese. The majority of those working at Federal level do not have the capacity to read in English, let alone those at state or municipal level, so therefore can only access summary versions. This has a significant impact on how well the report is known and used. All respondents were keen that the report was available in Portuguese, or at least made available to them in Spanish, which would be easier to understand.

Viet Nam

Along with the lack of launch events, language is seen a major reason for lack of awareness about the report. Very few national officials can read proficiently in English, and this becomes more of a challenge at local levels. The 2005 report was translated locally into Vietnamese but no reports have been since. One provincial education office director considered the 2005 report on quality as a guide for renovating the education system in his province – if the report hadn't been available in Vietnamese this would not have been possible.

Citations in scholarly and other publications

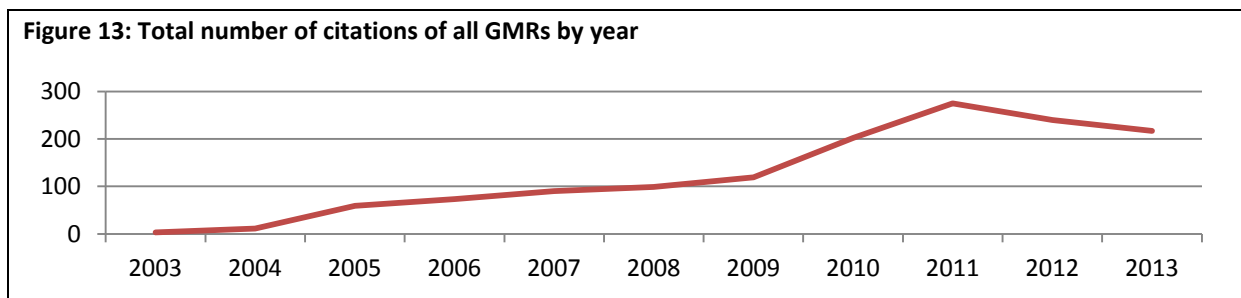
112. The GMR has a strong presence in scholarly journals with each of the GMRs from 2002-2010 receiving over 100 citations (Table 4 – note that the two to three year publishing lag for scholarly articles means the citations for 2011 and 2012 reports are lower). The 2005 and 2010 reports have been the most cited with 278 and 223 citations respectively, with the 2010 report receiving very high numbers of citations immediately and the 2005 report maintaining a high level of citations year on year.

Table 4: Number of citations of each GMR by year

	2002 Report	2003/4 Report	2005 Report	2006 Report	2007 Report	2008 Report	2009 Report	2010 Report	2011 Report	2012 Report
2002	0	0	0	0	0	0	0	0	0	0
2003	3	0	0	0	0	0	0	0	0	0
2004	7	4	0	0	0	0	0	0	0	0
2005	21	23	15	0	0	0	0	0	0	0
2006	17	22	28	4	2	0	0	0	0	0
2007	14	13	39	17	7	0	0	0	0	0
2008	8	19	23	24	15	10	0	0	0	0
2009	5	10	29	21	18	24	12	0	0	0
2010	6	16	31	27	27	37	28	27	3	0
2011	8	18	35	32	24	29	42	73	14	0
2012	9	11	41	13	15	25	30	68	28	0
2013	6	7	32	14	11	18	32	47	43	7
2014	2	3	5	2	5	6	2	8	9	7
TOTAL	106	146	278	154	124	149	146	223	97	14

113. It is clear from the total number of citations of any GMR by year that there has been an increase in citations since 2009, indicating that there has been a boost in the reach of the GMR into academia since the last GMR evaluation (Figure 13). Citations have mainly come from authors affiliated to UK or North American institutions, but there is also a reasonably wide global spread of authors’ geographical locations, with India, South Africa and Australia providing consistent centres, and some authors also regularly coming from Ghana, Nigeria and Eastern Africa. However there is a conspicuous lack of authors from South East Asia, Central Asia or Latin America.³¹

Figure 13: Total number of citations of all GMRs by year



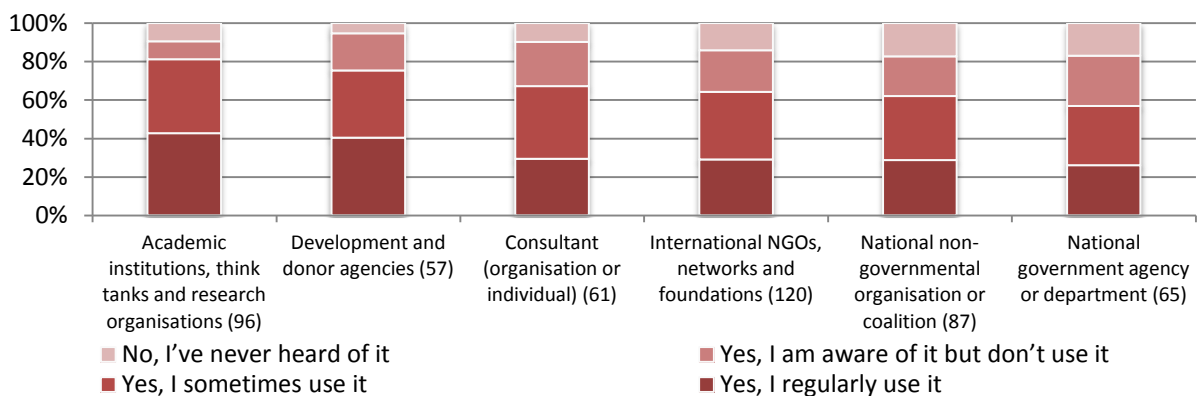
114. Background papers are cited at low levels with few papers receiving more than one or two citations. Again, the background papers prepared for the 2005 GMR recorded the highest level with 109 citations across the 52 papers.

Awareness of the full range of GMR products

115. The wider survey results reveal that awareness and use of the GMR within the surveyed population was generally high but with national governmental and non-governmental actors the least likely to know about or use GMR products (Figure 14). 17% of national government respondents stated that they had never heard of the GMR and 26% that they were aware of it but had never used it (these are relatively high levels given that 58% of those individually invited to participate in the survey are on the GMR’s distribution and communications lists), compared to 5% and 19% respectively of development and donor agencies. Within the country case studies the lack of awareness was more significant with a widespread lack of knowledge or access to the GMR amongst government stakeholders.

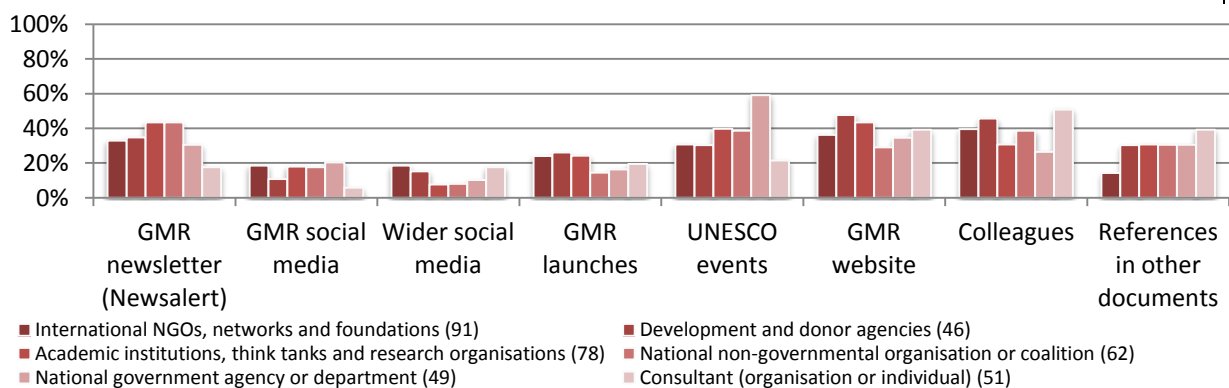
³¹ Analysis was conducted across all items in Scopus, regardless of language. Scopus, as with all such international journal databases, requires some basic journal information to be available in English so will not capture all journals across the world, but does include leading journals in all these regions. The absence of citations of the GMR either within the journals from these regions or from authors from these regions contributing to other journals is thus still notable.

Figure 14: Awareness and use of the GMR and related products, as % of organisation type [N=486]



116. Amongst the survey respondents who are aware of the GMR, the means by which they learn about the GMR varies amongst the types of stakeholders (Figure 15). Social media has the lowest levels of response across all types of respondents. For international actors (INGOs, networks and foundations, development and donor agencies and consultants) the GMR website and colleagues are the primary sources of information on the GMR (international interviewees also mentioned the GMR email Newsletter). For national level respondents UNESCO events (in which national respondents are likely to have included GMR national launches given the close association of the GMR and UNESCO at this level) and the GMR Newsletter are the main sources of information.

Figure 15: How stakeholders become aware of GMR materials and resources, by organisation type [N=377]



117. In terms of the GMR products other than the report itself, the survey indicates a relatively wide awareness of and use of the various materials, most frequently the statistics and online databank of the GMR and least often the WIDE database and infographics (Figure 16). In terms of different stakeholder types (Figure 17), policy papers are most likely to be sometimes or often used by development and donor agencies (86%) and academics (76%), and statistics by national governments (86%). Background papers are most likely to be used by consultants (74%) and academic institutions (69%). Encouragingly, 66% of national government respondents stated that they sometimes or often use policy papers. However, the majority of national interviewees in the case studies did not know of products beyond the annual report itself (and many did not know of the GMR at all), except in the UK. Surprisingly, international NGOs, networks and foundations had the lowest knowledge across all additional GMR products, with knowledge of the WIDE database particularly low: 17% stated they sometimes or often use it, and 26% that they had never heard of it. INGO interviewees commonly expressed the value that the WIDE database brought to the sector, suggesting the low level of use amongst survey respondents is an issue of awareness and reach rather than content.

Figure 16: Awareness of GMR materials, % of total responses [N=300]

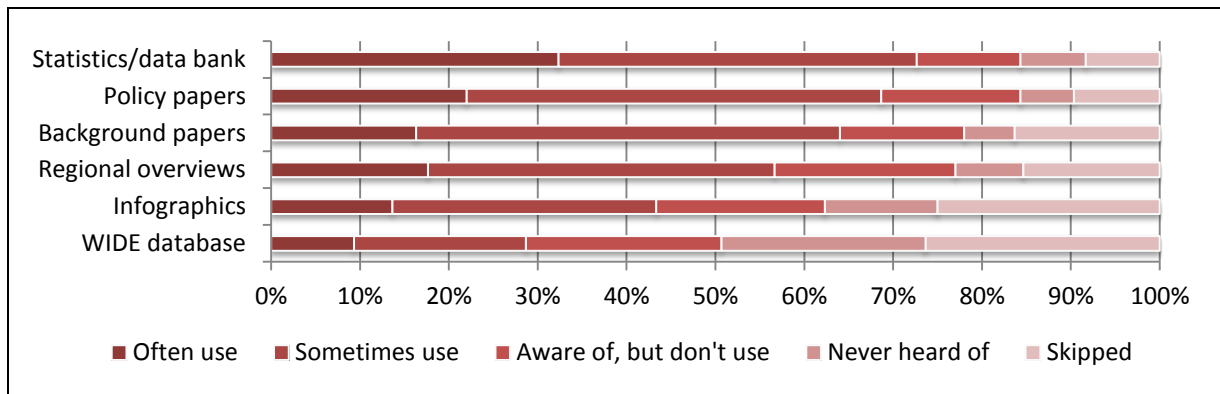
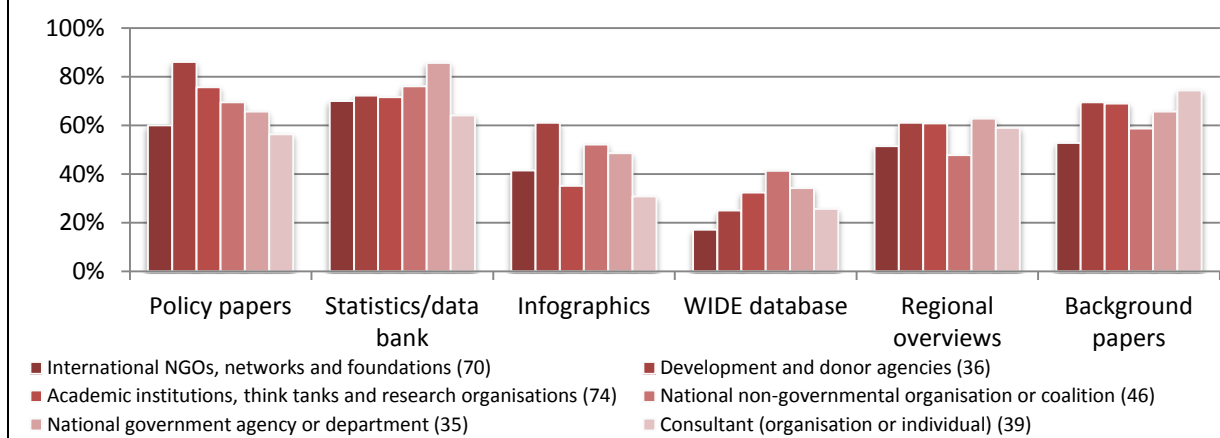
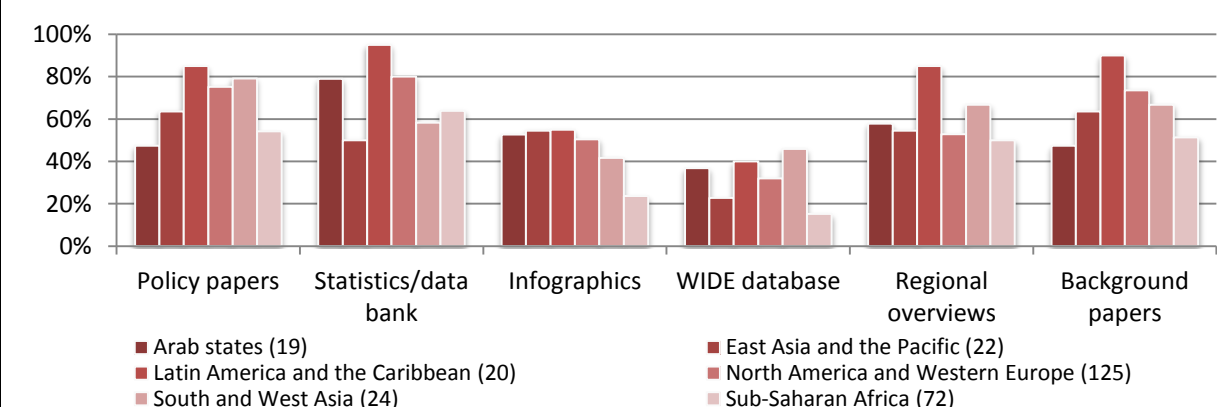


Figure 17: Percentage of survey respondents who stated they often or sometimes use other GMR products, by organisation type [N=300]



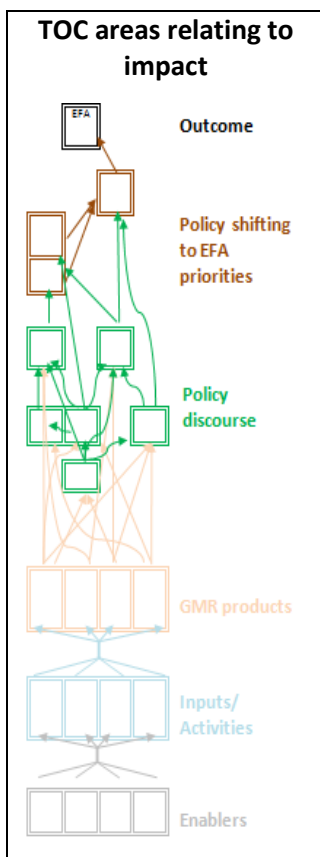
118. There also appears to be some regional discrepancy in use of the GMR products. Respondents from Latin America were most likely to sometimes or often use all products with the exception of infographics and the WIDE database (Figure 18 – although category sizes mean that these results should be treated with caution). In sub-Saharan Africa, there is relatively low use across all products, with these respondents least likely to be aware of or have used the WIDE database (32%) and infographics (41%).

Figure 18: Percentage of survey respondents who stated they often or sometimes use other GMR products, by region [N=282]³²



³² Note that Central and Eastern Europe and Central Asia were omitted from analysis of this question due to low response rates (less than 10)

4.1.3 Impact



119. Impact addresses the top levels of the TOC: how the GMR influences, informs and is used by different actors within policy discourse and how that feeds into policy decisions to push forward EFA agendas. It is therefore predicated on the effectiveness of the previous levels and linkages of the TOC and extends them upwards via direct use of the GMR in policy development, use of GMR evidence and messages by stakeholders to advocate and inform other stakeholders within the policy discourse arena (indirect reach), and more intangible informing of stakeholders’ perspectives, approaches and understanding through their engagement with GMR products.

120. The influences and links are particularly difficult to attribute and assess at this level because they take place beyond the direct control and influence of the GMR and in the complex context of multiple and shifting actors, relationships, agendas, priorities and events that feed into policy.

121. The evaluation considered the impact of the GMR from three perspectives:

- Whether the GMR informs and animates discussion within stakeholder organisations around key themes and topics;
- How the GMR has been used in advocacy, and by whom; and
- How the GMR has been used in high level policy discourse and policy-making, and by whom.

Key findings for impact

Overall, where stakeholders are aware of the GMR and have access to it, it is playing an important and influential direct and indirect role in policy discourse and policy-making. This is particularly the case at international levels. However, the reach and awareness is too low at national levels to provide regular or consistent influence on policy dialogue in many countries.

Stakeholders at both national and international levels use the GMR as a reliable and authoritative source of reference to inform and strengthen their work, particularly in research reports and presentations. Within academia it is commonly used to frame and contextualise research questions and is increasing in visibility.

Stakeholders most often draw on statistics from the GMR, but thematic and EFA progress analysis are also commonly used, and to a lesser extent the work on education financing (where the GMR analysis is very strongly cited amongst those most concerned with this issue).

At international and national levels, the GMR provides advocacy stakeholders with valuable and credible evidence to feed into their materials and activities. The annual publication of the GMR provides a vital regular window of opportunity for advocacy organisations as increased attention is drawn to education by the new report. The GMR is also used within international organisations to strengthen internal advocacy for education programming and resourcing. In some cases, however, controversial data, perceived lack of relevance and the tone of GMR messages has undermined the usefulness of the GMR to some advocacy organisations.

At the international level the GMR is actively used within policy discourse and policy decision-making and its response to emerging issues and trends (such as through the development of the WIDE database) has kept it central to evolving post-2015 discussions.

At national level, there is some evidence of the GMR directly informing policy through four main routes: use for regional/global benchmarking; contributing to momentum and policy action around a specific issue; providing tools and examples from which policy-makers can draw; and provoking public reactions from policy-makers. However this influence is constrained by the limited circulation of the GMR messages and products at national levels. Interviewees noted a need for more targeted and disaggregated products that reach the hands of policy-makers not only in the education sector but in other sectors that contribute to education policy (finance, human resources, health etc).

Use of the GMR to inform and animate discussion around key themes

122. As mentioned in paragraphs 58-59, evidence from international interviews indicates that the GMR is not only well aligned with current thinking in the education sector but that, in some cases, it has been a leading influence in bringing specific themes and perspectives onto the agenda. The GMR appears to be particularly successful in this when it has been able to break down silos either within the education sector (such as with ECCE in 2007 or skills in 2012) or cross-sectorally (e.g. bringing a conflict perspective to education in 2011), with education specialists and non-specialists alike noting that the GMR has at times bought new concepts or frameworks to their analysis on education.

123. Evidence from the case studies indicates that, at national level, the GMR can be important in contributing and adding weight, or a new impetus, to discussions when it coincides with existing or emerging national areas of education debate and priority (Box 14). The extent to which the GMR initiates discussion on a topic or adds to an existing debate is extremely difficult to assess, but where stakeholders are aware of the report it appears to be a contributor to the general educational dialogue that informs actors within the policy arena. However, it is important to place this in the context of the reach of the GMR as discussed in the previous section: awareness of the GMR at national levels is limited, so whilst it can inform debate, its impact at this level is restricted by its relatively low circulation.

Box 14:

Brazil
Some topics treated in GMRs have been used in political and technical discussions, when the topic is relevant for Brazilian situation. However, many aspects of the report are not relevant to the Brazilian context: education coverage or gender equity are not perceived as problems for Brazil, for example. Current concerns about the quality of educational provision make the recent report on teaching and learning very relevant, and it has been considered very helpful in stimulating discussion around the current challenges of Brazilian education.

Kenya
The Youth and Skills report raised some excitement among academics and in the private sector, who would both like to see a paradigm shift to address the gap between academic achievement and job skills. Previous reports have also supported the elevation of issues onto the policy agenda, including literacy, nomadic education, gender and ECCE.

India
The themes and topics of the report align well to national priorities; the last two reports, in particular, have been very timely. A consultation for the review of the TVET policy in India is just starting, and UNESCO is involved, so the 2012 report is very relevant. India claims to be close to universal access, and the levels of learning and quality overall are now a focus – looking at teachers is therefore very useful. There is a current focus in the government on the creation of quality indicators. The increasing references to India and Indian organisations in the report (in particular Pratham, ASER and Young Lives in the 2013/14 report) help to increase the relevance. Stakeholders said that though the GMR themes are relevant and the reports interesting, however, they do not inform the direction of their internal or external organisational focus. The reports are useful to support work already being done, reinforce and add weight to messages, but not to shape that work or decide what the messages should be.

Lebanon

Most organisations did not think the GMR informed their agenda on education. It is aligned with their priorities, but is mostly used as a reference rather than a stimulus. There were some exceptions to this, for example in a research centre where it has influenced their research strategy and focus.

124. International and national interviews and survey evidence indicate that when the GMR is used, it is largely for adding to existing debates. International interviewees from across different types of organisations indicated the importance of the GMR as a reference document – an authoritative source that they turn to for credible statistics and analysis to support and strengthen their existing work or inform them on a particular topic. One INGO, for example, stated that they had recently developed a new partnership on skills development and had turned to the GMR 2012 report on youth and skills for information, resulting in them taking the report’s skills framework as the basis for this new strand of their work. 92% of those survey respondents who use the GMR are using it as a reference (Figure 19): data tables are the most commonly used part, followed by the EFA progress section and then the thematic section (Figure 20). How these respondents use this information and analysis varies with the type of stakeholder, but overall the most common use is in writing research reports and papers or in presentations (Figure 21).

Figure 19: Uses of the GMR as % of respondents’ organisation type [N=292]

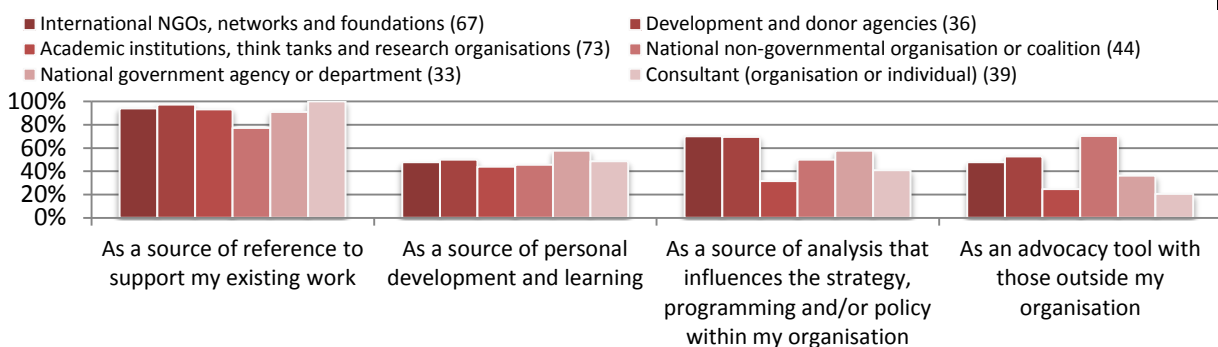


Figure 20: Survey respondents' use of the different aspects of the GMR [N=300]

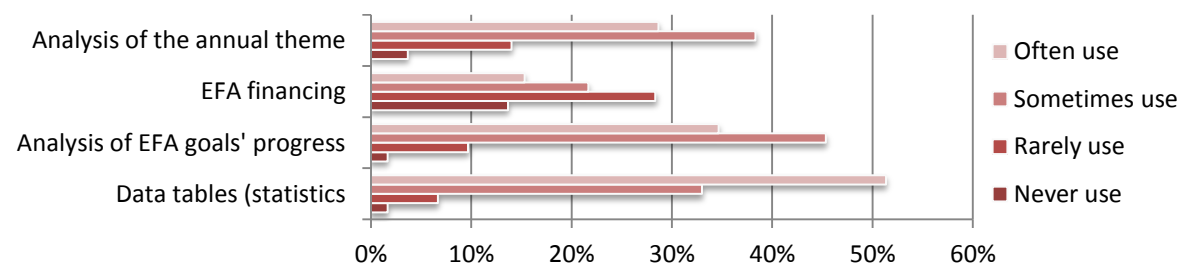
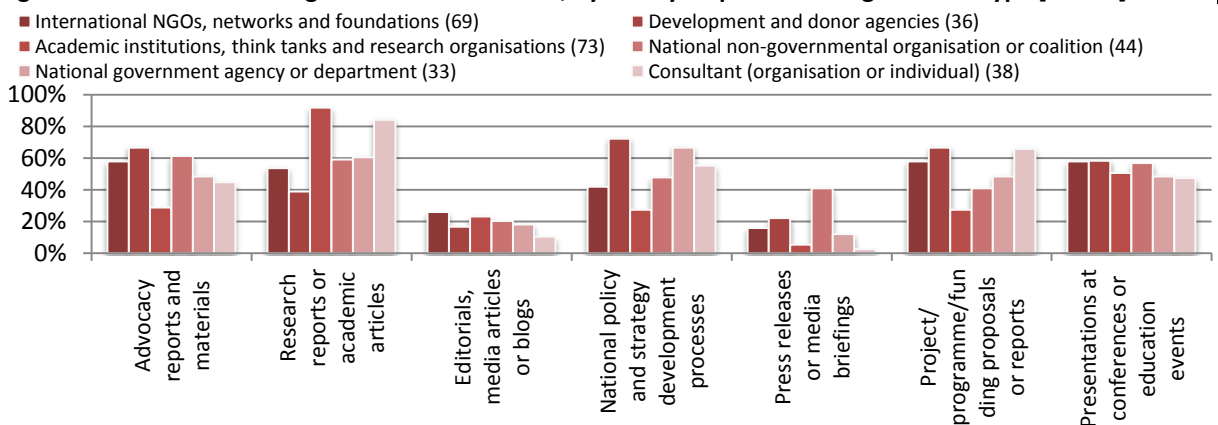


Figure 21: Use or referencing of the GMR materials, by survey respondents’ organisation type [N=293]

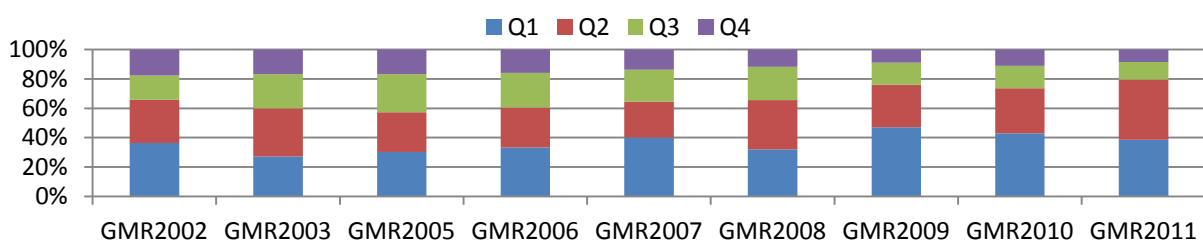


125. These findings are reinforced by analysis of reports, strategies and policy and discussion papers from a sample of INGOs and donors over the last four years. The GMR is regularly cited in these documents, most commonly as a source of statistics to provide a global or regional context of the education situation, but also by reference to thematic issues raised in the GMR. One area in which the GMR appears particularly strongly is education financing. Whilst documents focussed on this issue are not very numerous, the GMR (and supporting background papers) featured prominently as a major source of evidence and analysis. This is supported by evidence from the international interviews in which the education financing section (and particularly the issue of domestic financing for education raised in the latest GMR) was noted by many interviewees as a key contribution to the sector. Similarly in an analysis of a random 10% of the citing academic articles of the 2010 GMR, wherever education financing was a focus, GMR citations were particularly prominent.

126. Analysis of this sample of the academic citations of the GMR also highlights that the GMR is mainly cited within the introduction of an article rather than the main body, and as a source of statistics and/or thematic content in order to frame or add weight to the relevance of the article’s topic, indicating that the GMR is an important contextualising document for academic research agendas. Two of the articles used questions arising from the GMR as the basis of their article’s theme, and several of the articles referred to definitions and frameworks presented by the GMR (e.g. marginalisation) as a starting point for their arguments. Word-frequency analysis of the titles and abstracts of all citing articles of the GMR also indicate that articles most frequently relate to the theme of the GMR, with relevant thematic words appearing prominently (i.e. for those citing the 2011 GMR ‘conflict’ appears prominently in the article titles and abstracts, ‘quality’ for those citing the 2005 GMR, ‘literacy’ for those citing the 2006 GMR etc.), whilst ‘policy’ and ‘impact’ feature commonly across all the articles’ abstracts.

127. Looking at the impact of academic citing articles, there has been a gradual increase in the visibility and prestige of the journals in which citing articles of each GMR have appeared, with a growing number of those journals ranking in the top two quartiles of their specific disciplinary fields (largely education (48% of the articles), social science (8%), development (7%) or economics and econometrics journals (3%)), reaching 80% of those journals with citing articles of the 2011 GMR (Figure 22).^{33,34}

Figure 22: Impact rating of journals which contain citing articles of the GMR, ranked by quartile position within the journal field



128. Whilst there are challenges around the use of journal ranking metrics, this evidence indicates that the GMR has a growing (and larger than reported in the 2009 evaluation and GMR management reports) visibility within academia and is being picked up by the top education journals.

³³ This is based on the SClmago Journal Rank indicator from the Scopus database (<http://www.scimagojr.com/>) which shows the visibility and prestige of each journal according to their coverage, output, levels of citations and which other journals are citing them, and ranks them within their own disciplinary fields to account for variations in citing trends.

³⁴ It is interesting to note that four journals take up 23% of all GMR citing articles – *International Journal of Educational Development* has 9.1% of all citing articles and has been in the top quartile of education and development journals for the last 4 years; *Compare* has 6.1% of all citing articles and has been in the second quartile of education journals since 2008 and in the top quartile since 2012; *International Review of Education* has 4.1% of the citing articles and is in the third quartile of education journals; and *Prospects* has 4% of the citing articles and has been ranked in the third or fourth quartile of education journals.

Use of the GMR in advocacy

129. An important part of the GMR’s vision is to be an advocacy tool for those involved in the promotion of EFA, and from the international interviews (particularly amongst those INGOs with wide country office networks and civil society networks) there was a strong emphasis on the importance of the annual publication of the GMR as creating a regular opportunity and opening to provide new impetus to their advocacy work whilst attention is turned to the GMR and educational progress. Several INGO and international network interviewees therefore stated that the annual GMR was critical for their organisation’s advocacy programmes internationally and at national levels. There have been a number of very useful partnerships noted among the interviewees where the GMR has collaborated with INGOs on specific topics to strengthen these organisations’ advocacy reports and materials, such as with Action Aid around literacy and education financing, or Save the Children on education and conflict.

130. In a number of the case studies the importance of the GMR for advocacy was also noted amongst the national NGOs and civil society organisations that were aware of and accessed the GMR (again this needs to be placed in the context of low awareness of the GMR amongst stakeholders in the case studies, and also the report’s perceived limited relevance to national contexts by some stakeholders noted in section 4.1.1). For them the report provides inspiration for their advocacy and awareness activities, and is an important, authoritative source that adds credibility and weight to their (existing) arguments. This includes not only the use of supporting statistics and data in materials but also analysis on a range of different themes and topics to support their work (Box 15).

Box 15: Senegal

NGOs – including civil society, journalists, teacher unions and researchers – reported gathering inspiration from the GMR in their work pressuring the government on EFA matters, in training workshops, public events, white papers and other publications. For example, a cultural and scientific institute in Dakar which measures levels of learning in Senegal and seeks to raise awareness on the issues of quality, downloads all reports published by the GMR, prints them and distributes them to all their researchers. They use GMR analyses on topics such as educational quality policies, teacher training, the financing of education, gender issues, girls school achievement, to position themselves at the international level. Another example comes from the Journalists’ Network for Education, Training and Research which uses the GMR as a reference text in its training workshops for its members to strengthen their ability to produce articles in favour of EFA.

UK

The University of Ulster Institute for Research in Social Sciences finds the recent development of infographics, policy briefs and presentations useful for advocacy purposes. The Institute draws on these (through their own Communications Officer) to retweet within Northern Ireland those emerging issues which are relevant there.

Viet Nam

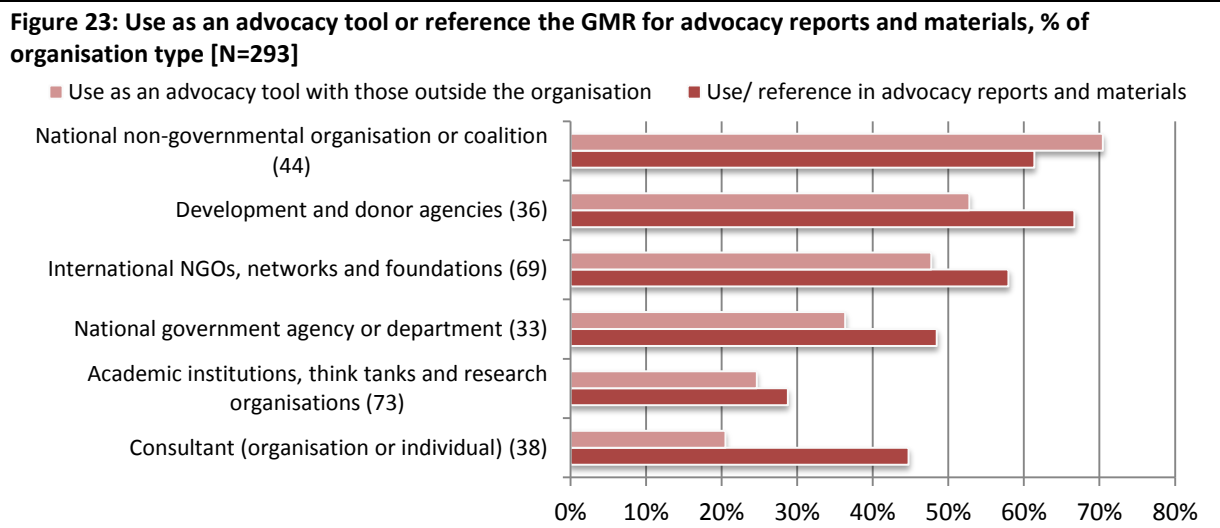
One example of using the GMR for policy advocacy has been to advocate with the government on applying the school readiness concept to the children across the 0-8 year age range, instead of 0-6 years. The GMR has also been used to advocate with the Ministry of Education and Training to understand the needs for collaboration with the Viet Nam Women’s Union in raising awareness of education to parents.

Russia

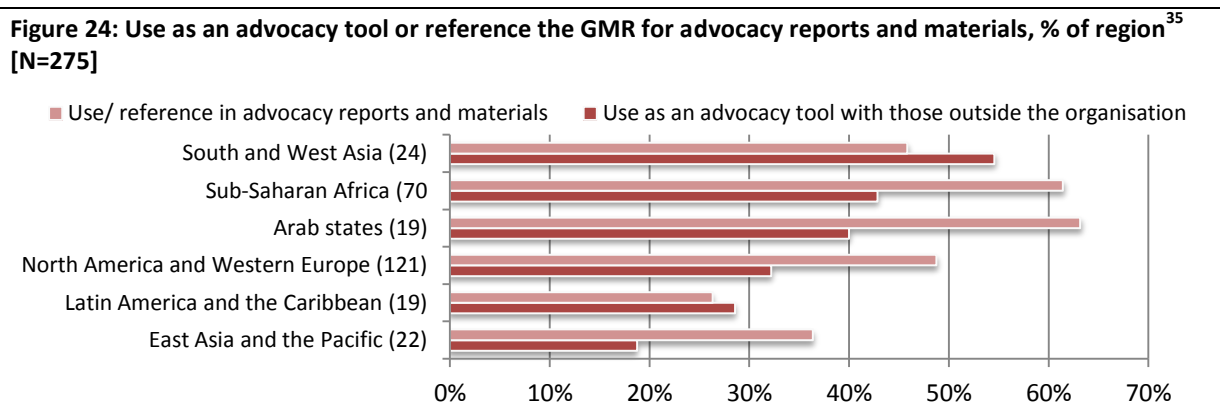
When defending the interests of educators, the Committee of the Workers’ Union of Public Education and Science of the Russian Federation have used GMR data on the impact of social stratification on the quality of education, and the impact of the welfare of the family on the educational success of children.

131. This is supported by the survey results, in which 50% of respondents who use the GMR stated that they have used it to develop advocacy reports and other materials, and 54% have used it to

prepare presentations at conferences and education events, whilst 41% used it as an advocacy tool with those outside their organisation. Development and donor agencies and national and international NGOs are most likely to use the GMR for advocacy activities (Figure 23). Interestingly, all respondents apart from national NGOs and coalitions are more likely to say they reference the GMR in advocacy reports and materials than to say they use it as an actual advocacy tool with those outside their organisation, indicating, perhaps, the nuanced emphasis on using parts of the report to support their existing agendas rather than using the GMR and its other products as specific stand-alone advocacy tools.



132. Use of the GMR for advocacy is higher in South and West Asia, Sub-Saharan Africa and the Arab States than other regions, and lowest in East Asia and the Pacific, with 19% of survey respondents in this region reporting using the GMR as an advocacy tool with those outside their organisation (although the differences in respondent numbers per region means these results should be treated with caution - Figure 24).



133. Amongst international interviewees (particularly donor agencies) the use of the GMR for internal advocacy was also noted. In these cases the GMR has been used as an authoritative source to promote the resourcing of education programmes within the wider organisation, using the GMR’s information on education financing, effective progress and the shortfalls in reaching EFA goals in order to state their case for education programming. This is supported by the survey where 70% of both INGOs and donor and development agencies stated that the GMR is a source of analysis that influences strategy, programming and/or policy within their organisations.

³⁵ Note that Central and Eastern Europe and Central Asia were omitted from analysis of this question due to low response numbers

134. The tone of the GMR's messages is important for the usefulness or otherwise of the GMR to stakeholders for both internal and external advocacy. In some cases critical or debatable evidence on a particular country has undermined the traction the GMR has had as an advocacy tool with government stakeholders (such as in India or Viet Nam), whilst in other cases some INGO and bilateral interviewees commented that key messages (e.g. on the financing gap) had been perceived as an almost unassailable challenge that was difficult to turn into messages that would engage donors and governments. For example, one GMR donor reported that the GMR's 2013/14 key message about the number of those still not learning had added weight to existing plans to stop financing education programmes, as their limited resources could be used to better effect in other sectors. This balance of holding stakeholders to account whilst encouraging continued engagement is, of course, extremely complex and different stakeholders will view it differently depending on their position and relationships with others in the policy discourse arena.

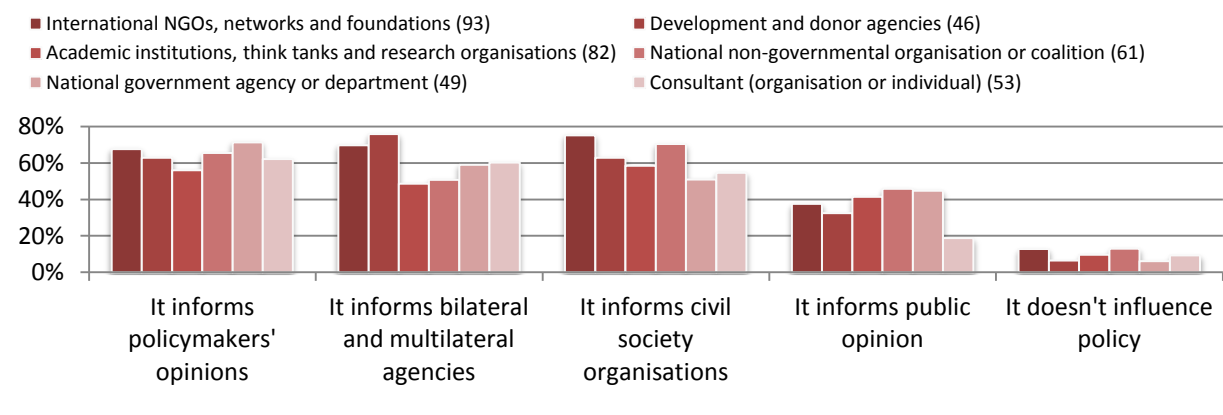
Use of the GMR in high level policy discourse and policy-making

135. At the international level of policy dialogue, the GMR has good circulation, awareness and use amongst relevant stakeholders, and there are numerous examples of its direct use to inform policy and strategy. GMR data analysis around inequalities and inequities (resulting in the WIDE database), for example, have been drawn upon in the launching of the Global Education First Initiative in 2012 and the Learning for All Ministerial meeting at the World Bank in 2013 as well as being a key source of information and analysis in the Global EFA meetings and the discussions of the CCNGO/EFA. The GMR analysis and data has also been used in shaping the post-2015 agenda, such as in the High Level Panel Report on Post-2015, and its recent work on education financing has been influential in the run up to the replenishment drive for the GPE (with five of the ten reference documents in its strategy for the Replenishment Meeting drawing substantially on GMR analysis). Bilateral and multilateral agencies have also utilised the GMR data and analysis in the development of their education strategies (it is cited sixteen times for example in *Learning for All: DFID's Education Strategy 2010-2015*).

136. The GMR's presence within the international policy arena is strong, therefore, as an informing document on both thematic issues and EFA progress. Survey responses also indicate that this influence amongst international actors extends into their relationships with national policy-makers, with 72% of donor and development agencies stating that they use the GMR in national policy and strategy development processes (policy briefings, drafting policies and strategies etc). This is backed up by the international interviews where INGO, donor and multilateral interviewees also confirmed their use of the GMR in top-level negotiations on policy and planning with governments in the global South.

137. However, the influence of the GMR within the domestic national policy discourse is more mixed. Overall, 47% of respondents who use the GMR in the survey stated that they used the report in national policy and strategy development processes, with the rate for national government agency or department personnel reaching 67%. In general, the majority of survey respondents are also of the view that the GMR influences education policy most by 1) informing policy-makers' opinion; 2) informing civil society organisations; and 3) informing bilateral and multilateral development organisations (whilst the UNESCO field office survey indicated 2) and 3) as the most important routes into national policy discourse). Broadly, the emphasis on these different routes into policy discourse tend to align with the organisational groups of the respondents (Figure 25): development and donor agencies are more likely to think that GMR policy influence is through bilateral and multilateral agencies, national governments are more likely to think it is directly to policy-makers, whilst international and national NGOs are most likely to think it informs civil society organisations.

Figure 25: Perceptions of survey respondents on how the GMR influences national education policy dialogue, as % of respondents' organisation type [N=384]



138. There are also examples of relatively direct policy influence of the GMR from the country case studies, which point to four main routes into policy-making discourse:

a) Benchmarking

Some government respondents in Senegal, Brazil and India stated that they use the report to compare to other countries in the world, or more often the region; this was a positive use of the data even where other, national sources were seen as more reliable for internal use (Senegal, Brazil, India).

Box 16:

Brazil

Some policy-makers said that they use the data provided to benchmark Brazil in the international scene, considered important in a globalised world. However, the figures provided are not useful for the discussion or the processes in Brazil. INEP (the National Institute of Educational Studies and Research) provide a great amount of up-to-date data, which is the main source feeding into educational policies.

Senegal

Despite some disagreements about the GMR data on Senegal, the Ministry of Education still finds it a useful benchmarking tool. The Direction of Education Research and the Planning (DERP) compares the performance of the country with countries in the region of the same socio-economic level. The data are thought to be the most useful aspect of the GMR.

b) Shifting priorities

There are some examples of the GMR contributing to the momentum around an issue or raising its importance on the policy agenda where it has coincided with existing debates, although the extent of the direct influence of the GMR in these cases is hard to assess.

Box 17:

Kenya

A number of policy initiatives in Kenya have coincided with GMR themes which supported development partners' and CSOs' lobbying on these issues, such as: the National Gender Policy in 2005 and Education Gender Policy in 2007; the National Literacy Survey to establish the literacy level in the country in 2006; ECCE included in basic education in the National Education Sector Support Programme in 2013 and the creation of a National Council for Nomadic Education (following the 2010 marginalisation report).

Russia

After the publication of GMR 2007, Russia launched an ambitious program to improve the quality and availability of early childhood education, and Moscow became the place where UNESCO's World

Conference on ECCE was held in 2010, with financial support from the government of the Russian Federation.

UK

GMR messages about girls in and out of school and the multiplicity of reasons for gender disparity in education and development were picked up by the BBC in their morning radio programme, Today, in association with Malala’s campaign on girls’ education.

c) Policy development tools

Some government officials have reportedly used recommendations and examples from the GMR to inform existing policy development processes and strategies.

Box 18: Policy development

Senegal

The Directorate of Education Research and Planning drew on the 2005 report on quality in the development of policy aspects related to cognitive skills and citizenship in the new EFA National Action Plan, the Quality Improvement Equity and Transparency Program (2013-2025).

Viet Nam

The GMR on Early Childhood (2007) was reportedly used by a World Bank education official for drawing lessons for preparing the “School readiness” project in 2010. The director of a mountainous province made the decision to focus their scarce resources to build student-friendly schools based on the lessons learnt from Box 4.10 (Chapter 4, GMR 2005) because he realised that at provincial level he could make decisions to influence only one of the seven factors for good quality of teaching and learning: “enabling inputs for quality teaching” through creating “good places to learn”.

d) Reacting

There are several instances where politicians or high level government officials respond to a fact emerging from the report or significant media attention around it at the time of the launch. Clear examples emerge from Lebanon (rise in attention to ECCE after the 2007 GMR) and India, and there have been additional examples of this kind reported by the GMR. For example, the latest GMR management report states “the Nigerian Minister of State for Education, Mr Nyesom Wike, at a ministerial news briefing in July ‘regretted the current EFA Global Monitoring Report, which ranked Nigeria as one of the countries with the highest level of illiteracy. [It is] based on this premise that the Ministry of Education has intensified efforts in the task of eradicating illiteracy’”.³⁶ It is not possible to deduce whether such public reactions have produced longer term policy impacts; in Lebanon, non-government interviewees thought that official statements in response to launches were rarely followed by actual changes.

Box 19: India

In February 2014, a question was raised in Parliament regarding illiterate adults. The question was based on the 2013/14 GMR, specifically asking whether the figure in the report on illiterate adults is correct, whether this figure has declined and what the government is doing to correct this.

139. These are all routes into the policy discourse level of the TOC, along with a more intangible and diffuse informing of different stakeholders’ views on the education context and issues. The subtle chains of contribution to actual policies from this discourse are difficult to detect. It is likely that the report has had an implicit influence on some actors and some governments which may have been under-reported, whilst equally in other places such influence may have been exaggerated.

140. However, whilst these examples indicate that, where the GMR is known and is accessed, it has been useful in prompting ideas and informing policy dialogue, the case studies also highlight that this is happening in an ad hoc way and that in some cases (notably in Brazil and Russia), respondents

³⁶ Management report Jul-Dec 2013

felt that many of the issues covered in the GMR were no longer relevant for them, having (officially) reached close to key EFA goals (Box 20:).

Box 20:**Brazil**

Brazil integrated the principles of EFA in the orientation of their policies in response to the Jomtien commitments in 1990, giving them a 'head start' on the EFA goals established in Dakar. EFA targets are well entrenched in national plans and policy. The first GMR (2002) was influential in those policies, and in particular the National Education Plan (2002). Use since then has been limited however; the report does not permeate the day to day work of the policy-makers of the lower levels of the ministry and at state level because it is not well known and they cannot read in English.

Russia

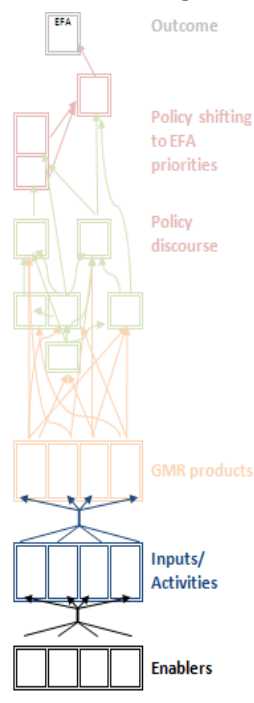
Policy-makers stated that both the policy environment and the realisation of those policies in Russia surpass the EFA goals. Though there is still a long way to go in some areas, notably ECCE and education quality, Russia is much further ahead even in these areas than other countries. The recommendations in the GMR, therefore, are not seen as applicable. Policy-makers felt that this was because EFA goals were not relevant for Russia, rather than it being an issue of the GMR itself. Other stakeholders, however, thought that if there was better analysis of those at-risk communities which are still excluded or marginalised from education, this might increase the relevance and usability.

141. Many international interviewees, as well as case study respondents, also commented that the size of the GMR is somewhat overwhelming for policy-makers and few would be likely to ever read a GMR in detail. Whilst the GMR produces other, more manageable outputs (e.g. policy papers) the case studies indicate that awareness of these at national levels is limited, and the need for more targeted products for policy-makers was raised. This is particularly noted by international interviewees from INGOs and donors in relation to broadening the audience of the GMR beyond education sector policy personnel to include those also closely involved in education policy decisions at both international and national levels, such as finance ministries and agencies, human resource departments and health ministries/agencies. Engagement of such stakeholders, these interviewees felt, required different targeted policy products that the GMR was not yet fully exploring, although the challenges of such cross-sectoral reach were recognised and the efforts made in the latest GMR to do this were noted.

142. Importantly, however, the basic reach of the GMR remains too limited for sustained, systematic policy influences at national and particularly (for federal states) at sub-national levels. As noted in previous sections, amongst policy-makers in the case studies, awareness of the report and other GMR products has been limited, with the analysis and messages it contains failing to reach the hands of many involved in policy-making. The potential of the GMR for supporting EFA progress indicated in the positive examples from case studies and international interviews is therefore only being partially realised.

4.2 Governance and financing

TOC areas relating to governance and financing



143. Governance and financing relate mainly to the lower level foundations of the TOC, providing the enablers that feed into, frame and oversee the effectiveness of the GMR's activities and inputs in producing and disseminating quality GMR products.

4.2.1 Effective governance

Key findings for governance

The governance arrangements for the GMR are not formally specified and, in practice, are played out in the relationships between UNESCO (as the host organisation), the Advisory Board, and the management and executive power of the GMR Director. This lack of formal governance structures and processes has been retained intentionally to reduce bureaucracy and enable the GMR to remain flexible in how it operates and manages each annual cycle of production and dissemination.

To date the balance of these relationships has been maintained due to good working relationships and understanding between individuals in the agencies involved, and the independence of the GMR has been protected. This is the perception of the majority of international informants and stakeholders, although some confusion exists about exact roles and responsibilities. There are also some concerns over the range and weight of different voices represented on the Advisory Board (in particular the need

for greater representation from the South), with potential risks to the impartiality and representativeness of the advice that the GMR receives from this body.

The 2009 evaluation of the GMR recognised that, although these undocumented relationships 'worked' to an extent, the overall effectiveness of the GMR could be improved by greater clarity in roles and responsibilities through a partnership agreement.³⁷ No changes have been made since then, however.

144. In considering the effectiveness of the governance structure for the GMR we considered the following aspects:

- the governance and management structure of the GMR and its accountability, including the critical factors in governance that assure independence of the GMR;
- the clarity and definition of the governance and management roles and responsibilities of the GMR team, Advisory Board and UNESCO; and
- the effectiveness of the Advisory Board and representation of the main stakeholder groups.

Accountable and representative governance

Governance and management arrangements

145. Governance is the task of setting the organisation's goals, direction, limitations and accountability frameworks and ensuring that these are adhered to: it is distinct from management (organising the work) and operations (doing the work), although in most organisations there is some overlap. The GMR has no designated governing body or governance mechanisms in place so that its governance and oversight are located within two critical relationships, with UNESCO and with the

³⁷ Universalia (2010), *Evaluation of the Global Monitoring Report Final Report. Volume I*, Recommendation 7

Advisory Board. The development of these relationships by all parties has been firmly based on maintaining a 'light touch' approach to reduce process overheads, allowing responsiveness and rapid decisions by the GMR team during the tight production cycle, and to limit the time investment required from those external to the GMR team.

146. UNESCO hosts the GMR but the precise governance and management relationship appears to be intentionally undocumented and flexible, in order to preserve the independence and flexibility of the GMR and, on the other hand, to allow UNESCO its ownership of, or its distance from, the report and its messages, as appropriate. UNESCO provides a small amount of funds annually and support in the form of office space, and administrative, communications and other logistics, including, indirectly, the important contribution of the UIS.

147. The GMR is dependent upon the UIS for data that is organised and presented in geographical or thematic views according to the needs of the GMR. This relationship, similarly, works with informal arrangements, built on experience and trust and is not underpinned by formal agreements, procedural documents or any financial transaction. Such procedural and management relationships with UNESCO and with UIS are a delicate balance, dependent on the goodwill and mutual understanding of individuals and, therefore, vulnerable to changes in personnel in any of the organisations.

148. To counterbalance this ambiguous relationship with UNESCO, the GMR team, and several of the informants from international stakeholder and donor organisations, regard the Advisory Board, with its broad-based membership, as a de facto governance body and the way to ensure the independence and impartiality of the report. The composition of the Advisory Board is decided by UNESCO's Director-General in consultation with the Assistant Director General (ADG) Education and the GMR Director. There is some confusion among Advisory Board members about the precise role of the Board in the absence of clear governance mechanisms, with different understandings of its purpose in relation to representation, technical advice, accountability or governance. However, it is an *advisory* body, tasked to support the GMR in its original vision and purpose and any long-term development plans: it has no accountability role. The Advisory Board meets once a year and its TOR are as follows:

The Advisory Board for the GMR will play a consultative role. It will provide oversight, guidance and suggestions in the following areas:

- *The vision, purpose and objectives of EFA Monitoring Reports and their consistency with the Dakar Framework for Action mandate*
- *The evolving national and international context for implementation of the Dakar Framework for Action*
- *Future GMR themes, priorities and approaches*
- *The long-term development of the GMR*
- *The identification of emerging problems, priorities and concerns in the international environment with a bearing on the EFA agenda*
- *The quality and timeliness of EFA statistics and data*
- *Sources of expertise, knowledge, information and funding*
- *Communications and outreach for the Report, including advocacy, publications and partnerships.*³⁸

³⁸ *Education for All* Global Monitoring Report, Terms Of Reference for the Advisory Board [undated]

149. With a single annual meeting of up to 25 representatives, several Advisory Board members commented that the effectiveness of the debate and discussion within the Board depends, to a large extent, on the chairperson, who is designated for up to three years. A report on each meeting is produced by the GMR team as the Board's secretariat, though the clear identification of recommended action points and follow-up on these actions that would enable Board oversight has been variable across the reports (the latest report of the 2013 meeting representing the best example in this respect).

150. GMR donor organisations are represented on the Board by four or five members: a separate meeting for all donors is held annually at which the GMR team reports on issues such as funding status, sustainability and commitments, the organisation and representation of the donors on the Advisory Board, and reporting systems concerning the impact of the GMR. In 2011 donors made the point that "the apparent ambiguity in the management structure of the GMR *vis-à-vis* UNESCO in relation to the independence of the Report makes it difficult for them to lobby for greater funding for the Report within their respective organisations".³⁹

Management and administration

151. GMR staff, including the Director, are recruited through standard UNESCO procedures. The UNESCO ADG Education sits on the Advisory Board and is the GMR Director's line manager. In practice, by mutual agreement, the ADG's role has been not to get involved or engaged with the affairs of the GMR other than the extent to which he sits on the Board. This has been in line with the 'light touch' approach through which the GMR has sought to maintain flexibility, but it does leave a management and accountability gap.

152. Despite the lack of documented arrangements, the GMR is integrated into UNESCO's administrative procedures. Funding for the GMR comes to UNESCO and is managed through a special account and contracting, payments and accounting are all done using UNESCO systems: oversight and control of accounting is therefore UNESCO's responsibility, whereas oversight and control of planning and budgeting rests principally with the GMR team.

153. In operations, GMR press releases are issued by the UNESCO DPI and the hard copy report is distributed through UNESCO field offices, and usually launched by them although, as the 2009 GMR evaluation noted, "on issues such as the coordination of launch activities, updating distribution lists and supporting distribution, the GMR does not appear to be fully integrated into the workplans of the UNESCO regional or national offices".⁴⁰ This was confirmed in a number of country case studies.

Representativeness of the Advisory Board

154. UNESCO is strongly represented on the Advisory Board: it has two *ex officio* members (ADG ED and UIS) and three to five other members including from the UNESCO institutes (IBE, IIEP, UIL) and directors of at least two regional UNESCO offices. The other multilateral EFA convening agencies (e.g. UNICEF, the World Bank) are represented by up to five members on the Board. Representatives from regional institutions and networks in the global South, such as the African Union, the Southeast Asian Ministers of Education Organization (SEAMEO) and the Commonwealth Secretariat nominate (via the Director-General) developing country representatives to three to four seats. CSOs (up to four members) are also represented to increase regional and thematic representation. In addition GMR Director can nominate "up to three independent experts to serve as an Advisory Board member for one year, selected for their competence in specific areas of relevance to the GMR, including research, statistics and communications/outreach" (these additional members often form the small Expert Panel that feeds into the content development of the report).⁴¹

³⁹ 2011 Funders meeting minutes

⁴⁰ Universalialia (2010), Evaluation of the Global Monitoring Report Final Report. Volume I

⁴¹ Terms of Reference for the Advisory Board

155. Amongst the Advisory Board members interviewed, there were mixed responses to the levels of representation and balance of inputs within the Board. A slight majority felt that the Advisory Board enabled a balanced participation of all members, but several Board members (including donors, INGOs and multilateral agency representatives), as well as by some external INGO and campaign networks, expressed concern that there are uneven levels of participation and influence by Advisory Board members, both within the annual meetings and outside. These concerns included both the lack of engagement by some Board members (with a single annual meeting failing to instil a strong sense of membership) as well as the very full engagement of others, with more than one representative of donors on the Advisory Board reporting that they routinely have contact or meetings with members of the GMR team outside the annual Board and others working with the GMR team on specific pieces of work (e.g. on collecting evidence etc.). Several Advisory Board members (from across the INGO, donor and multilateral representatives) also expressed the view that, despite action following a recommendation made by the 2006 GMR evaluation,⁴² the voice of the global South on the Board is still not sufficiently strong, which could risk the impartiality, or perceptions of impartiality, of the advice provided by the Board.

4.2.2 Effective financing

Key findings for financing

The current pooled financing structure is considered to have the merit of ensuring the GMR's independence. However, bilateral donors dominate and are always subject to changes in internal government policy and constraints on the longer-term predictability of their funding. As a result the GMR has had no certainty of funding beyond one to two years at best and sometimes only for a single report's lifecycle. This short-term funding basis is inherently unstable, has created financial uncertainty and militates against medium- to long-term strategic planning for the GMR.

In principle, widening the range of funders, while maintaining the pooled funding model, is favoured by Advisory Board members and other international stakeholders. However, the internal constraints of funders are an intractable issue (noted also in the 2009 evaluation) and the problems involved in getting new or more predictable funding cannot be underestimated. There have been some successes in doing this in recent years with one-off funding from two foundations and a new bilateral donor but this has required significant staff time to secure.

Overall the GMR is considered to be good value for money by representatives of its funding organisations, on the basis that monitoring the EFA goals is essential and no single agency could do it for the cost of their individual annual donations. The GMR has had to make cost-saving decisions over the last few years due to increasing requirements to demonstrate value for money and limited funding, but has maintained core investment in research to ensure the quality of the GMR products.

156. The evaluation considered the following aspects:

- The financing structure in relation to the aims of the GMR;
- The contribution, or otherwise, of the funding model to transparency and independence;
- Financial stability and financial security since 2010;
- Whether there is sufficient flexibility in the funding model for the GMR management and for donor organisations; and
- To what extent the GMR is considered value for money and how that is demonstrated.

⁴² Universalia (2006) Formative review of the Education for All Global Monitoring Report. Volume I – summary report. Recommendation 6: To encourage ownership and use of the report, particularly in developing countries, the Editorial Board should be expanded to include government representatives.

Funding model: effectiveness and stability

157. The financing structure has consistently had 12-14 different donors (see Table 5) and is considered by most informants to have the merit of ensuring the report’s independence, in that no one donor organisation has dominated. The funds are pooled, which is also seen to help the independence of the GMR operations. Most of the funding comes from government bilateral donors, although the GMR team has secured one-off funding from new partners (the Mastercard Foundation and Open Society Foundations) in recent years. Bilateral agencies are subject to changes in internal government policy, which is a potential source of instability and has been an actual source of delayed funds release on several occasions. For example, in 2011, a concern was raised that the Netherlands and the United Kingdom, which had to date contributed up to 40% of the total funding, might not have been able to continue due to changing circumstances with their aid budgets.⁴³

158. The donors typically have internal plans that budget for funding to the GMR over three to four year periods, but nonetheless annual funding plans must still be submitted and approved within this framework, so that the GMR has had no certainty of funding beyond one to two years at best and sometimes only for a single report’s life-cycle. This short-term funding basis is inherently unstable, has created financial uncertainty and militates against medium-to long-term strategic planning. In 2012, GMR Director “emphasised that, for planning purposes, it is preferable for contributions to be made through long-term commitments. This is important because staff costs account for nearly two thirds of the overall budget, and so funds are needed throughout the year. In practice, current commitments to the Report are for one or two years only and often arrive in small disbursements”.⁴⁴

Table 5: Funding commitments by GMR donors 2010-2015 (US\$)

Country	2010	2011	2012	2013	2014	2015
Australia		481,283	916,256			
Canada						
Denmark	255,000	255,000	255,000			
Finland			129,870	129,366		
France		56,577	24,510	25,057		
Germany	136,054	480,110	439,149	463,575	68,966	206,897
Ireland	196,335	142,653	193,050	203,805		
Israel						
MasterCard Foundation		225,110				
Open Society Foundations				45,000		
Netherlands	5,039,535	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Norway	502,553	514,578	536,874	486,721		
Sweden	102,067	445,440	448,860	462,120		
Switzerland	180,505	820,697	207,029	545,815	563,698	563,698
UNESCO	75,000	75,000	37,500	33,755	35,500	36,000
United Kingdom	432,900				1,735,537	1,735,537
GRAND TOTAL	6,919,949	4,496,448	4,189,098	3,395,214	3,403,701	3,542,132

Source: GMR management report Jul-Dec 2013

159. The question of widening the range and number of donors funding the GMR has been raised on several occasions since 2010 in both the Advisory Board and donor meetings. For example, several

⁴³ 2011 Donor meeting minutes

⁴⁴ 2012 Donor meeting minutes

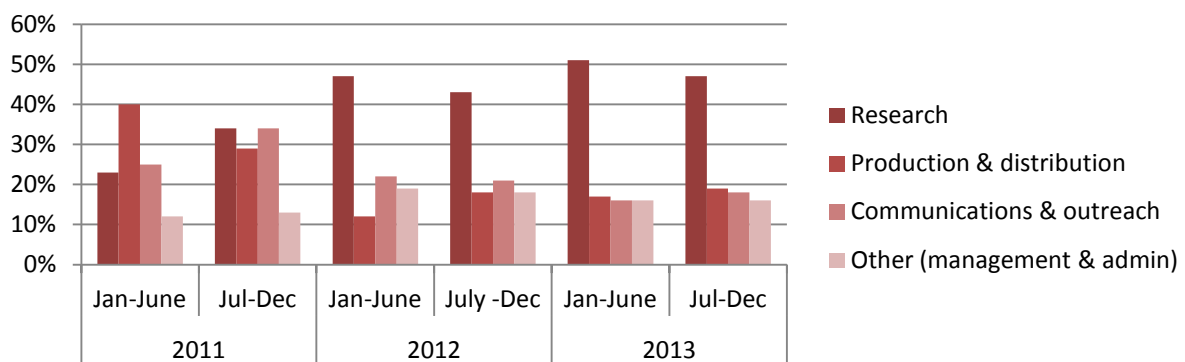
donors questioned why other EFA convening agencies were not also contributing financially to the Report,⁴⁵ and at the same meeting it was acknowledged that, whilst there was a need to look for new funding partnerships, “this could increase transaction costs and had the potential to impede the Report’s independence. Several donors also reiterated their concerns of a move away from pooled funds”.⁴⁶

Flexibility in the funding model for the GMR management

160. Whilst the overall funding level for the GMR has remained steady (at around US\$5.1 million per year⁴⁷) the annual effort to secure funding from existing donors and to find new donors has absorbed considerable GMR staff resources and time. A significant step was made for 2014 in reaching an agreement with UNESCO to reduce the Programme Support Costs they take from the GMR funds from 10% (the norm for extra-budgetary projects such as the GMR) to 5% in recognition of the value of the GMR to UNESCO. This has been an ongoing source of concern to donors and is likely to add up to \$250,000 per year to the GMR’s budget.

161. Once funds have been assured, budgeting and planning is largely the responsibility of the GMR Director, who reports retrospectively every six months to funders. Significant cost savings have had to be made on an annual basis during the period 2010-2013 and these reflect, to some extent, the advice of the Advisory Board and the 2009 GMR evaluation (for example, in improving outreach and communications) and the priority of the GMR team to avoid jeopardising their capacity for high quality research and analysis within limited and uncertain budgets. Consequently (see Figure 26), while staff costs have slowly increased (arising from changes in UNESCO contracts and the withdrawal of UNESCO financing of a GMR staff member), the GMR team has made significant investment in communications capacity (2011) and has succeeded in reducing other direct costs, such as production costs, while maintaining the budget for research at a fairly steady level.

Figure 26: Expenditure by operation (percentage of total budget) 2011-2013



Source: GMR management reports

Value for money

162. Overall the GMR is considered to be good value for money by representatives of its donor organisations, on the basis that monitoring the EFA goals is essential and no single agency could do it for the cost of their individual annual donations.

163. However, DFID, overall the largest funder of the GMR, with other bilateral donors, is under increasing pressure from their governments to report against value for money indicators, to understand better the cost drivers and how these might be changed in any investment.

⁴⁵ 2011 Donor meeting minutes

⁴⁶ ibid

⁴⁷ Management reports 2010-2013: Annexes: annual budget estimates

164. Since 2011, there has been discussion in donors' meetings on the need for GMR to provide some donors with evidence of effectiveness and impact against performance indicators. DFID requested the GMR to develop a logical framework and business case to ensure approval of DFID funding from 2013-2015 and to link payments to specific milestones: this documentation was also used as the basis for agreement with the Swiss bilateral donor, and has, according to the GMR Director, been useful in providing a better articulation and shape for the GMR to report against in its six-monthly management reports to funding agencies.

165. In 2012 and 2013, the GMR introduced a series of key performance indicators of output (e.g. number of background papers commissioned, see Table 3 above) and some outcome measures (e.g. number of global, national or local development policies or programmes influenced by the GMR), for which the evidence base and method of assessment is not clearly defined.

166. In addition, in 2013, the GMR has begun to develop a set of Value for Money (VfM) indicators. These identify how much is spent on core functions, including on producing the report for each reader, and the costs for each event and participant at an event. The indicators to date are reported as follows:

- a. *Cost per reader is calculated by the cost of producing and distributing the Report including the number of copies downloaded. Current estimates indicate that cost as being \$27.99. While earlier comparisons are not available, it is likely that this has reduced in recent times given cost-savings in identifying new graphic designers and printers at lower cost.*
- b. *The cost per event includes the total events-related expenditures divided per the number of events. This includes a spectrum of different types and sizes of events – ranging from the global launch to smaller national events to which the GMR contributes. Costs primarily include money spent on travel for speakers and GMR team members, interpretation, hiring of the venue and hospitality (coffee breaks, lunches for key participants etc.). On average, the cost per event is around \$4,200.*
- c. *Taking account of how many people attend each of the events, the cost per person at each event works out at approximately \$48.*
- d. *From a different perspective, the cost per 1000 media reach is a proxy for the amount spent on communications-related activities to reach people via the media – as such, it shows that the GMR spends \$0.70 in order to reach every 1000 people who read a media article that cites GMR evidence.⁴⁸*

⁴⁸ Management report Jul-Dec 2013

4.3 Post-2015

Key findings on post-2015

Evaluation informants were asked to reflect on what changes might make a monitoring function and report more useful, taking account of the emerging post-2015 debate. Most responses were, implicitly, predicated on there being a post-2015 Global Education Framework.

In general, stakeholders foresee a strong continued need for monitoring in the education sector, and recognise the key relationships with UNESCO, as the holder of the UN mandate for education, and UIS with its responsibility for global education statistics.

It is likely that the new international architecture for development goals and the monitoring function(s) developed for these will entail new accountability demands for an education monitoring function. There is a strong feeling that voices from the global South and from civil society will need stronger representation in the consultation and advisory inputs to new monitoring arrangements in order to strengthen and maintain global representativeness, legitimacy and authority.

The GMR has to date maintained a good balance between thematic and EFA monitoring analysis. There is potential for greater flexibility in how these elements are packaged (e.g. alternating annual products, splitting the elements into separate products etc.), but an annual monitoring output is seen as an important minimum. The exact structure of any future education monitoring products will need to respond to the requirements and demands of the new indicators and monitoring structures, which may define what is possible. However, it is strongly felt that the post-2015 arrangements must have a monitoring function that meets the quality standards established by the GMR.

167. The GMR team have played an important role in the post-2015 education agenda, highlighting and informing on issues of financing, measurability, equity and quality through a range of products, presentations and partnerships.

168. The Advisory Board and GMR team have considered issues of continuity over 2015 and there is concern about losing momentum and financial continuity if there are structural, organisational or financing changes.

169. Evaluation informants were not asked directly about post-2015 options for the GMR but were asked to reflect on what changes might make a monitoring function and report more useful, taking account of the emerging post-2015 debate and the renewed emphases on equity, quality, and global relevance of new development frameworks. Most responses were, implicitly, predicated on there being a post-2015 Global Education Framework, either as part of, or providing the detail of, a GDF.

170. In general, interviewees foresee a continued need for monitoring for education: many identify a need for more effective regional and national monitoring and that dissemination, awareness and exploitation of the monitoring reports and related knowledge products needs to be improved, particularly in developing countries and among CSOs of the South.

Hosting

171. International and national interviewees recognise that UNESCO has the UN mandate for education and has prestige and legitimacy in much of the developing world. UIS has responsibility for global educational statistics and that is an important partnership link in the educational monitoring function.

172. The hosting or collaboration arrangements that might be required to monitor a GDF that includes only broad, cross-sectoral goals, without sector specific underpinning, were not addressed as such a scenario would depend very heavily on how any umbrella monitoring function was established.

Governance

173. Many of those international interviewees closely engaged with the post-2015 process (including INGOs, and Advisory Board members from donor organisations) identify that a new architecture may bring with it a need to be accountable to others within the UN structure (as keepers of the GDF) and to the global community more widely, and that this will bring an impetus to rationalise and clarify the roles and responsibilities for the education monitoring function. There is a strong feeling that the voices from the global South and from civil society will need to have stronger representation in the consultation and advisory inputs to new monitoring arrangements to strengthen and maintain global representativeness, legitimacy and authority.

Finance

174. The post-2015 architecture is likely to be more coherent and inclusive of international agencies, which might provide better opportunities for all stakeholders to take financial responsibilities.

Branding

175. The UNESCO brand is seen by many, especially in the global South, as a guarantee of the report's credibility and authority: the linked EFA-GMR brand and logo is increasingly recognised and accepted as a byword for quality analysis in the education sector. The post-2015 arrangements are likely to bring some new terminology and brands, however, and the applicability of the EFA brand within this will be dependent on the final shape of the GDF and its monitoring function(s).

Structure

176. Findings on the structure of the GMR are varied and suggest that different audiences, and individual preferences, steer attitudes to the structure. There is wide agreement that the post-2015 arrangements must have a monitoring report that is of the quality established by the GMR in its use of data, analysis of policy and presentation of key messages. However, views are more mixed concerning the thematic elements and on the usefulness of different knowledge products and channels of dissemination (as discussed in previous sections). Whilst the thematic elements of each report are widely admired and valued, it was commonly noted amongst international interviewees that their inclusion within a single volume with EFA progress monitoring often overshadowed the monitoring elements, particularly as the theme is the main focus of communications around each GMR. However, those interviewees regularly using the monitoring aspect are well aware of the consistent monitoring element in the GMR, and the majority perceived the balance of content between monitoring and theme was about right. Views were split however, on the importance of keeping them bound in a single, lengthy volume, with some stating that this was important as a solid reference text and basis for subsequent targeted GMR products, whilst others noted that the report was too unwieldy for many users and greater flexibility in the annual report format might be required (e.g. alternating a slimline monitoring report with a biennial thematic/monitoring report or splitting the thematic and monitoring elements into separate reports).

177. It was also noted by some interviewees that decisions on report structure will be dependent on the post-2015 education indicators to be monitored, and the requirements and mandate of the post-2015 monitoring function as a whole, and for education specifically, that will have implications for the capacity and focus of the future education monitoring team. Post-2015 discussion has raised the question of targets being established that take into account regional or national contexts and this idea has resonated with the identified interest in making the monitoring function more directly relevant to regional or national contexts.

5 Conclusions and lessons learned

Introduction

Conclusions based on main findings

178. Based on the findings of the evaluation summarised in section 4, we present here conclusions and the lessons learned. The discussion is based on our analysis of the evaluation findings. No new evidence is introduced in this section.

179. The conclusions and lessons learned are inevitably forward-looking and issues concerning the hosting, governance, finance, branding and structure of the post-2015 education monitoring function are therefore integrated into the discussion below.

Post-2015 landscape

180. The EFA mandate of the GMR will cease in 2015: there will be a monitoring function for education and an ongoing mandate for UNESCO and UIS within that function but it will not be “business as usual” for the GMR and the machinery for monitoring will work within a new international architecture for the agreed GDF. It will also need to mobilise expertise for the increased scope and technical demands of the education goals.

181. At the time of writing details of the structure of the GDF are emerging and subject to discussion. However, it seems most probable that there will not be a separate education framework but that an education goal will be included in the GDF with a number (five or six) of target statements, supported by indicators, which will be more technically robust. There may also be cross-cutting goals in the GDF, for example for equity, that imply a need for data and analysis that includes education.

182. There is a strongly stated intention to ensure that the GDF is designed to be, and is perceived to be, relevant globally with specific concern to have political traction in developed and middle income countries as well as in lower income developing countries. There is also an emerging consensus that education priorities will include access, equity, equality, quality, skills and lifelong learning, and the need to take on the challenges of defining and reaching global agreement on the indicators for these areas, with specific technical and political issues around quality.

183. The changes post-2015 will therefore require a monitoring regime able to meet the technical and political challenges arising from the quality and equity agendas and the potential inclusion of targets that are fitted to national or regional contexts.

184. The education monitoring function (EMF) will also need to fit within the architecture for monitoring the GDF. Politically this will be headed by and accountable to the Secretary General’s office and is likely to involve a number of sector-specific agencies: UNESCO is very likely to retain the mandate for education. Acknowledging some of the lessons from the MDGs, the UN’s Sustainable Development Solutions Network (SDSN) draft report on indicators noted that “cooperation between international agencies and National Statistics Offices was missed by the MDG process and must be strengthened”,⁴⁹ an area in which UIS has demonstrated achievements. Financially, the establishment of an overall monitoring function as part of the GDF may attract more substantial and longer-term funding to this function (and the sector-specific monitoring within it) that could address some of the intractable funding issues the GMR has faced in monitoring the EFA framework.

⁴⁹ UNSDSN, May 2014, *Indicators for Sustainable Development Goals, working draft*, p.5

185. The post-2015 architecture for monitoring, advocating and driving a political discourse for the development goals should not become disjoint, as befell EFA and the MDGs. The monitoring function for education will be part of a global mechanism to which it will have responsibilities, and from which it should expect more reliable support to fulfil its global function. Similarly, there will be a coherent set of responsibilities and relationships for dissemination, advocacy and policy response to findings.

186. The changing scope, mandate, organisation and institutional relationships may take time to prepare and establish systems. It is anticipated that goals and indicators will be adopted in September 2015 and, as the SDSN draft report suggests, the timescale in which the “international system, notably the UN organisations and partner institutions (including OECD, World Bank, World Trade Organisation and others), would have in place an accurate and meaningful annual reporting system” is 2018 at the latest.⁵⁰ Building on the work of UIS and GMR (and others) the education sector may be in a better position to respond to the changes than some sectors, but it will be necessary to work alongside all concerned for common approaches and efficient use of resources.

Value

Quality

Content and scope

187. The GMR has carved out a unique and valued position of quality and in-depth analysis of data that informs and contributes to the understanding of global education sector issues and progress towards EFA goals. It presents its analysis in innovative ways that facilitate and animate discussion of key trends and challenges for education.

188. The GMR has established and continued to strengthen a reputation for accuracy and reliability. The team has taken important steps to widen data sources and has a global voice in discussions about data coverage and quality.

189. Criticisms over timeliness of data are unavoidable given the source and the elapsed production time for the report. Such criticism does not undermine the analysis but can provide an excuse, in some countries, to dismiss the GMR.

Lesson learned: The level of attention to accuracy and reliability, and to the overall quality of analysis and argument for which the GMR is known, is a cornerstone of its reputation and must be carried forward to ensure the continued credibility and value of monitoring and policy support post-2015.

190. The selection of themes has been well aligned with issues in the sector and, in several cases, has provided an important guiding input to global and national debate and policy-thinking. With its more recent cross-cutting themes the GMR has increasingly been addressing the spirit as well as the letter of EFA, and, in the development of new products such as the WIDE database, has added value to growing concerns of equity that are likely to be important in post-2015 frameworks.

191. With its EFA mandate the GMR has been inevitably straitjacketed into following a traditional model of education in its presentation of evidence and analysis. Concerns have been expressed that, as a consequence, the report may have lost relevance in places where education contexts are, for example, driven by non-formal education, where data are often not collected systematically, or have moved away from certain EFA targets during the intervening decade.

⁵⁰ UNSDSN, May 2014, *Indicators for Sustainable Development Goals, working draft*, p.5

192. A parallel criticism is that the GMR too greatly reflects and relies upon Northern perspectives on education, similarly risking relevance in countries of the global South and, potentially, the loss of new or different perspectives and lessons. The limited global reach of the research and consultation base for the GMR detracts from perceived relevance and credibility in the South. These concerns should be taken seriously post-2015.

Lesson learned: The GMR’s ability to adapt and respond to both diverse education models and differing country relationships to global targets is critical to maintaining its relevance across all regions. This will be important in monitoring new global goals that may be more applicable to developed as well as developing country contexts and may have to relate more directly to regional or national targets.

Structure

193. The GMR team has been able to achieve a difficult balance between EFA monitoring and thematic analysis in its current reports, but there may be some merit in thinking more flexibly about how these elements are turned into specific products. However, the post-2015 global education goal is likely to require a review of the current structure for monitoring. Different partners in the post-2015 education architecture may have preferences concerning the structure, for example, for a stand-alone monitoring report, and the structure may need to align with that of other sectors’ monitoring to ensure coherence across the GDF monitoring function. The nature and level (national, regional, global) of the new goals, targets and indicators may also constrain the resources and capacity available for research and analysis beyond the monitoring role (e.g. monitoring complex equity indicators or more geographically diverse targets would require higher levels of input than current EFA monitoring).

Independence and impartiality

194. The GMR has maintained its valuable editorial and operational independence, supported by the Advisory Board. Its relationship with UNESCO has been carefully managed to mutual benefit and used appropriately by both sides. It is well understood that there is an inherent tension between independence and the position of the report as a lead UNESCO publication (and its perception as a UNESCO product in much of the world) but this has been handled well by GMR Directors and by UNESCO. The report’s editorial independence is understood and valued by all stakeholders, including the funding partners who might be identified as the risk to that independence.

Lesson learned: It will be vital that this independence is preserved and protected in any changed hosting and governance arrangements, and that it is seen to be preserved by all stakeholders.

Outreach

Reaching different audiences

195. The complexity of the GMR’s TOC, and the various routes to different audiences, would be challenging to any similarly resourced team. The GMR makes some links in the TOC very effectively, particularly among the international NGO, donor and development communities, using the team’s internal communications and dissemination capacity. However, the development across all these TOC routes to audiences is uneven: investment in media, social media and communications channels has been effective in reaching diffuse public audiences and some international audiences involved in international policy dialogue, whilst other channels necessary to get the report and its analysis into policy and decision-making processes (for example, through national policy-makers or national civil society) require more strategic thinking and development, particularly at national levels.

196. It is a general concern that in outreach planning the GMR team has not done enough to segment and understand their audiences so as to match messages, products and dissemination approaches to needs, although such work has started for specific audiences related to the theme of the last two reports. The TOC indicates the range of different players that may take GMR messages into the policy discourse, with different expertise, agendas and modalities. The GMR itself does not know enough about these different audiences for its global products, particularly at national levels, and its global mandate and limited capacity does not allow the systematic accumulation of such knowledge. Audience research and needs analyses, commissioned from organisations better placed than the GMR team itself, would have cost implications and priorities would need to be identified (with products and activities needing clear justification), but they would facilitate more effective and longer-term strategic outreach plans.

197. The GMR’s annual communication plans, developed around the specific annual theme of the GMR, have been effective at an international level and triggered important and influential responses. The strengthening of these aspects since the last evaluation has been impressive. However, the GMR’s increasing commitment to communication actions is not situated within a wider strategic approach to outreach and influence on policy at both international and national levels. Media impact has been effective in raising awareness of key messages, but risks becoming an end in itself rather than one of the numerous means to the policy-influencing end.

Lesson learned: Outreach planning needs to be more strategic and longer-term, with the aim of getting the correct GMR product into the right hands to meet real needs and to maximise influence.

GMR’s advocacy role

198. The GMR was established with a dual mission: firstly to undertake GMR monitoring and policy analysis and, secondly, to raise awareness about evidence-based policy conclusions through the provision of tools to support advocacy. It was recognised that evidence and analysis of such high quality must be disseminated, mediated and used to make a difference and play its part in achieving EFA. While not mandated directly to do advocacy work, the GMR was intended to hold countries to account in implementing EFA policies.

199. To fulfil this role the GMR team has taken communications and advocacy increasingly seriously. Some respondents in this evaluation made the case that monitoring and advocacy must always be separate functions, that any direct advocacy role undermines the credibility of the report or risks the perception of ‘pushing’ data in more challenging (and open to challenge) methodological ways to support advocacy messages. This is a legitimate concern, of which the GMR team is well aware and will need to continue to look at carefully to avoid risks to its reputation in the future.

200. The GMR’s relationship with UNESCO allows them to make common cause for communicating positive messages but constrains what the GMR can say about individual governments: it is not UNESCO’s role to hold countries to account and they have very effective machinery to avoid politically embarrassing statements. Recognising this constraint, the invaluable GMR material must get into the hands of people who can hold governments to account and move politically difficult advocacy messages into a plan of exposure and campaigning. GMR has made some effective alliances in past campaigns that can be increased and strengthened into more strategic partnerships.

Lesson learned: The GMR must maintain its delicate balance of monitoring and awareness-raising to avoid perceptions of direct advocacy undermining its credibility. However, through working more consistently with external partners other than UNESCO, the GMR can provide materials, tools and support to focussed and more extended advocacy actions beyond the capacity of the GMR team.

Global report vs. national relevance

201. GMR is a global report and is very effectively reaching audiences that work at a global level (e.g. in the development and international education communities). It is naive and unrealistic to seek detailed national level data and analysis to make the GMR serve as a national report. However, it is reasonable to expect the report to engage the right kind of audiences at national levels – those organisations and persons that influence and drive the education dialogue – and to offer them analysis and ideas that they can use in their national contexts. This is an important route in the TOC involving a range of national actors between the product and policy-influence. The scale of the task to develop GMR’s understanding of such audiences would require strategic thinking, prioritising and forging new partnerships.

202. In the global South, in particular, such engagement with the GMR by those national organisations that influence and drive the education dialogue is extremely varied and overall too limited. The GMR is rarely introduced and mediated into national level dialogue effectively or systematically so as to carry ideas forward into national discourse. The constraints are less about content (although the size of the document and the language policies contribute in some cases) but more organisational and logistical in the means to engage with these actors.

Lesson learned: New and more varied ways of engaging nationally are needed, to mediate the report and other knowledge products more systematically to the influencers at national level.

Distribution

203. The annual distribution plan is inadequate in that it considers only the sending out of the hard copy GMR and summaries. Whilst some efforts have been made to categorise recipients and some have been added for a specific purpose, many of the recipients on the distribution list are essentially there at their own request and not identifiable as targets for whom a hard copy report may be the most useful. There is no link between the physical distribution of hard copies and the dissemination of other GMR outputs, such as the soft copy of the report, policy papers etc. to maximise reach in all regions and to key identified stakeholders.

Lesson learned: Distribution of hard copies of the GMR and summaries, and the promotion and dissemination of soft copies, are integral parts of outreach planning: as such they should be considered in the same strategic context as communications and advocacy support, with the same attention to targeting different audiences.

204. Distribution via UNESCO field offices has major shortcomings. Where there is no UNESCO field office there is no volume of GMR copies circulating at national level and no exposure to the GMR (e.g. in Central Asia, where there is very low take-up of GMR products, compounded by the decision to stop the Russian language edition). Where there is a UNESCO field or regional office there is rarely a plan or capacity for strategic local/regional dissemination and use, yet UNESCO’s role has prevented GMR from working with other partners to get more effective reach.

Lesson learned: In the future an expanded range of options – partnerships and distribution / dissemination channels at regional and national levels – could ensure better reach of a global monitoring report and other outputs.

Launches

205. As a flagship UNESCO publication and following established UNESCO practice, the GMR has built its approach to outreach around a ‘big splash’ official launch, which, with the recent emphasis on communications, has increasingly driven other aspects of the preparation of the report (e.g. the research and production schedule, the embargo on external review of drafts and communication of messages, and occasionally the date of EFA steering committee meetings convened by UNESCO).

206. Although the official international launch of the GMR is an expensive call on the GMR resources, it has achieved a significant impact in the last three years through press and media attention, with subsequent high-level reactions and public debate. This has been the result of some strategically developed advocacy approaches each year. Beyond this, the value of the international launch – in terms of GMR reach and direct or indirect policy influence – is hard to establish. With very little evidence about, for example, how influential all those persons were who attended the international launch, or how the GMR subsequently influenced their decision-making, it remains open to question whether the official launch is the best use of staff time and funds. We recognise that holding an official and international launch event is how the report has operated from the outset, but we suggest that this is not necessarily a reason to continue with the practice in a changed, post-2015 environment; harder evidence of real value for money in terms of outcomes (influence on policy-makers) may be needed to justify the costs.

207. There is also a mismatch between the ‘big splash’ of the international launch, with key messages widely reported in the press in the global North and South, and the actual availability of the report in some places and in languages other than English. This creates some frustration and undermines the global impact of the international launch.

208. Subsequent national launches, initiated and organised by UNESCO field offices, are very varied and spread out over the course of the following year, so that calling the event a ‘launch’, when the report has been publicly available for months, seems increasingly inappropriate. At national launches the GMR contributes funds, provides guidance and requests reports, but despite these efforts the quality and reach of launches are heavily dependent on the capacities, interests and agendas of the specific field office. There is little structured follow-up to these launches, except where they resonate with national events or needs that UNESCO or another partner can pick up. Nonetheless, because national distribution of the hard copy report by UNESCO offices is often ineffective, and relatively few people in the global South download the soft copy of the report, the national launch event often has value as the only way some people and organisations get copies and hear about the GMR.

209. Overall, as an outreach mechanism the effectiveness of these national launches is highly variable. They need to be planned and managed within a strategic outreach plan for the GMR, and effectively monitored and evaluated for impact.

Lesson learned: In their current structuring, organisation and format national launches are unable to fulfil the important role of national distribution and dissemination effectively, and the GMR team, UNESCO and other partners should consider other formats and means to promote a newly published report, and more effective ways to stimulate its take-up at national level.

Languages

210. Decisions on allocating resources to language editions of products are difficult. Dropping the Russian translation of the report due to severe financial constraints has prevented any possibility of mediating the report into Central Asia and areas of Eastern Europe. This is an important missed target. It was based on the self-fulfilling prophecy of low take-up (i.e. downloads of the GMR) in the region, where UNESCO has very few field offices to facilitate distribution of even the Russian language summary report.

Lesson learned: Language is an important factor in the accessibility and take-up of the GMR, and as such language considerations should be located in a strategic and longer-term approach to outreach.

Impact

211. When the GMR is known and accessed, it can play an important role in influencing policy through direct contributions of analysis, concepts and recommendations, contributing to and

strengthening advocacy and providing a more background informing of stakeholders’ understanding of the context and framing of the education sector. These routes to influence are built on the GMR’s reputation for coverage, quality and credibility in both EFA monitoring and thematic work.

212. The utilisation and impact of the GMR in the international arena is high: it has become a “must-have” reference amongst donors, development agencies and INGOs and has an influential presence in high-level international education policy discussions. It has a growing presence within the academic community as a global reference document that frames and opens up new research avenues. The GMR has also provided an annual heightened global attention on education issues that advocacy organisations value as an opening for their own plans at international and, to a lesser extent, national levels. Some of the thematic reports have seminal status concerning policy issues in their areas. This international impact is high up the TOC as these agencies are policy-influencing and can have direct influence in the dialogue with policy-makers at national level and the policy structures within development partnerships.

213. Where national stakeholders are aware of and access the GMR it has also contributed to both advocacy and policy decisions, sometimes decisively where timely alignment with national debates has occurred. This could be strengthened by more flexible and manageable product formats (i.e. slimmer or multiple volumes rather than a single sizeable report) that are more appropriate to the needs of national policy-makers and other stakeholders, not only in the education sector but also in others that influence education policy.

214. However, national level impact has been highly variable and is severely constrained by the limited reach and awareness of the GMR amongst national stakeholders under current GMR product and dissemination arrangements.

Lesson learned: GMR products are valuable policy-informing and policy-influencing materials when they reach the right hands in the right format. At the international level this has largely been achieved, but further work is needed to both broaden the cross-sectoral engagement with the GMR and get GMR products into national stakeholders’ hands.

Governance and finance

Governance and management

The current governance arrangements

215. The GMR was established without a clear governance structure, the overriding purpose being to create the conditions for editorial independence and operational flexibility. Twelve years later the GMR has demonstrated its independence, notably from influence by UNESCO and by its funding partners.

216. The current governance arrangements for the GMR are ambiguous (i.e. they are open to different interpretations by different stakeholders), and rely on individual managers doing the right thing and the personal relationships of mutual understanding and trust of the GMR Director, ADG UNESCO and Chair of the Advisory Board. Although operations on an annual basis have been well-managed and accounted for (no suggestion is made that any Director has acted against the mandate of the GMR), and UNESCO has satisfied all the UN principles of financial accountability associated with special accounts, there are real risks associated with such weak accountability mechanisms, such as:

- There is no effective mechanism for oversight of individual Director’s forward plans for operations and spending commitments; these are reported on and can only be challenged by donors or other stakeholders retrospectively. Though plans may be discussed with the Advisory Board, this is only a consultative body whose advice can be ignored. The

assumption is that the Director is always fully competent and willing to make the right decisions and set the right spending priorities. If this assumption fails there is significant financial risk, as well as possible risks to the reputation of the GMR itself.

- In the event of an irresolvable difference of opinion between the GMR Director and UNESCO (as the hosting body) the Director has no recourse to a properly mandated governance body that represents the other stakeholders (donors, other UN bodies etc). Once again, the Advisory Board may take a view, but has no legitimate governance powers.

217. In effect, the GMR has been managed, funded and accounted for more like an annual project, rolling over year on year, for which the lack of stronger governance has been no impediment. However, the GMR (and the post-2015 monitoring function) is more legitimately a multi-stakeholder programme of work with outcomes and benefits of strategic relevance, delivered through a series of inter-related 'projects' (e.g. producing the annual report), activities and products. Such programmes require a governance structure that establishes goals, direction, limitations and accountability frameworks and ensures that these are adhered to by the management team, and represents the views and interests of the stakeholders and partners. This will be an important element to ensure that a post-2015 education monitoring function is firmly rooted within the context and aims of the global development goals over the next fifteen years.

Lesson learned: The informal governance and accountability structures could perhaps be justified whilst the GMR has been managed like a series of short-term projects but it has too many risks and disadvantages for a strategic long-term programme of education monitoring for the global community.

Post-2015 governance

218. Post-2015 it is clear that independence of the monitoring function will remain important so as to ensure the products are robust and can be used to hold countries and agencies to account. However, if global monitoring is to operate at the heart of the new framework (possibly a UN-wide monitoring system) several characteristics are likely to require more accountable and resilient governance and oversight structures. For example, the increasing emphasis among bilateral and multilateral development funders on results-based management of funded programmes requires a governing body to oversee and monitor management performance against agreed results indicators. In this context, if no transparent and accountable governance mechanisms are in place, bilateral donors in particular would be unlikely to get approval for longer-term financial commitments.

219. The GMR team and UNESCO are understandably wary of making changes to the current arrangements or introducing levels of bureaucracy that might threaten both the delicate independence balance and the need for flexibility in management decision-making when faced with tight annual schedules. However, a relatively simple separation of advisory and governance functions, to create a steering committee representative of the funders and key stakeholders of the education monitoring function, could not only mitigate the risks of weak governance, but also bring significant benefits to a post-2015 monitoring entity. For example:

- The steering committee might take on the overall responsibility of resource mobilisation for the monitoring function, to ensure a wider range of funding partners, more representative of international and national stakeholders, thus freeing the Director to focus on the development and implementation of strategic plans;
- The steering committee could provide leadership in determining strategic priorities and be a powerful advocate for and robust defender of those priorities.

Post-2015 hosting and branding of the monitoring function

220. UNESCO has the UN mandate for education, has legitimacy and, with UIS, has responsibility for global educational statistics: there is no other organisation that has the same credentials as a host for the global monitoring function. UNESCO would also bring a strong branding for the monitoring function in much of the world, as it does now. There should be no impediments to UNESCO responding to a need for stronger governance arrangements.

Operational management

Strategic planning and management

221. ‘Strategic’ relates to the identification of long-term or overall aims and interests and the means of achieving them. Strategic planning is a management activity that is used to set priorities, focus effort and resources, strengthen operations, ensure that staff and other stakeholders are working toward common goals, and to establish agreement around intended outcomes or results. It is an ongoing process of planning and review to assess and adjust direction in response to a changing environment. UNESCO has a medium-term strategic planning horizon of eight years, and a programme planning horizon of four years.

222. As noted above, the governance arrangements have allowed and, arguably, encouraged short-term planning for the GMR, and its management as an annual ‘project’ without a locus for strategic planning. Whilst the GMR Director and team have thought and acted strategically – for instance, in promoting key GMR messages to support emerging international trends and concerns, or in positioning the GMR in key alliances with other partners – they have done so within the framework of an annual report production and dissemination cycle, and have most often been focused on maximising the impact of each year’s annual theme.

223. This has not been strategic planning in a coherent or consistent sense, nor has the Advisory Board facilitated an agreed longer-term (e.g. four year) strategic approach to the GMR’s function and purpose in which to frame annual plans and provide a basis for accountability and strategic developments such as partnership building.

Lesson learned: The GMR team has been effective at thinking strategically within each annual report cycle, but has not had the space and capacity within the tight production schedule to step back and plan for the longer-term.

Operational relationships

224. The GMR has established a good operational relationship with UIS, upon which it is dependent for validated and globally legitimised data. That such an important relationship is based on informal agreements, dependent on individual goodwill and mutual understanding, constitutes a risk to the GMR. Any changes in personnel in any of the organisations could jeopardise or change previously understood agreements and practice, since they are not documented. Any irresolvable differences of opinion would lack the basis of formal agreement upon which an arbitrator might make a judgement.

225. UIS will have a significant role post-2015 to support the education monitoring function, alongside other potential partners, and so the importance of this relationship and the basis on which it is managed, will continue and may increase in light of new indicators and their implications for data collection and analysis.

Consultation

226. The need for consultation with stakeholders has emerged at several points throughout this evaluation (as it did in the 2009 GMR evaluation) in relation to content, dissemination and tools to support of EFA advocacy. The multi-stakeholder Advisory Board has gone some way towards

fulfilling this need. Consultation is, of course, a default demand from stakeholders and incurs costs and risks. However, two issues merit attention:

- On content: the GMR team needs to improve on the current methods of early consultation on report content. The problem of soliciting meaningful contributions, especially from developing countries, has been intractable given the GMR's limited resources and country-level reach through UNESCO offices. It certainly lacks the capacity and time to mount a series of regional and national consultation meetings, such as are held by UNDP's *Human Development Report* or the World Bank's *World Development Report*. There may, however, be scope for collaborating with the UNESCO Regional Education Bureaux (or possibly other EFA-concerned partners with global reach, such as the GCE) on consultative meetings, or piggy-backing on other timely events held by the Bureaux.
- On appropriate tools to support advocacy: the GMR team needs to complement its expertise through consultation with those actively involved in complex policy advocacy, so that partners can help to inform useful product formats and dissemination channels and amplify and direct messages coming out of the report.

Lesson learned: The Advisory Board cannot be the only mechanism for all types of consultation in its current configuration. Specific channels and stakeholder groups might better serve defined purposes and mechanisms for effective consultation which needs to be built into management and planning.

Time

227. The GMR team works to a punishing schedule in which they manage a round of critical fixed period tasks, from commissioning to publishing and printing. The demands are enormous; the work is stressful and there are few easy periods. Within this environment, the team have made a strong case for operational independence and for minimising governance and managerial overheads. Time constraints have been cited as the limiting factor to wider consultation and partnerships, for example, and, indeed to any additional management and accountability structures.

Lesson learned: Within the current expectations for timely delivery of such a demanding product, it is difficult, perhaps impossible, for the GMR team to take time to review priorities or introduce any major (i.e. disruptive) changes. In the future, however, particularly in the context of new development and education frameworks and structures, it will be essential for them to find the space to do exactly that.

Finance

Stability in funding

228. The short-term funding modalities that characterise the GMR have contributed to uncertainty and conspired to constrain strategic, longer-term planning. Getting longer-term funding commitments from donors, particularly bilateral donors, is subject to a range of political and organisational factors that are quite outside the control or influence of either the GMR team or UNESCO. However, post-2015 arrangements are an opportunity to make the case for secure, medium-term commitments by the concerned agencies and to take account of the resource needs to meet new demands and expectations of global monitoring.

229. The GMR has begun to experience the new landscape of aid funding that requires tangible high-level results delivered with due regard to value for money both in operational efficiencies (which GMR has pursued effectively) and in the metrics of impact, which remain problematic.

Lesson learned: In the future the GMR will not be able to avoid obligations to operate with due regard to these value for money measures and requirements. Significant effort and time will be needed to build the appropriate results-based frameworks and internal monitoring procedures.

Stronger financing mechanism

230. The search for more stable funding may also be facilitated by strengthened governance structures and a funding mechanism allied to that structure such as a multi-donor trust fund (MDTF), rather than a UNESCO special account. These funds are a common financing mechanism within the UN family and exist in many different forms and for many different purposes, inviting contributions from all different types of organisation, including public, NGO and private foundations, as well as national governments. Appendix 5 to this report provides a more detailed analysis of their nature and use. The key features in this context are that:

- they provide a pooled fund mechanism;
- they are administered by the hosting organisation; but
- they are overseen by a governing body representative of donors and other key stakeholders and accountable to the mandating organisation (e.g. the UN General Assembly).

231. While the current UNESCO special account provides the first two of these, and is subject to the UN principles of financial accountability, it remains an internal UNESCO mechanism, used very frequently in UNESCO to manage its extra-budgetary project funding. As such it carries an association with UNESCO that might be perceived by some potential donors as too close; a more clearly separated financial mechanism, with transparent governance structures, may encourage a wider range of funders and longer-term commitments to financing the EMF.

6 Recommendations

6.1 Value

Recommendation 13: The editorial independence of the education monitoring function (EMF) must continue to be guaranteed and enshrined in any new structures and agreements.

Editorial independence, together with the continued high standards of accuracy and reliability, has been the hallmark of the GMR to date. This is made a recommendation here only to emphasise the need to protect such independence in any new hosting, governance and financing arrangements so as to ensure the continued credibility and value of the monitoring and policy support function. Editorial independence rests with the Director.

Editorial independence implies a level of operational independence to steer research, innovate and respond to needs.

Recommendation 2: The EMF should be underpinned by a strategic planning cycle so as to facilitate longer financing arrangements and provide for outcome level results-based management.

Partners and funders post-2015 will be likely to seek stronger strategic plans, which include outcome level results and value for money approaches that consider outcomes and impact as well as inputs.

Strategic planning, on a four year cycle (to match UNESCO's four year programming cycle) should therefore include:

- Identification and research into target audiences for the EMF outputs and their needs;
- Monitoring and performance assessment indicators;
- Outreach strategies;
- Research partnerships;
- Funding and resource planning;
- Content, format and product plans (on rolling two-year review).

Recommendation 314: Within this strategic exercise the principle should be to design the *content and format* of EMF products to meet specific audience needs, with an annual monitoring output as the only minimum requirement.

Given the uncertainty around the resources and demands that the new GDF will require, there seems to be no gain in specifying the content and format of the EMF outputs at this stage, nor in basing future options only on the formats adopted by the GMR (e.g. one single annual report including monitoring plus thematic analysis). Beyond a minimum annual monitoring output, and noting that the GMR's annual thematic analysis is highly valued and might sensibly be kept in some format, the EMF should be seen as incorporating a range of different monitoring and knowledge products. These should be planned to meet different audience needs and to support GDF partners' missions to disseminate and advocate for GDF.

Recommendation 4: Within this strategic exercise consideration should be given to optimising *dissemination* of appropriate EMF products to disaggregated target audiences, particularly those at national levels.

Dissemination should be viewed and planned on the basis of maximising the reach to target audiences involved in policy discourse. This will involve understanding the needs and most effective means through which to reach each of these audiences with appropriate products and using this as

the basis for decisions on dissemination and communication channels and partners. All such channels (hard copy distribution, social media, press, launches, advocacy partnerships) should be reviewed together as a set of complementary tools that are strategically targeted to cover relevant audiences.

Within the current set of dissemination tools, it is noted that UNESCO field offices lack coverage and capacity for both effective and reliable distribution and launches and, for the EMF, other partnerships for disseminating and mediating its products at national levels should be explored. The post-2015 GDF arrangements are an opportunity to work with other agencies as partners in the dissemination of EMF messages and products, most pertinently UNICEF, which has relevant interests and a wider geographical reach.

Recommendation 5: The GMR should undertake preparatory actions for post-2015 that strengthen representativeness and outreach, and position it better to take on the post-2015 EMF.

To this end it should, for example:

- Prepare a technical report on the new monitoring environment post-2015, methods, indicators, challenges etc.;
- Work with UNESCO Regional Education Bureaux and other potential partners to plan for regular regional consultation meetings that will contribute to early consultation on proposed content of the EMF annual outputs;
- Undertake analysis of target audiences for the EMF outputs, within the new GDF partnership arrangements, and ways to improve dissemination of appropriate EMF outputs to them;
- Establish and formalise links to research institutions particularly in the South as potential contributors and research partners;
- Identify outreach partners (including for dissemination) who can assist in developing the EMF's support to GDF advocacy as well as mechanisms for audience reach. These may include GDF partner agencies, beyond UNESCO, such as UNICEF, INGOs, regional organisations etc.; and
- Assess and update funding and resource requirements.

These essential positioning activities will underpin the development of a medium-term strategic plan for the EMF (see Recommendation 10 below).

Recommendation 6: To support the new EMF mission and mandate, a representative Advisory Board should continue with an explicitly technical and advisory role.

The Advisory Board should be drawn, as it is now, from the wide-ranging education policy, research and practitioner communities in the global North and South, and should seek to strengthen the regional and professional range of inputs to the EMF. It would be expected that education specialists from bilateral and multilateral development agencies would be included as members of the Advisory Board, though **not** representing their organisations as funders of the EMF (i.e. the concerns of the donors as donors should be addressed separately, see Recommendation 14 below).

Recommendation 7: To support the new EMF mission and mandate a small editorial group should be maintained.

A small editorial committee should be retained, analogous to the current GMR expert group. Its membership should be reviewed annually, to ensure the right mix and representativeness of subject expertise and geographical perspectives. It would be expected that the composition of this committee would change regularly. The editorial group would be convened by the Director, with advice from the Advisory Board. Representativeness of the editorial group should be a process indicator in a results-based management framework.

Recommendation 8: To support the new EMF mission and mandate a small group should be established to advise on dissemination and support to GDF advocacy.

A small dissemination and advocacy group should be established with membership renewed annually, taking account of different strategic priorities in audiences and themes. This group would advise the EMF team on dissemination channels to different audiences and the tools and derivative products that might best support those involved in GDF advocacy. It would also provide a means to establish or identify strategic partnerships to optimise the reach of EMF analysis and mediate EMF messages into a range of advocacy spaces, particularly at national level.

Recommendation 9: The annual outputs of the EMF should be published in all the UN official languages as a matter of course.

The EMF must have an established position in the global machinery for the GDF and therefore must produce its outputs in all six UN official languages as a minimum. Different decisions about publishing in other, non-UN official languages will be driven by the kinds of product planned, the targeted regions, countries and audiences, and the possible partners involved. However, the EMF team should budget for and be able to guarantee access to the annual outputs in all UN official languages with no exceptions.

The language of EMF outputs will be an important factor in accessibility and take-up of different products for different audiences; language policy and other considerations should be a key element in a strategic and longer-term approach to outreach and content development. The tradition of demand-led partnerships for translation into a wider range of languages has been successful for the GMR and may be expanded if the EMF has more operational relationships with other partners.

Recommendation 10: Whatever the eventual shape of the GDF and its implications for the EMF, the GMR team should set aside a preparatory period of 12 months to: a) adjust to the data and monitoring requirements of the new framework; b) research and develop a robust medium-term strategic plan for the EMF; and c) formalise partnerships e.g. for research and dissemination.

Time constraints have been the enemy of strategic review and planning for the GMR, with its intensive annual cycle of publication and scale of outputs. The previous recommendations (Recommendations 2 and 5 specifically) require the GMR to undertake preparatory work, planning and partnership building that are preconditions for developing an effective post-2015 EMF.

We therefore recommend a complete pause in education monitoring outputs (including any kind of GMR given that EFA will have been replaced within the GDF) for one calendar year (2015/2016), starting when the final work on the 2015 GMR and associated products is completed. This will give the team, Advisory Board, UNESCO and other stakeholders sufficient space for preparatory work and the development of a strategic plan, governance and financial structures that are fit-for-purpose in the new post-2015 landscape.

Planning for the allocation and prioritisation of tasks during this pause year should begin earlier in 2015, once the final shape of the GDF and the possible mandate of the EMF become clear.

6.2 Management, governance and finance

Recommendation 11: The management and administrative capacity in the GMR team will need to be expanded to undertake the EMF.

To meet the requirements of improved planning, partnership and accountability, the EMF team should include the following posts and capacities:

- A senior manager or executive officer, with the key responsibilities of managing the strategic planning and review cycle, budgeting and financial management, establishing and reviewing management procedures that will deliver demonstrable value for money, and monitoring

and evaluation of the EMF operations. This is a supportive post, possibly at Deputy Director level. It is intended in this recommendation that the Director would retain oversight of strategic planning and budgeting but that the new post would undertake the technical and managerial workload.

In addition the EMF team should be strengthened with:

- A post with the responsibility to research, establish and manage links with research organisations across all regions but especially in the South, and put in place research agreements with research organisations that meet identified capacity and quality criteria and with the potential to contribute research inputs to EMF reports and other outputs.
- Staff capacity to undertake or commission audience research, and manage partnerships and promotional arrangements with partner organisations to deliver effective dissemination and advocacy support, especially in countries or regions where UNESCO does not have a strong presence.

Recommendation 12: A service level agreement or memorandum of understanding (MOU) between the EMF and UIS should be drawn up as the formal basis for the relationship.

The agreement or MOU would be contiguous with the four year medium-term strategic plan and clarify roles and responsibilities for both UIS and the EMF team. It could also provide the basis for greater complementarity and more effective linkages with UIS data to respond to the new complexities that are likely to be introduced in GDF targets and indicators.

Recommendation 13: UNESCO should remain as the hosting agency for the EMF.

UNESCO has the mandate for education within the UN family and has hosted and administratively supported the GMR effectively. As host to UIS it facilitates cooperation and complementarity. Its strong brand and professional reputation, particularly in the global South, should continue to give advantage to the credibility of the new EMF.

Recommendation 14: A steering committee should be established, in collaboration with UNESCO and other GDF agencies, and endorsed by the UN Secretary General's office as appropriate, to provide the governance, accountability and oversight mechanism for the EMF.

This steering committee will be separate from the Advisory Board, and accountable to the GDF mandating agency (possibly the UN General Assembly). Representation on the committee should come from UNESCO, EMF donor organisations, GDF partner agencies and possibly UNESCO member states to be representative of the EMF's constituency. The committee should have no more than 15-20 members serving for a limited term, with a rotating chair. It should meet once a year, and have the power to convene sub-committees to undertake specific tasks (e.g. resource mobilisation).

The EMF team, as the implementing body, would be accountable to the Committee for approval of strategic plans, management and use of EMF funds according to agreed annual work plans and targets, and monitoring and reporting within agreed accountability frameworks and M&E procedures.

Recommendation 15: A multi-donor trust fund (MDTF) should be established for the EMF, which would retain the pooled funding principle and be open to a wide range of national and international funders.

Unless there is a higher-level financing mechanism for the monitoring functions of the GDF as a whole, an MDTF would be a more transparent and robust financing mechanism for the EMF, likely to encourage longer-term financing commitments from a wider range of donors. These might be expected to include GDF partners, other bilateral and multilateral development agencies, private sector foundations and UNESCO Member States. The MDTF could be set up by UNESCO (as the hosting agency) or another GDF partner from the UN system. UNESCO as hosting organisation could

provide administrative services (account management, financial accounting etc.) in much the same way as it administers its current GMR special account.

An MDTF automatically brings a route to an accountable governance structure (Recommendation 14), as it would require an independent and representative steering committee or governing board. Appendix 5 to this report provides details of a good comparator MDTF managed by the World Bank.

Appendix 1: Terms of Reference

1) Introduction

This document outlines the Terms of Reference for the third external evaluation of the Education for All Global Monitoring Report (GMR). The evaluation will take place between the end of 2013 and the first half of 2014. This is less than two years before the deadline of the Education for All (EFA) goals, progress towards which is monitored by the GMR.

The results of the evaluation are expected to provide an assessment of the value and influence of the Report's contribution to the education sector, notably in influencing policy dialogue in the context of the EFA architecture. The evaluation is also intended to provide forward looking recommendations about the continuation of such a Report beyond the 2015 deadline.

See Annex VI for background of the Education for All Global Monitoring Report and History of the previous evaluations of the Report.

2) Scope and purpose of this evaluation

A. The current evaluation should assess the value and influence of the GMR within the wider international endeavours working towards achieving the EFA goals and the MDGs. To achieve this, the evaluation should assess the quality of the GMR, and the effectiveness of its dissemination and outreach since its inception in 2002. A specific focus should be given to the most recent three Reports, and associated materials and activities, produced since the last external evaluation was undertaken (i.e. 2010, 2011 and 2012 Reports) to assess their quality and effectiveness.

B. Based on the recommendation of the GMR Advisory Board in 2013 regarding their support for the continuation of an independent report after 2015, the evaluation should also dedicate a significant amount of attention to identifying clear options for the design and modalities for a monitoring report after the 2015 Dakar deadline. As part of this forward looking exercise, the evaluation should also assess and consider Post-2015 governance and financing modalities of the Report, including its financial needs to ensure its sustainability in the future. A proposal framing the different options for a Report after 2015 should be included in the recommendations.

The main issues to be examined above in parts A & B have been grouped into three overarching questions. These are indicative, and the issues to be addressed under each group will be proposed by the evaluators during the inception phase.

1. What is the value of the GMR with respect to its contribution towards Education for All?

- a) Quality of the Report: to what extent is the Report providing a good quality, evidence-based assessment in monitoring progress towards EFA, and in analysing specific themes?
- b) Outreach: how effective is the GMR's communications and outreach in promoting the Report's messages to its intended audiences?
- c) Impact: In what ways has the GMR influenced policy dialogue at global, regional and national levels?

2. How effective are the governance and financing structures of the GMR to ensure the achievement of its intended aims?

3. What are the options for the design and scope of a Report monitoring progress in education after 2015?

- a) Aims and focus: What are the different scenarios in relation to its aims, focus and approach in order to maximize its value to new global frameworks?

b) Governance: What are the options for its governance and financing to achieve the intended aims?

3) Methodology

The experts selected for this assignment are expected to propose a comprehensive design and plan to undertake the evaluation, with a detailed methodology adopting both quantitative and qualitative approaches.

The exercise should include the collection and analysis of data and information available internationally (via questionnaires and interviews with stakeholders from UNESCO and other UN agencies, civil society, governments, donors, private foundations, research community and the media); and nationally (including via the selection of a country in each region to conduct more detailed interviews with national stakeholders).

Other information could be collected by surveys amongst those receiving copies of the GMR; adoption of bibliometrics and internet searches for the Report's use by organizations and researchers; and use of tools for monitoring media and other forms of outreach.

The GMR team will provide access to a contact and distribution list. It will also facilitate access to UNESCO staff from both Headquarters and field offices, and to Advisory Board members. Access and use of the GMR's media monitoring tool will be ensured.

4) Deliverables

The evaluation team will be required to deliver the following in English, which will be submitted for feedback from the GMR team and Advisory Board Working Group. The evaluation team will begin by preparing a comprehensive design for the evaluation during the inception phase which will inform the future stages of the work:

1. Inception Report containing the evaluation design and questions, assessment framework, detailed methodology work-plans and logistics, around 10 pages.
2. Draft report, around 20 pages.
3. Half day workshop for presenting the findings and recommendations
4. Final Report, around 50 pages (excluding annexes), to include but not necessarily be limited to the following elements
 - Executive Summary (2-4 pages)
 - Description of the objectives
 - Purpose of the evaluation
 - Methodology (including respective challenges and limitations)
 - Major findings (in terms of achievements and challenges)
 - Conclusions and lessons learned
 - Recommendations for a Report post-2015
 - Annexes (including list of key document reviewed and consulted, list of persons interviewed, data collection instruments, Terms of Reference)
5. Presentation to the Advisory board

5) Schedule

The assessment is expected to start in November 2013 with an initial planning and inception phase followed by consultation, interviews and assessments. Consolidated feedback from the GMR team and the Advisory Board Working Group will be provided at each step, either in meetings or via email. An indicative timetable is as follows:

Inception Report by	December 2013
Presentation of first findings	Early March 2013

Draft Evaluation Report by Late March 2013
Final Evaluation Report April 2014
Presentation to Adv. Board May 2014

6) Logistics

The evaluation team will commonly be responsible for their own logistics: office space, administrative and secretarial support, telecommunications, printing of documentation, etc. Suitable office space will be provided for the consultants when they are working from UNESCO premises. The evaluation team will also be responsible for disseminating all methodological tools such as surveys, while the GMR team will facilitate this process to the extent possible by providing contact information.

Appendix 2: Methodology

Evaluation Framework

An evaluation framework was developed by the team at the outset of the assignment. The framework, based around the main questions outlined in the TOR, provides questions and sub-questions to guide enquiry, setting out the associated indicators, data collection methods and data sources for each evaluation sub-question. The evaluation questions and sub-questions have been linked to testing the validity of the theory of change (TOC), its risks and assumptions.

Only the first two of the three main questions set out in the TOR are included in the framework (i.e. ‘What is the value of the GMR with respect to its contribution towards EFA?’ and ‘How effective are the governance and financing structures of the GMR to ensure the achievement of its intended aims?’). The third main question relating to post-2015 options is not an evaluative question but rather a consultative, forward-looking exercise (the second strand of work), driven by the lessons learned and recommendations arising from the first two questions. The framework incorporates the five elements – hosting, governance, finance, branding and structure – providing an indication of how this analysis will be drawn from the findings.

Please refer to the inception report⁵¹ to see the full evaluation framework. The evaluation framework was used for the development of all evaluation instruments and to guide reporting.

Desk review

Documentation

Documents for the review were provided by the GMR team, through E/C’s internal library, and through systematic web searches. The following document types were included:

- all GMR products with a particular focus on products from 2010-2013
- minutes of the GMR Advisory Board meetings and management reports to GMR donors
- past evaluations of the GMR
- documentation related to the mandate, procedures, financing and monitoring of the GMR, communication and outreach strategies, distribution lists, launch event reports
- major global, regional and national reports on EFA and education from other stakeholders (UNESCO, other UN agencies, regional bodies, bilateral and multi-lateral agencies, international NGOs) from 2010 to date
- reports and documentation on the post-2015 development agenda as they relate to the implications for independent monitoring

As a contextual basis, all the reports (2002-2014) were assessed to provide an overview of their themes and key features and compare the structure, content, data sources and continuity across reports. The team was allocated documentation depending on their areas of expertise, and analysis followed a systematic process, including templates for reporting on some document types, to ensure coverage of relevant evaluation indicators and triangulation across sources. A list of international references is presented in Appendix 4.

National consultants reviewed GMR materials, with specific focus on anything pertinent to their region, and, where available, reviewed information on GMR national launches, national education

⁵¹ E/C (2014), ‘External Evaluation of the Education For All Global Monitoring Report: Inception Report’

policies and strategies and leading education stakeholder reports. The primary function of this document review was for contextual reference and background knowledge, but some findings from the national document analysis also fed into internal case study reports.

Background papers analysis

Background papers for reports 2011-2014 were analysed by authors’ institution. The papers were accessed via the GMR website and titles and authors were manually collated. In some cases, the papers included the authors’ institutions, in other cases it was necessary to research the authors affiliated institution. The country in which the institution is based was added to the data and excel was used for analysis.

Media analysis

The GMR team provided web analytics data, including information on the website, downloads and social media (detailed in Table 6). The data was analysed against relevant evaluation indicators, with a focus on the question: *How effective is the GMR’s communications and outreach in promoting the Report’s messages to its intended audiences?* Each media type was assessed individually to detect trends over time and compare with other sources of information, particularly internal documents such as strategies and policies.

In addition, the evaluation team reviewed the content of the outreach media. An analysis of Twitter and Facebook was also conducted, including a comparison against other similar organisations (those included in the last benchmarking exercise, UN bodies, INGOs, multilateral and bilateral agencies with a strong education focus, and international campaign or campaigning organisations with an education focus), to assess:

- Number of followers on Twitter
- Twitter reach – average tweets per day, percentage and average number of Tweets retweeted
- Twitter global mapping
- Number of Facebook likes

Twitter reach comparison data was gathered using Twitonomy (www.twitonomy.com), and Twitter global mapping was generated using Followerwonk (www.followerwonk.com).

Table 6: Types of media and information provided by the GMR team

Media type	Information/disaggregation provided	Period covered
Website	Page views, incoming links, outgoing links	Nov 2008-Nov 2013 (monthly breakdown)
Reports downloads for 2008-2012 reports	Totals and by report, by language, by country	2008-2012 reports launch and following months; Jan 2012-Nov 2013 for 2011-2012 reports (monthly breakdown)
Summary downloads 2011-2012	Totals and by language	2011 report Jan –Dec 2012, 2012 report Oct 2012 to Nov 2013 (monthly breakdown)
Regional overviews for 2011 report	Total and by language	2011 report Jan 2012- Jun 2013 (monthly breakdown)
Policy Papers	Totals per paper and by languages	Jan 2012-Jan 2013 (monthly breakdown)
World Education Blog	Views, followers, breakdown by blog post	Jan 2010-Nov 2013 (monthly breakdown)
Twitter	Followers, retweets, mentions, mentions by influencers, impressions, top tweet (by replies, retweets, reach, clicks), influential new followers	Jan 2010-Nov 2013 (monthly breakdown)
Facebook	Likes (accumulated and monthly increase), people reached, most liked post	Likes: Mar 2010-November 2013 and reach July 2011-Nov 2013 (monthly breakdowns); most liked posts 2012 and 2013
Google +	+1'd or added to circles; have GMR in circles	Jan 2012-Jan 2013 (monthly breakdown)

LinkedIn	Members	Jan 2012-Nov 2013 (monthly breakdown)
YouTube	Number of views for top 3 videos viewed	Jan 2012- May 2013 (monthly breakdown)
Flickr	Accumulated views by photo album	Jan 2012-May 2013 (monthly breakdown)
Tumblr	Followers, submissions, views, growth	Jan 2012-Nov 2013 (monthly breakdown)
NewsAlert	Subscribers, bounces, opt-outs, opens, click-throughs to website, blog, twitter, facebook	Jan 2012-Nov 2013 (monthly breakdown)
WIDE	Unique visitors, new visitors	Sep 2012-Nov 2013 (monthly breakdown)
Media (meltwater hits)	Online articles, countries' media, media reach, blogs, AVE	Oct 2012-Nov 2013 (monthly breakdown)

Distribution list analysis

The GMR team provided the evaluation team with a copy of GMR distribution orders for the 2013/14 report. The distribution list included internal distribution (UNESCO delegations), events and miscellaneous orders and standing order shipments through the contracted distributor. An analysis was conducted of the standing order information; data was organised and analysed according to numbers distributed, organisation types and country locations of recipients. The data was subsequently filtered to remove field office data to provide a better understanding of the reach of the shipments. Analysis was conducted using excel.

Launch analysis

All launches and events listed on the GMR website⁵² (limited to those from 2009-2014) were manually entered into excel spreadsheets and analysed according to location and type of event (launch, presentation etc).

Bibliometric analysis

The Scopus database was used to search for citations to all GMR reports (2002-2012) and each set of GMR background papers using the 'reference search' function. Multiple versions and parts of each report title and background paper were searched separately to cover the multiple ways in which these documents may have been cited. Scopus's 'secondary documents' function was then used to give search results of cited document titles⁵³ which were downloaded into excel formats. All results were then manually checked by two members of the team to eliminate non-GMR titles, with ambiguous titles individually followed-up to clarify whether it related to the GMR or an unrelated document.

The resulting lists of cited titles were then organised by report (using both title and given date to ensure allocation to the correct report) and by background papers. These were then re-entered into Scopus as a further check and to gather any additional variations of cited GMR titles which were reviewed and added to the final 'title' lists to provide total numbers of citations of each GMR and background paper. Full citation information of the citing articles under each GMR and each annual set of background papers was then downloaded. The resulting number of citing articles for each was checked against the number of citations in the 'title' lists, noting new or missing citations which were followed up individually to check their relevance.

Initial searches on GoogleScholar through the software Publish or Perish, and on the Web of Science were then undertaken for a sample of GMRs to check the coverage of citations gathered through Scopus. These indicated greater coverage by Scopus.

⁵² <http://www.unesco.org/new/en/education/themes/leading-the-international-agenda/efareport/events/>

⁵³ Initial results provide relevant articles listed within the database. The 'secondary document' function shows cited documents that are not listed articles within the database i.e. organisational reports and papers such as the GMR's.

Each citing article was then allocated a specific code in relation to the GMR or background paper which it cited in order to ease analysis. Different items of the citing information were then examined:

- Total number of citations both by GMR product and by year, noting the different patterns over time and per report;
- Country locations of citing authors was extracted from excel, and consolidated by both GMR product and year
- Journals in which citing articles appeared were extracted and their subject area and specific field classification under Scopus identified. The results were then sorted by GMR and by year and a network analysis undertaken (using NodeXL) to show spread and concentrations of citations across disciplinary fields.
- The ranking of each of these journals within their field in the year in which the citing article was published was then identified using the SCImago Journal Ranking indicator.⁵⁴ Results were sorted both by year and by disciplinary field and analysed for trends.
- Title and abstract text of citing articles for each GMR was entered into 'Wordle' to identify recurring themes and key words, and analysed against the themes of each GMR
- Abstract text was entered into CiteSpace software to undertake cluster analysis of key words and phrases

In order to explore the nature of the citations of the GMR, a random selection of citing articles of the 2010 GMR was made, amounting to 10% of the total citation of that report. The 2010 GMR was selected for this due to the time lag in academic publication which means much fewer academic articles citing the 2011 and 2012 GMRs are available, as well as the fact that the 2010 GMR has received a very high numbers of citations. These sample articles were downloaded and each was examined using an excel template against a number of criteria: the theme of the article, what it is citing from the GMR (data, EFA progress analysis, thematic analysis, education financing analysis), how often the GMR is referenced, where the GMR is referenced within the article, and why it is referenced (e.g. to frame an issue or argument, to provide data etc.).

In addition, documents and reports from a sample of INGOs (Plan, ActionAid, Oxfam, Save the Children), multilaterals (GCE) and donors (DFID, USAID, SIDA) were analysed for numbers and types of references to the GMR. These documents were sourced from these organisations' online publications lists, selecting all documents since 2010 related to education or the broader themes of the GMR since 2002. Each document was examined using an excel template against a number of criteria: type of document, whether and number of times it references the GMR, what elements of the GMR are drawn upon and why.

Engagement with stakeholders: global and regional

Interviews

Interviews, using semi-structured interview templates, were conducted by telephone and face-to-face. Respondents were selected from the GMR contact list, ensuring coverage of a wide range of organisations and types of stakeholders. Team members sent personalised invitations to potential interviewees, including information on the purpose of the evaluation and the areas of questioning, and followed up with reminders to maximise responses. In total, 63 education stakeholders at international and regional levels were interviewed for the evaluation.

⁵⁴ <http://www.scimagojr.com/SCImagoJournalRank.pdf>

Interview guides were developed from the evaluation framework, and adapted according to the stakeholder taxonomy (see Table 7). Three guides were used by the team:

- Development and donor agencies (A2, A3 and A5) and international NGOs, networks and foundations (B1 and B2): chief education specialist, education policy adviser (if different), advocacy/communications and research personnel
- International think tanks and research organisations (C1 and C2): policy-making and/or research personnel
- GMR donor agencies and other members of the advisory board (A4): link person with GMR, policy-making, advocacy/communications and research personnel

Interviews were conducted by core team members, who were allocated interviewees according to their role and areas of expertise. Interviewers recorded detailed notes on a standardised reporting framework. Responses were then collated across respondents and analysed by evaluation questions according to the taxonomy.

Table 7: Taxonomy of GMR stakeholder groups at international level

Agencies and institutions	Responsibility/role of the individual(s) to be interviewed
A. Development and donor agencies (multilateral and bilateral)	
A1 UNESCO ED sector and others in UNESCO (e.g. Division of Public Information (DPI)/External Relations and Public Information Sector (ERI))	ADG, EO, Division directors and staff
A2 EFA convening agencies other than UNESCO (UNICEF, UNDP, UNFPA and World Bank)	Institutional policy-making (education specialist); Education policy advisers (if different from above); Advocacy/communications; Research
A3 Other multilateral (UN Women, WHO, UNHCR, UNSG (for Global Education First Initiative), Commonwealth Secretariat, European Commission)	Institutional policy-making (education specialist); Education policy adviser (if different from above); Advocacy/communications; Research
A4 GMR donor agencies (funders between 2010-to date) (Australia, Denmark, Finland, France, Germany, Ireland, Netherlands, Norway, Sweden, Switzerland, UK)	Link person with GMR; Institutional policy-making (education specialist); Education policy adviser (if different from above); Advocacy/communications; Research
A5 Other bilateral agencies (USAID, Canada....)	Institutional policy-making (education specialist); Education policy adviser (if different from above); Advocacy/communications; Research
B International NGOs, networks and Foundations	
B1 NGOs and civil society networks (e.g. Save the Children, ActionAid, Oxfam, Plan International, Education International)	Institutional policy-making (education specialist); Education policy adviser (if different from above); Advocacy/communications; Research
B2 International foundations and private sector corporations (e.g. OSF, Mastercard, Bill and Melinda Gates)	Institutional policy-making (education specialist); Education policy adviser (if different from above); Advocacy/communications; Research
C International think tanks and research organisations	
C1 UNESCO institutions (IBE, IIEP, UIL)	Institutional policy-making (education specialist); Education policy adviser (if different from above); Research
C2 Other think tanks/research institutions: e.g. OECD DAC, Brookings Institution, Chatham House, Friedrich Ebert Foundation, ODI	Institutional policy-making (education specialist); Education policy adviser (if different from above); Research

The list of interviewees is appended as Appendix 3.

Wider survey

Two online surveys were conducted, one for UNESCO field offices and one for education stakeholders (wider survey).

Invitations to complete the wider survey were sent to 3734 individuals from a wide range of respondents, using the GMR distribution list as a starting point. The survey was also promoted through a number of online forums and networks.⁵⁵

The survey was hosted online by SurveyMonkey. It was developed in English from the evaluation framework indicators. The survey was translated into French, Spanish, Arabic, Russian and Chinese by a professional translation company and final online versions were proof-checked. The survey was subject to rigorous internal testing before being piloted with a small group of associates.

The survey was open for eight weeks and reminders were sent to maximise responses. 506 respondents started the survey from 123 countries and responding in English (411), French (40), Spanish (32), Arabic (17) and Russian (6). Once the survey was closed, responses were downloaded and merged in SPSS. Data was checked and cleaned. Frequency tables were run for initial analysis, before cross-tabulation was conducted by country (question 6), organisation type (question 1), level at which they work (question 5) and whether education was the primary focus of the organisation (question 2). Due to the large number of options on question 6 and question 1, the questions were recoded into categories to aid analysis: for question 1, countries were recoded into the eight GMR regions; for question 6, recoding was as conducted as outlined in Table 8.

Table 8: Recoding of response options to question 1: ‘what type of organisation do you work for?’ and number of responses

Response option on question 1	Number	Recoded categories	Number
International non-governmental organisation (INGO)	104	International non-governmental organisation (INGO), networks and foundations	125
International/regional civil society coalition	4		
Private foundation/institute	17		
UNESCO	12	Development and donor agencies	57
Other United Nations agency	31		
Other multilateral agency	3		
Bilateral agency	9		
Regional political organisation (e.g. European Union, Africa Union)	2		
Academic/research institute or university	95	Academic/research institute or university	95
National non-governmental organisation (NGO)	43	National non-governmental organisation or coalition	88
National civil society coalition	9		
Teachers’ union	36	National government agency or department	67
National government agency or department	67		
Consultant (organisation or individual)	63	Consultant (organisation or individual)	63

Findings were analysed according to evaluation framework criteria for triangulation with other sources. The survey included question logic to avoid asking irrelevant questions and maximise completion rates; for example, many respondents were redirected to a final two questions if they responded negatively to question 7, “Are you aware of the Education for All Global Monitoring Report (GMR) or any of its related materials?” Responses were therefore filtered according to the survey logic. In each question, responses which were assumed to have dropped out of the survey – that is, they did not complete any further questions – were allocated a different code to those who skipped the question – that is, they did complete subsequent questions that they were asked. In presenting the results, percentages are calculated based on total number of respondents that were

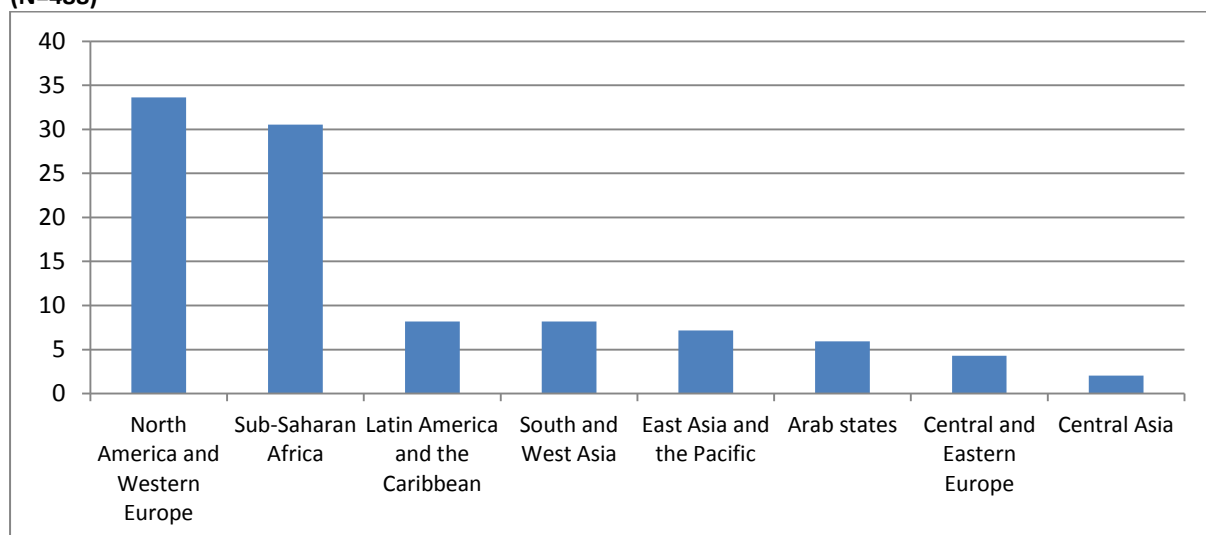
⁵⁵ Pelican listserv, GCE Netherlands Newsletter, ANCEFA network members, LinkedIn ADB Consultants Network, LinkedIn Education in Developing Countries Group, LinkedIn Education Management Professionals Group, LinkedIn Technical Assistance Consultancy Network; EU, Worldbank, Calls, Grants, International Development, GADN Education Group, Forum for consultants in international development - FB group, GMR NewsAlert, EfC’s website, Twitter and Facebook page

asked the question (according to the survey logic) and had not dropped out, therefore including those that have skipped the question.

As shown in Table 8, the highest number of responses was from international NGOs, followed by academic/research institutes or universities, with a good representation of national governments and national NGOs, coalitions and teacher unions.

The highest number of responses were from the United Kingdom (59) followed by the United States (31), Kenya (21), France (16) and India (13). Over half the countries had responses from only 1 or 2 people, suggesting a wide but low level coverage. When recoded and analysed by region, however, it transpires that the majority of responses were from North America and Western Europe (164 responses) and Sub-Saharan Africa (149) – see Figure 27. Particularly under represented is Central Asia, with only 10 respondents, and Central and Eastern Europe, with 21 responses. In many cases it has been necessary to leave these two groups out of cross-tabulation analysis with other questions, where their response rate is under 10 for that question.

Figure 27: Distribution of survey respondents, according to the country they are based by region, % of total (N=488)



The majority of respondents (425 respondents, 84%) stated that education was the primary focus of their organisation. Areas in which the organisation worked were also most likely to be education related: the most popular were primary education (77%), secondary education (66%) and early childhood education (60%). Respondents were least likely to be involved in agriculture and nutrition (18%) and environmental sustainability (22%).

UNESCO field office survey

The UNESCO Field Office survey invitation and two reminders were sent by the GMR team to all Field Offices. It was available in English, French and Spanish and was open for just over four weeks.

This survey was also online and hosted by SurveyMonkey. It was developed from the evaluation framework, including some questions that were the same as the wider survey and enquiring into similar areas as the case studies. There was more space for free text responses and comments than the wider survey.

In total, 23 valid responses from 17 country offices were received: Afghanistan, Brazil, Chile (3), Cuba (2), Ghana, Lebanon, Namibia, Nepal, Nigeria, Pakistan, Russia, Samoa, Senegal (2), Switzerland (2), Tanzania, Thailand and the USA. Most of the responses were submitted in English (20), with one in French and two in Spanish. 19 of the respondents were education programme specialists. One respondent had never heard of the GMR.

The survey results were merged and analysed in SPSS and excel. Cross-tabulation of all questions by country office were run, but due to the low number of responses and the importance of confidentiality (it would be very easy to determine the individual by their country office), these are not presented in our results. Analysis of numeric data was conducted alongside analysis of free text responses to maximise depth of understanding. All analysis was according to the relevant indicators on the evaluation framework, and the data was directly compared to the findings of the wider survey and triangulated with other sources.

Country case studies

Case study work was undertaken by consultants in the following countries: Brazil, India, Kenya, Lebanon, Russia, Senegal, UK (focus on England but with reference to Wales, Scotland and Northern Ireland) and Viet Nam. The countries selected represent a range of regions, languages, income levels educational enrolment rates and UNESCO office types, as well as including E9 members and countries with federal structures.

Consultants for the country case studies were recruited through EFC's extensive network and recommendations from UNESCO offices. All consultants met the following minimum criteria:

- High level of knowledge of the education sector in the case study country and the main actors within it
- Good awareness of international education priorities
- Strong track record of research
- Strong track record of consultancy work, including experience with UNESCO and other UN bodies
- Extensive experience of working at national level
- Fluent in national language and English, strong report writing skills in English

Three of the case studies (Kenya, India and the UK) were carried out by core team members.

A research toolkit was developed, including a typology of stakeholders to be reached at national level (see Table 9) and interview guides for each stakeholder type. These tools were piloted by John Wood, Team Leader, and Alfred Ojwang, Education and Development Partner Specialist, in Kenya. Based on the findings from Kenya, minor revisions were made to the interview guides. A training pack was put together for national consultants, including:

- Country case study guideline
- Stakeholder typologies list
- Interview questions and introduction text
- Email template to send to stakeholders
- Response recording template
- Reporting template

The email template, interview questions and introduction text were professionally translated into French, Portuguese, Russian and Vietnamese and checked by the respective consultant. Each national consultant was trained online via Skype, led by Alfred Ojwang and Sophie Tanner.

The UNESCO office or NatCom was contacted in advance to request assistance in the evaluation. The consultant worked with the UNESCO office or NatCom to identify consultants according to the typology in Table 9, and provided support in making contact and setting up appointments. Consultants were able to interview 147 respondents in total across the countries, with strong representation of all stakeholder types.

Interviews were semi-structured, and interviews followed the appropriate interview guide for the stakeholder. Consultants took detailed notes on a standardised recording template, and conducted an analysis of their findings by evaluation indicator and according to stakeholder type. A reporting template was developed and consultants submitted a draft country report to the core team. The findings from the countries were collated and analysed by the core team.

Table 9: Taxonomy of GMR stakeholder groups at national level

Agencies and institutions	Responsibility/role of the individual(s) to be interviewed
D. Development agencies and international NGOs in country	
D1 UNESCO FO/RO and NatCom	Education specialist/or as designated by Director NatCom education representative
D2 National or regional offices of multilateral agencies (e.g. UNICEF, UNDP)	National policy-making and planning in education Advocacy/communications
D3 National or regional offices of international NGOs (e.g. Plan International, Save the Children)	National policy-making and planning in education Advocacy/communications Research
D4 National or regional offices of bilateral donor agencies (or embassies) (e.g. DFID, USAID)	National policy-making and planning in education Advocacy/communication
E National NGOs, civil society and research organisations	
E1 NGOs and civil society organisations/networks in education or child-related fields	Education specialists Advocacy/communication
E2 National/regional think tanks, foundations and academic research institutions involved in education	Education specialists Research
F National government and education sector institutions	
F1 Ministry of education (including higher education) and other relevant ministries (as recommended by UNESCO FO)	Policy-makers (ministerial advisers, senior officials, policy teams etc.) Planning department
F2 Other important national education sector bodies (e.g. Teacher management commissions, teaching unions or professional associations)	Advocacy/communications

Delphi survey

Two rounds of a Delphi survey were carried out. The purpose of a Delphi is to test emerging conclusions and recommendations, generating responses to iterate towards more detailed conclusions. This Delphi survey focused on gathering opinions and refining the options for the GMR after 2015, based on the analysis of early findings and lessons learned from the evaluation through the lens of the emerging scenarios for the post-2015 education landscape. The Delphi surveys included questions of multiple choice, Likert scales of agreement or importance and open ended questions. Respondents were encouraged to comment on the questions and their responses.

Senior international education stakeholders were identified through the international interviewees; respondents selected covered a range of stakeholder types and regions, and had shown particular insight, understanding or interest in the GMR during interviews. 29 respondents were contacted to take part of which 15 responded in the first round and 13 in the second round.

Individual responses were reviewed by the core team and taken into consideration in the finalisation of conclusions and recommendations.

Reporting

The final version of the inception report was submitted on 29th January 2014, following a round of comments. The inception report outlined the evaluation approach and the methodology.

Emerging findings were submitted in note form for comment by the GMR team on 17th April 2014, and subsequent comments were received. These comments were taken into consideration during the drafting of the final report.

The final report is synthesised against the main evaluation framework questions and indicators to provide the basis for analysis with data triangulated from multiple sources where possible. The draft report provided the basis for discussion for a conference phone call with the interim GMR Director, GMR Team Manager, the last and upcoming GMR Directors, and two Advisory Board Members, and feedback from this, plus detailed comments by the GMR team on the draft, informed the final report, which was submitted on 9th June 2014.

Appendix 3: People consulted

International

Organization	Last Name	First Name	Job Title	Country
ActionAid	Archer	David	Head of Programme Development	UK
African Union Commission	Njega	Beatrica	Director of Education Division	Ethiopia
ANCEFA, Africa Region	Sow	Gorgui	Vice President	Senegal
Arabic Campaign for EFA	Refaat	Sabbah	Coordinator	Palestine
Asian Development Bank	Jagannathan	Shanti	Senior Education Specialist	Philippines
Cambridge University	Rose	Pauline	Former Director, GMR	UK
Cambridge University	Colclough	Christopher	Former Director, GMR	UK
Commonwealth Secretariat	Greaves	Pauline	Head of Education	UK
Danish NGO Education Network	Gudmandsen	Helle	Director of EFA Campaign	Denmark
Education International	Edwards	David	Deputy General Secretary	US
Federal Ministry for Economic Cooperation and Development, BMZ	Grigoleit-Dagyab	Norzin	Education Division	Germany
FHI 360	Omoeva	Carina	Director, Education policy and Data Center	US
GIZ	Ziai	Atussa	Advisor	Germany
Global Campaign for Education	Walker	Jo	Policy Manager	UK
Global Campaign for Education	Croso	Camilla	President	Brazil
Global Monitoring Report	Antoninis	Manos	Acting Director	France
Global Monitoring Report	Zubairi	Asma	Research team	France
Global Monitoring Report	Jeere	Kate	Research team	France
Global Monitoring Report	Delprato	Marcos	Research team	France
Global Monitoring Report	Härmä	Joanna	Research team	France
Global Monitoring Report	Redman	Kate	Communications	France
Global Monitoring Report	Subden	Emily	Social media	France
Global Partnership for Education	Beardmore	Sarah	Advocacy Officer	US
Global Partnership for Education	Bernard	Jean-Marc	Senior Education Specialist	US
Idara-e-Taleem-o-Aagahi	Jamil	Baela	Chairperson	Pakistan
International Institute for Educational Planning	Grant-Lewis	Suzanne	Director a.i.	France
International Bureau of Education	Acedo	Clementina	Director	Switzerland
International Labour Organisation	Liang	Oliver	Education sector specialist	Switzerland
International Network for Education in Emergencies (INEE)	Henninger	Lori	Director	US
Irish Aid	Nolan	Paula	Development Specialist	Ireland
Ministry for Foreign Affairs of Finland	Karakossi	Jussi	Senior Education Adviser	Finland
Network for international policies and cooperation in education and training (NORRAG)	King	Kenneth	Founder	UK
Norway Agency for Development Cooperation (NORAD)	Nilson	Bente	Senior Adviser	Norway
Organisation for Economic	Ward	Michael	Directorate for Education	France

Organization	Last Name	First Name	Job Title	Country
Cooperation and Development (OECD)				
Overseas Development Institute	Nicolai	Susan	Head of Project - Development Progress	UK
Oxfam	Fuentes	Ricardo	Head of research	UK
Plan International	Davies	Anthony	Policy Officer	UK
Save the Children	Bermingham	Desmond	Director, Education Global Initiative	UK
Swedish International Development Cooperation Agency (SIDA)	Arvidsson Hyving	Stellan	Policy Specialist	Sweden
Swiss Agency for Development and Cooperation (SDC), West Africa Division	Liechti	Valérie	Education Policy Adviser - SDC Education Focal Point Federal Department of Foreign Affairs FDFA	Switzerland
The MasterCard Foundation	Kerr	Kimberley	Consultant, Youth Learning	Canada
UNESCO Institute for Lifelong Learning	Carlsen	Arne	Director	Germany
UK Department for International Development	Hennell	Sarah	Education Policy Team	UK
UK Department for International Development	Whitby	Robert	Deputy Head, Education Policy Team	UK
Understanding Children's Work	Rosati	Furio	Program Coordinator	Italy
UNESCO	Tang	Qian	Assistant Director-General for Education	France
UNESCO	Ostveit	Svein	Director, Executive Office	France
UNESCO	Choi	Soo	Director, Education for Peace and Sustainable Development Division ED	France
UNESCO	Atchoarena	David	Director, Division for Teacher Development and Higher Education ED	France
UNESCO	Ruprecht	Lydia	ED Knowledge management services (KMS)	France
UNESCO	Williams	Sue	DPI Head of Press and Media	France
UNESCO	Lee	Jeff	DPI Social media expert	France
UNESCO	Qian	Tang	Assistant Director General, Education	France
UNESCO	Sachs-Israel	Margarete	EFA Global Partnership Team	France
UNESCO	Detzel	Sabine	EFA Global Partnership Team	France
UNESCO	Fordham	Elizabeth	EFA Global Partnership Team	France
UNESCO Institute of Statistics	van der Pol	Hendrik	Director	Canada
UNESCO Institute of Statistics	Motivans	Albert	Head of Education Statistics	Canada
UNHCR DIP Pillar II	Gomez	Sonia	Education Specialist	Switzerland
UNICEF	Naidoo	Jordan	Senior Advisor	US
UNICEF	Saijjee	Aarti	Senior Education Advisor, Head of UNGEI Secretariat	US
United Nations Development Programme	Jahan	Selim	Director of Poverty Practice	US
University of Chile	Ávalos-Bevan	Beatrice	Professor	Chile
World Bank	King	Elizabeth	Director, Education Sector, Human Development Network	US
World Vision	Philips	Alisa	Education Sector Specialist	US

Case studies

Brazil

Organization	Last Name	First Name	Job Title
CNE	Cordão	Francisco	Conselheiro
Federal Parliament of Brazil	Bruno	Artur	Member of Parliament.
Government of São Paulo (SEADE)	de Castro	Maria Helena	Director
Ministry of Education (INEP)	Soares	Francisco	President
Ministry of Education (SEB)	Coelho	Rita	Coordinator of Children Education
Ministry of Education (SEB)	Dutra	Italo	Coordinator of Primary Education
Ministry of Education (SEB)	Fialho	Leandro	Coordinator of Integral Education
Ministry of Education (SECADE)	da Silva	Mauro José	Coordinator of literacy of adult and young education.
Municipality of Rio de Janeiro	Costin	Claudia	Secretary of Education
Municipality of São Paulo	Alvez	Ataide	Chef of cabinet.
National Council of Education (CNE)	de Lima	José Fernandes	President
State University of Rio de Janeiro (UERJ)	Ramos	Aura	Researcher of curriculum departament
UERJ		Alice	Researcher of curriculum departament
UNESCO	Otero	Rebeca	Coordinator of Education Area

India

Organization	Last Name	First Name	Job Title
Amam/RTE forum	Raghu	Tewari	State Convenor for Uttara
Central Institute of Education, University of Delhi	Poonam	Batra	Professor of Education
ILO DWT for South Asia and Country Office for India	Panudda	Boonpala	Deputy Director
Independent	Uddalak	Dattaa	Consultant based in Delhi
Ministry of Human Resource Development	Amarjit	Singh	Additional Secretary, Department of School, Education & Literacy
Ministry of Human Resource Development	Jaipal	Singh	Director, Indian National Commission for UNESCO
Ministry of Human Resource Development	Surparna	S. Pachouri	Director, Elementary Education Bureau-1
National Coalition for Education (NCE)	Rama	Kant Rai	National Secretariat
National Council of Educational Research and Training	Kavita	Sharma	Assistant Professor, Department of Elementary Education
RTE forum	Ambarish	Rai	National Convenor
RTE forum	Anil	Pradhan	State Convenor for Orissa
School of Social Sciences, Jawaharlal Nehru University	Ajay	Kumar	Associate Professor
UNESCO New Delhi Cluster Office for Bangladesh, Bhutan, India, Nepal, Maldives and Sri Lanka	Alisher	Umarov	Chief of Education and Programme Specialist

UNESCO New Delhi Cluster Office	Huma	Masood	Programme Officer (Gender & Education)
UNESCO New Delhi Cluster Office	Rekha	Beri	Document and Public Information Officer
UNESCO New Delhi Cluster Office	Shailendra	Sigdel	Statistical Cluster Advisor (UIS)
UNICEF India Country Office	Natalia	Mufel	Education Specialist
United Nations Population Fund	Frederika	Meijer	UNFPA Representative
United Nations Population Fund	Geeta	Narayan	Programme officer, Adolescent Reproductive and Sexual Health
World Bank	Shabhan	Sinha	Senior Education and Institutional Development Specialist
World Bank	Toby	Linden	Lead Education Specialist
Young Lives India (formally Save the Children)	Renu	Singh	Country Director

Kenya

Organization	Last Name	First Name	Job Title
ANCEFA	Waruku	Boaz	Regional Project Coordinator
DFID	Chemei	Sophia	Senior Program Officer - Education
East African Regional Resource Centre (EARC) African Development Bank	Charo	Ruth	Principal Social Development Specialist
Elimu Yetu Coalition	Ouko	Jane Muthoni	National Coordinator
Girl Child Network	Mbuvi	David	Programme Officer
Kenya Institute for Curriculum Development	Nzomo	Lydia	Director
Kenya National Commission for UNESCO	Njoka	Evangeline	Secretary General
Kenya National Examination Council	Ogle	Mukhtar	Principal Examinations Secretary
Ministry of Education Science and Technology	Murage	Margaret	Deputy Director Policy, Partnerships and East African Community
Society for International Development	Prato	Stefano	Managing Director
Society for International Development – Regional Office for East and Southern Africa	Muyonga	Mary	Programme Officer
Society for International Development, Regional Office for Eastern Africa	Ochieng'	Mary Muyonga	Programmes Officer
UNESCO Nairobi Office	Ikobwa	Vick	National Programme Officer (Education)
UNESCO Nairobi Office	Segi-Vlychek	Yayoi	Programme Specialist (Education)
UNESCO regional Office for Eastern Africa	Djelid	Mohamed	Director
UNICEF - Eastern and Southern Africa Regional Office (ESARO)	Ackers	Jim	Regional Education Adviser
University of Nairobi	Njoka	Jamleck	Dean of Students

Lebanon

Organization	Last Name	First Name	Job Title
Centre for Lebanese Studies	Shuayb	Maha	

CERD (Center for Educational Research & Development)	Hanna	Charlotte	Director of Educational planning
ESCWA (Economic & Social Commission for Western Asia)	Khawaja	Marwan	Chief Demographic & Social Statistics
ESCWA	Khoury	Nadim	Deputy Executive Secretary
Ex NATCOM Commissioner	Al Seniora	Salwa	Ex Natcom Commissioner till 2013, currently Hariri Foundation Director
ILO, International Labor Office	Hagemann	Frank	Deputy Regional Director
LAES, Lebanese Association Education Sciences)	Amin	Adnan	Researcher
MOE, EDP (Education Development Project)	Mneimneh	Nada	Director
MOE, Faculty of Education	Ayoubi	Zalfa	EFA Lebanon Committee
MOE, Faculty of Education	Komaty	Elham	EFA Lebanon Committee
NATCOM	Darwish	Zahida	Secretary General
Researcher	Bashshur	Munir	Professor, AUB
Researcher Think Tank	Bibi	Ghanem	Founder Arab Resource Collective, now adviser
UNESCO Regional Office	Belkachle	Said	Now Director Field Office Khartoum, before Head of Planning
UNESCO Regional Office	Hijazi	Idriss	TVET Coordinator
UNESCO Regional Office	Suleiman	Suleiman	EFA Coordinator
UNFPA UN Population Fund	Naja	Nada	National Program Officer Reproductive Health
UNHCR	Karlston	Kersten	Education Chief
UNICEF	Calestini	Luciano	Head of Mission
UNICEF	Aboud	Amal	Education Section
UNICEF	Hammoud	Nathalie	Education Section
USJ (University St. Joseph)	Salameh	Ramzi	Researcher
World Bank	Moreno	Juan	Lead Education Specialist

Russia

Organization	Last Name	First Name	Job Title
Academy of Social Management	Firsova	Anna	Head of Monitoring and Statistics Centre for the quality of education
Committee of the Workers' Union of Public Education and Science of the Russian Federation	Livshits	Vladimir	Secretary of the Central Committee
Federal State Autonomous Institution "Federal Education Development Institute"	Alieva	Evelina	Head of the Department for education development strategies
Federal State Autonomous Institution "Federal Education Development Institute" / The World Bank	Prudnikova	Viktoriya	Director of the Volga Branch/Consultant
Intel Corporation	Livenets	Marina	Head of regional educational programs of Intel Corporation
Irkutsk State Linguistic University	Kostin	Aleksandr	Professor
Ministry of Education and Science of Russian Federation	Zyryanova	Anastasiya	Director of the Department for State policy in the sphere of secondary education
National Research Institute "Higher School of Economics" / The Eurasian Association on Educational Assessment	Bolotov	Viktor	Research advisor in the Centre for Education Quality Assessment /President

Non-profit partnership "Interregional Association for Monitoring and Statistics of Education"	Agranovich	Mark	Managing Director
State Institution of Yamal-Nenets Autonomous Okrug "Regional Centre for Education Quality Assessment"	Vesova	Yana	Director
State research institute of technologies and telecommunications «Informika»	Tsvetkov	Viktor	Professor, Leading Researcher
The Public Chamber Commission for Educational Development / Educational Centre "Tsarina" (school number 548, Moscow)	Rachevskiy	Efim	Member/ Director
The State Duma Committee on Education	Kondrashov	Pavel	Chief of staff
The World Bank	Shmis	Tigran	Head of the World Bank education projects in Russia
UNESCO Moscow Office	Epoyan	Tigran	UNESCO Regional Advisor for Eastern Europe and Central Asia

Senegal

Organization	Last Name	First Name	Job Title
Canadian International Development Agency	Diome	Ibrahima	Education Specialist
Cosydep	Mbow	Cheikh	Executive director
Dakar Cheikh Anta Diop University	Fall	Babacar	Professor
Direction of Literacy and National Languages	Mara	Mamadou	Technical Advisor
Education Research and Planning direction, Ministry of Education	Ndiaye Diouf	Djibril	Director
EFA National Coalition	Sy	Gorbal	Executive director
Elementary Education Direction, Ministry of Education	Diaw	Abdou	Director
LARTES (Research Laboratory on education quality)	Salam Fall	Abdou	Director
Ministry of Education	Dieng Sarr	Aissatou	Girls Education Specialist
Ministry of Vocational and Professional Education	Top	Ngoné	Technical Advisor
National Commission for UNESCO	Ly	Aliou	General Secretary
National Institute for Study and Action for Education Development, Ministry of Education	Ba	Ibrahima	Director
Réseau des journalistes pour l'éducation et la formation (REJEF) Network of Journalists for Education and Training	Lom	Mika	President
UNESCO	Diawara	Rokhaya	Education Specialist
UNESCO	Husson	Guillaume	Education Specialist
UNESCO Library	Muller	Anne	Education Specialist
UNESCO Pole of Dakar	Bernard	Marc	Education Specialist
UNESCO Pole of Dakar	Kouak Tiyaab	Beifith	Education Specialist
USAID	Momar Sow	Pape	Education Specialist

UK

Organization	Last Name	First Name	Job Title
Association of Directors of Children's	Brennan	Paul	Deputy Director of Children's Services

Services			
Association of Directors of Children's Services	Freeman	John	Former President
Association of Directors of Children's Services	Littleton	Carmel	Member
Association of Directors of Children's Services	Shethwood	Kate	Policy Officer
City of York Council	Squire	Maxine	Principle Advisor for Secondary Schools / Interim Assistant Director for Education and Skills
Department for International Development	Hennell	Sarah	Education Policy Team
Department for International Development	Whitby	Rob	Deputy Head, Education Policy Team
Institute of Education, London University	Bourn	Douglas	Director, Development Education Centre
Leeds Development Education Centre	Ranson	Adam	Projects Coordinator
Think Global	Franklin	Tom	Director
UK UNESCO National Committee	Bridge	James	Chief Executive
UK UNESCO National Committee /General Council of Teachers in Wales	Brace	Gary	Education Director/ Chief Executive
University of Edinburgh/NORRAG/UKFIET	King	Kenneth	Professor of International and Comparative Education
University of Glasgow, School of Education	Livingston	Kay	Professor of Educational Research, Policy and Practice/ Member of UK Nat Com Board of Directors
University of Ulster	Smith	Alan	Professor of Education/ UNESCO Chair for Pluralism, Human Rights and Democracy

Viet Nam

Organization	Last Name	First Name	Job Title
BTC	Lambrect	Hans	Budget support advisor, education sector
Child Funds	Tuyet Nhung	Ha Thi	Education manager
Ministry of Labor, Invalids and Social Affairs (MOLISA), Vocational Training Dept.	Van Tien	Mac	President of the Vocational Training Research Institute
Ministry of Planning and Investment (MPI)	Lan Huong	Phan Thi	Vice Director General of Dept. of Education, Science and Environment
Ministry of Planning and Investment, Development Strategy Institute	Thanh Tung	Doan	Vice director of Human resource Dev. division
MOET, Planning and Finance Dept.	Thuy		Official
MOET, Planning and Finance Dept.	Dai Hai	Tran	Director of the ODA division
Plan International	Bich Hanh	Le Thi	Education program manager
Vocational Training Dept, MOLISA/ Amending Law on Vocational training drafting team	Chinh Thuc	Phan	Former Director General/ current member
Viet Nam Institute of Educational Sciences (VNIES)	Huu Chau	Nguyen	Former President
Lao Cai provincial Dept. of Education and	Kim Minh	Truong	Former Director

Training			
Human resource Dev. Division, DSI, MPI/ 2011- 2020 National Strategy on Human resource Development drafting team	Van Thanh	Nguyen	Former Director/ former Head
Non-official education center, VNIES	Xuan Dao	Thai Thi	Former director
USAID	Simon	Ezra	Education officer, Environment and Social Development Office
Vietnam UNESCO field office	Lei	Sun	Education Program Coordinator
Vietnam UNESCO field office	Muller- Marin	Katherine	Representative and Head
Vietnam UNESCO field office	Thi Thanh Tam	Tran	National Program Officer in Education
VNIES	Thanh Xuan	Bui	Research unit head, Non-official education center, VNIES
VNIES	Van Kha	Phan	President of VNIES
VVOB	Lenaerts	Filip	Education Manager
World Bank	My An	Tran Thi	Education specialist
World Bank	Nha	Vu Thi	Development Information centre officer

Appendix 4: Main documents consulted

Internal GMR documents

2013 Education for All Global Monitoring Report Teaching and Learning for Development, Thematic note, 2013

Benchmarks for the GMR on social media, 2011

Blog and social media strategy: 2012 GMR on Youth, skills and work, 2012

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EFA GMR Management report to funding agencies: January to June 2013

EFA GMR Management report to funding agencies: January to June 2011

EFA GMR Management report to funding agencies: July to December 2010

EFA GMR Management report to funding agencies: July to December 2011

EFA GMR Management report to funding agencies: July to December 2012

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Eleventh meeting of the Advisory Board, Report on the Donors Meeting, May-10

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GMR twitter guidelines

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Appendix 5: Multi-donor trust funds

MDTFs in the UN system

Typically MDTFs in the UN system are pooled grant-making funds. They range widely in size and the number and type of donors contributing to them. UNESCO, for example, manages a number of MDTFs associated with its Conventions (e.g. the International Fund for Cultural Diversity established under the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions), and also other grant-making Funds such as the International Fund for the Promotion of Culture, which is not allied to a Convention and has received financial contributions from Member States, private foundations and individuals.

The World Bank manages a very wide range of MDTFs⁵⁶ that “combine the contributions of multiple donors, generally for a program of activities over many years. Their arrangements include standard legal agreements with all donors, which specify governance procedures covering trust fund management, operational and financial reporting, and the allocation and uses of funds. Bank-administered MDTFs do not allow donors to earmark funds to specific activities or recipients.”⁵⁷

UNDP⁵⁸ notes that “MDTFs are not one-size-fits-all instruments; they are designed to fit the realities of a specific country or global situations. Nevertheless, they are established on common core principles and strategies such as:

- Involve a broad range of stakeholders, including national authorities, Contributors/Partners, Participating UN Organizations in the decision-making process, as appropriate;
- Build on existing frameworks or plans rather than creating new, parallel structures;
- Strengthen aid effectiveness through coordination and harmonization of interventions to ensure increased coherence, efficiency, reduction of management and reporting burdens and associated transaction costs;
- Ensure that the funding, operations and implementation modalities provide for full transparency and accountability;
- Focus on expedient delivery with concentrated focus on results.”

MDTF example analogous to the GMR/education monitoring function

The International Comparison Program (ICP) is a programme supported by a multi-donor fund and managed by the World Bank. It presents a good example of a programme similar in purpose and scope to the GMR and to the post-2015 education monitoring function in a GDF:

Background

“A multi-donor trust fund was established in April 2010 to support the implementation of the 2011 round of the International Comparison Program (ICP). The ICP provides direct support to the Bank’s core mission by providing a crucial component of the data needed to monitor income poverty internationally and to analyze changes in the comparative welfare. The ICP contributes to the

⁵⁶ See World Bank (2012), *Directory of programs supported by trust funds. As of March 31, 2012*, Finance and Global Partnerships Vice Presidency, p.38

⁵⁷ From <http://web.worldbank.org/WBSITE/EXTERNAL/PROJECTS/STRATEGIES/EXTLICUS/0,,contentMDK:22214607~pagePK:64171531~menuPK:3937942~piPK:64171507~theSitePK:511778,00.html>

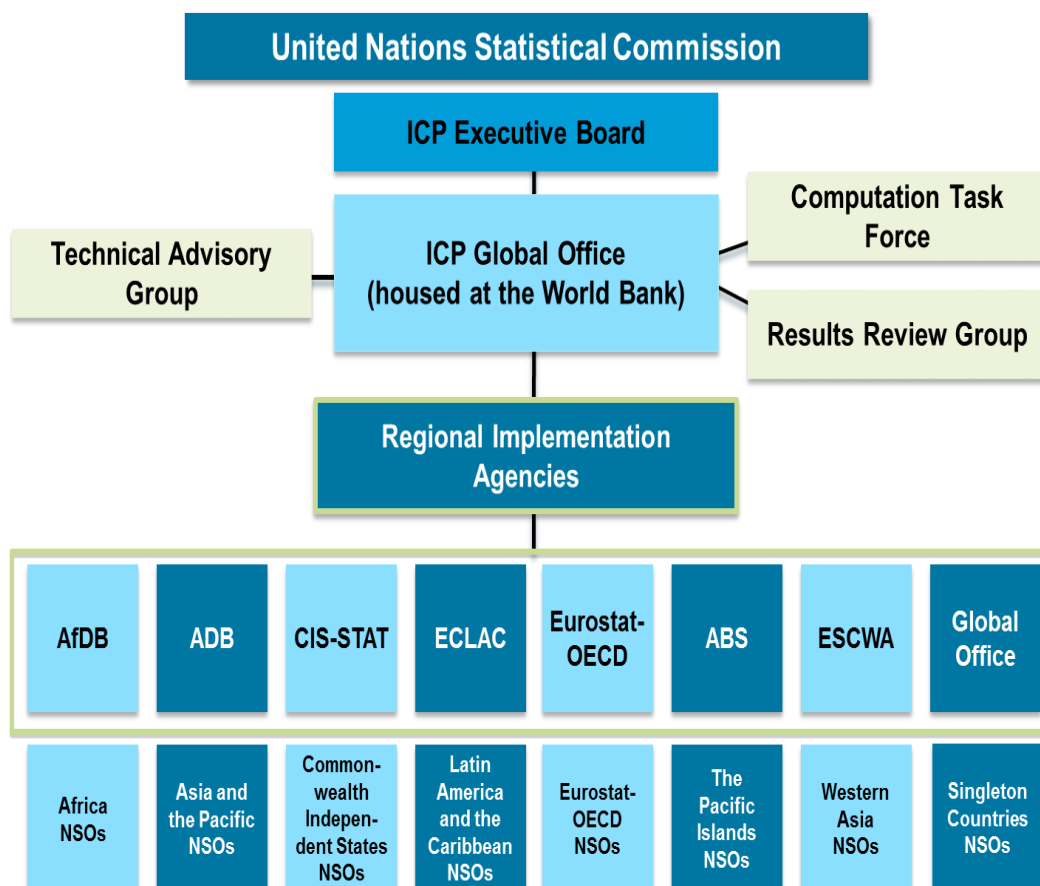
⁵⁸ <http://mptf.undp.org/overview/funds>

dissemination of good quality data on poverty and economic progress to support evidence-based decision making at all levels, by collecting and disseminating purchasing power parity (PPP) data to compare economic and social conditions among countries without the distortion of short-run fluctuations in foreign exchange markets or structural differences in price levels. In particular, PPP data are needed to monitor progress towards achieving the Millennium Development Goal (MDG) of eradicating extreme poverty and hunger.

The development objectives of this new multi-donor trust fund include: supporting the implementation of the 2011 round of the ICP, which aims at improving crosscountry measurement and monitoring of poverty and other economic variables (e.g., income per capita); the development of a cost-effective process for estimating PPPs in different countries and regions; improved statistical capacity in developing countries (price statistics, national accounts and poverty monitoring); and, the continuation of ICP as a global program with reduced costs due to improved efficiency/increased capacity in participating countries.

To date, four donors have pledged contributions to this trust fund. They are the International Monetary Fund (IMF) with a pledge of US\$0.9 million, the UK Department of International Development (DFID) with a pledge of £4 million, the Government of Norway with a pledge of Nkr3.5 million, and the Australian Agency for International Development (AUSAID) with a pledge of \$A1 million. Contributions are paid in tranches.”⁵⁹

Governance structure of the ICP



⁵⁹ From World Bank (2012), *Directory of programs supported by trust funds*, p.38

The Role of the ICP Executive Board

“The Executive Board is accountable to the UNSC for the progress of the ICP. It will provide annual status reports to the UNSC. It will provide guidance on the overall project and its specific elements, as required.

Members of the Executive Board will serve as representatives of their organizations. In carrying out Executive Board business, members will follow their respective agencies’ administrative rules and procedures.

Membership will include representatives from the Eurostat, OECD, International Monetary Fund, the World Bank, and the United Nations Statistics Division. Each regional coordinating agency will also hold a seat on the Executive Board.

The membership will also include representatives of countries participating in the ICP. Countries will be selected to provide a balance across the regions and to provide representation of those with different economic structures and statistical capacity. Countries providing assistance to the regional and global programs will be included on the Board.

The list of member organizations, but not the individuals, will be specified by the Bureau of the UNSC and will serve for the duration of the round.

Members representing their organizations will be at a senior level of director or manager of statistical operations or Chief Statistician.”⁶⁰

Terms of Reference: ICP Executive Board

“In providing guidance, the ICP Executive Board will have the following responsibilities:

1. Provide leadership in determining strategic priorities
2. Oversee the ICP global partnership arrangements
3. Promulgate ICP standards
4. Approve annual work programs and budgets, and strategic decisions on use of resources
5. Provide support for advocacy and resource mobilization
6. Oversee the activities of the ICP Global Office on the basis of work programs and progress reports
7. Ensure the availability of needed frameworks aimed at improving the quality and timeliness of published data, methodologies, and related guidelines.
8. Define the dissemination policy for ICP results and provide guidance on outreach activities
9. Review, approve, and submit status reports prepared by the Global Office to the UN Statistical Commission
10. Provide input to the appointment and performance evaluation of the Global Manager
11. Commission evaluations of the ICP
12. Act to resolve any conflicts both within the program and between the program and its external environment.
13. Approve the membership of the Technical Advisory Group and the selection of the Chair.”⁶¹

⁶⁰ From: ICP2011 (2009), “Governance framework for the Management and Implementation of the 2011 Round of the International Comparison Program”, pp.6-7

⁶¹ Ibid, p.10



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