

# Global Education Monitoring Report Strategy

## 2019–2022



United Nations  
Educational, Scientific and  
Cultural Organization



Global  
Education  
Monitoring  
Report

## The Global Education Monitoring Report, in brief

Achieving the fourth Sustainable Development Goal (SDG 4) on education requires sound evidence and analysis to support policy-making, facilitate the sharing of good practice, and hold those responsible to account for fulfilling their commitments. The *Global Education Monitoring Report* (GEM Report) is the global public good that serves this purpose.

Established in 2002, the GEM Report is an editorially independent report, hosted and published by UNESCO. At the 2015 World Education Forum, it received a mandate from 160 governments to monitor and report on:

- Progress on education in the Sustainable Development Goals (SDGs), with particular reference to the SDG 4 monitoring framework
- The implementation of national and international strategies to help hold all relevant partners to account for their commitments, as part of the overall SDG follow-up and review process.

The annual GEM Report is based on multiple sources of data, which enables it to provide a macro view of education issues. Through multiple communication channels, it reaches all regions of the world. It serves as a foundation for evidence-based advocacy to promote progress towards SDG 4, including by convening dialogue on education issues among key decision makers that can effect policy change.

With 15 editions between 2002 and 2019, the GEM Report is an indispensable part of the global education architecture. Four evaluations, including one carried out in 2018, have found that it successfully fulfils its mandate, providing rigorous, relevant, high-quality and authoritative evidence for its broad audiences. Its users include but are not limited to: governments (including leadership and senior civil servants of ministries of education and finance and implementing agencies); experts (including academic researchers, think tanks and consultants); multilateral, international, regional and national development organizations; teachers and their unions; youth, students and their organizations; civil society and non-government organizations engaged in education; and the general public.

GEM Report partners and stakeholders recognize and highly commend the quality and reliability of the data and analysis that the GEM Report provides to inform current policy debates around the world. Given the GEM Report's strong track record to date and its

perceived further potential, its partners expect it to continue to develop ways to help shape education policy debates and decisions at regional and national levels. However, this requires the GEM Report to take on additional responsibilities, a challenge to which the GEM Report team is keen to respond through this 2019–2022 GEM Report Strategy.

## Refining the GEM Report's strategic direction

The GEM Report's **vision** is to serve as the main resource for decision makers who seek comparative research and knowledge to inform their actions on inclusive and equitable quality education at national, regional and global levels. Its **mission** is to synthesise, analyse and clearly present the best available data, evidence and research to explain progress and differences in education, and to make recommendations that stimulate reflection and dialogue and thereby improve policymaking.

The GEM Report team aims to fulfil its vision and serve its mission in accordance with its core **values**:

- **Quality:** We commit to maintaining the highest standards in our reporting of evidence and data so as to be able to inform advocacy and hold education stakeholders to account for delivering on their commitment to SDG 4.
- **Independence:** We commit to maintaining our editorial independence, which is essential to serving our audiences and stakeholders; the GEM Report is not beholden to the interests of any country, organization, agenda or group, and we commit to upholding that autonomy.

The **theory of change** underlying the GEM Report's approach is based on the idea that, by making rigorous evidence, data and recommendations on education available and accessible, the GEM Report will improve policy dialogue and peer learning and will strengthen education systems, plans, policies and budgets towards achieving SDG 4.

The strategy maintains the GEM Report's core products while aiming to focus more closely on informing policy dialogue and strengthening partnerships to increase the GEM Report's relevance to decision makers at regional and national levels. The strategy will deliver three outputs:

1. **Evidence, research and data:** The GEM Report will continue to identify, compile, synthesise and analyse the latest and most compelling research

in international education, with an emphasis on cross-country and over-time comparisons informed by national contexts. The ambition is to maintain and, where possible, to improve the quality, relevance and accessibility of the evidence and data used. This output is supported by:

- Existing publications and databases (GEM Report and Summary, Youth Report, Gender Report, policy papers, World Inequality Database on Education), which provide comparative research, data and good practice case studies on interventions that have effectively addressed education challenges.
- A new website on monitoring progress towards SDG 4 featuring interactive visualizations that can provide a snapshot of the main trends in key education indicators, enable users to make comparisons and explain the reasons behind the trends observed.
- A new series of regional reports to better serve audiences and promote policy dialogue at the regional level, and, if resources allow, a closer focus on particular countries that are furthest behind.
- A new website with country profiles providing up-to-date and comparative qualitative data on education policies to help countries engage in peer learning through policy dialogue mechanisms at the regional level.

**2. Communication and outreach:** Based on its research and data, the GEM Report will continue to distil key findings, formulate clear messages and develop global communication and outreach outputs that can be further developed into regional and national policy and programmatic responses. To successfully increase awareness of SDG 4 and strengthen accountability among education stakeholders, the GEM Report's messages and recommendations on good practices must be made more visible and more closely targeted to relevant audiences. To do so, the GEM Report will:

- Ensure regular, targeted circulation of its findings in print, broadcast, electronic and social media
- Provide up-to-date and accessible material on its website and on the World Education Blog
- Develop targeted social media campaigns and online debates, videos and visuals
- Strengthen its distribution mechanisms.

**3. Policy advocacy and knowledge sharing:** The launch of the GEM Report in various international,

regional and national fora has been the key strategic tool used to inform and influence policy. A critical lever to further improve the GEM Report's visibility will be the development of strategic partnerships, especially at regional level, and the engagement of the GEM Report in regional policy dialogue mechanisms and peer learning exchanges. By bringing together expertise, assets and resources from across the United Nations system and the education architecture, and by collaborating closely with regional bodies in support of national governments, the GEM Report will be better positioned to inform policy dialogue and change at national and regional levels.

Key **assumptions** underpinning the work of the GEM Report team are: a continued international and national focus on and commitment to meeting the education SDG and its targets; and the existence of sufficient capacity by policy makers to use and interpret the data and analysis for policy impact.

The GEM Report will celebrate 20 years in existence in 2022, a remarkable example of resilience for a publication of its kind, and a testament to the trust of its donors, audiences and stakeholders and the resourcefulness of the GEM Report team. Nevertheless, the strategy identifies four **risks**: inadequate or unpredictable finance; a multiplicity of education reports; misunderstanding of the GEM Report's mandate; and operational capacity constraints.

## Finance

The GEM Report operates under a special account modality, whereby all contributions from multiple donors are pooled. The special account allows for flexibility in the allocation of resources towards the commonly agreed priorities identified in the project's logical and results frameworks. Twice a year, the GEM Report team prepares a management report that provides a narrative update of progress relative to the results framework and consolidated financial statements. The special account adheres to UNESCO's financial, administrative and procurement protocols as well as the special account's financial regulations.

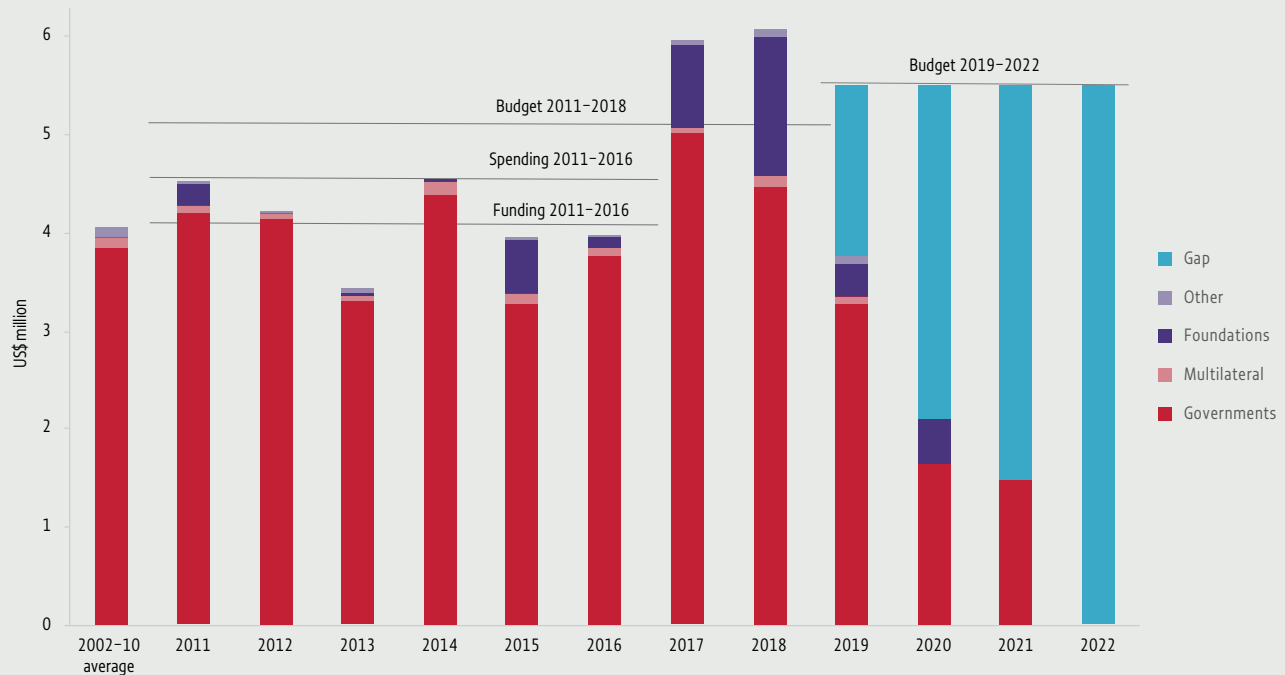
The GEM Report is funded by governments, multilateral organizations and foundations. The number of funders expanded from 10 to 17 between 2011 and 2018. From the GEM Report's inception until 2016, 93% of its income came from governments; in 2016–2018, that share fell to 86%, as the share of foundations increased to 12%. About 1% of the GEM Report funding comes from UNESCO. The GEM Report also

receives non-financial support in the form of in kind contributions (for example, funding of staff positions) and, in exceptional cases, earmarked funding that fully aligns with the GEM Report’s core mission. As of 2019, the budget increased from US\$5.1 million, a level at which it had been stable for more than a decade, to US\$5.5 million, to account for some of the rising costs and increased activities in recent years.

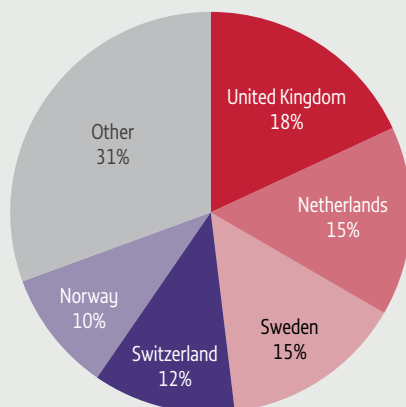
As of the last quarter of 2019, 70% of the income required for 2019 and 22% of the income required for 2020–2022 has been secured. The following are key aims of the fundraising and financing strategy:

- Secure larger and more multi-year agreements to enhance financial stability and reduce the administrative costs of processing yearly funding agreements, which accounted for half of the total in 2018.
- Ensure long-term donors continue to support the GEM Report.
- Continue to widen the donor base, including by producing new outputs that may appeal to new donors, while ensuring that all donors continue to commit to pooling their resources in the special account.

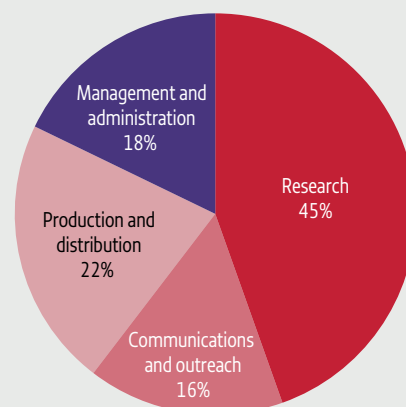
GEM Report revenues by type of donor and financing gap, 2019–2022



Largest donors, 2002–2018



Distribution of spending by category, 2018



- Better demonstrate efficiency by tracking the individual output unit costs, building on the value-for-money indicators on which the GEM Report provides information to its donors.
- Continue to improve the ways in which the GEM Report identifies and reports the use of its outputs and, where possible, its influence on global, regional and national education policies.

- Sources of expertise, knowledge, information and funding
- Communications and outreach, including advocacy, publications and partnerships.

The Board is convened by UNESCO, meets once a year and consists of 35 members. Its Chairperson serves for up to three years; Helen Clark was nominated in 2018. The Assistant Director-General for Education of UNESCO and the Director of the UNESCO Institute for Statistics serve as ex officio members. The remaining members come from 7 constituencies: UNESCO (4); multilateral organizations (5); donors (5–6); regional experts nominated by UNESCO electoral groups (5); regional organizations (up to 4); civil society organizations (up to 5); and independent experts (up to 4).

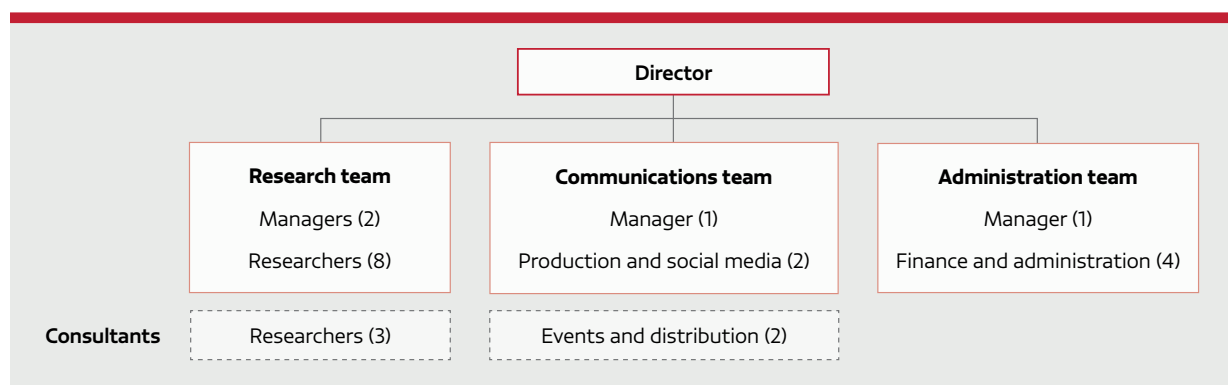
## Governance of the GEM Report

The GEM Report has an **Advisory Board** which provides oversight, guidance and suggestions about:

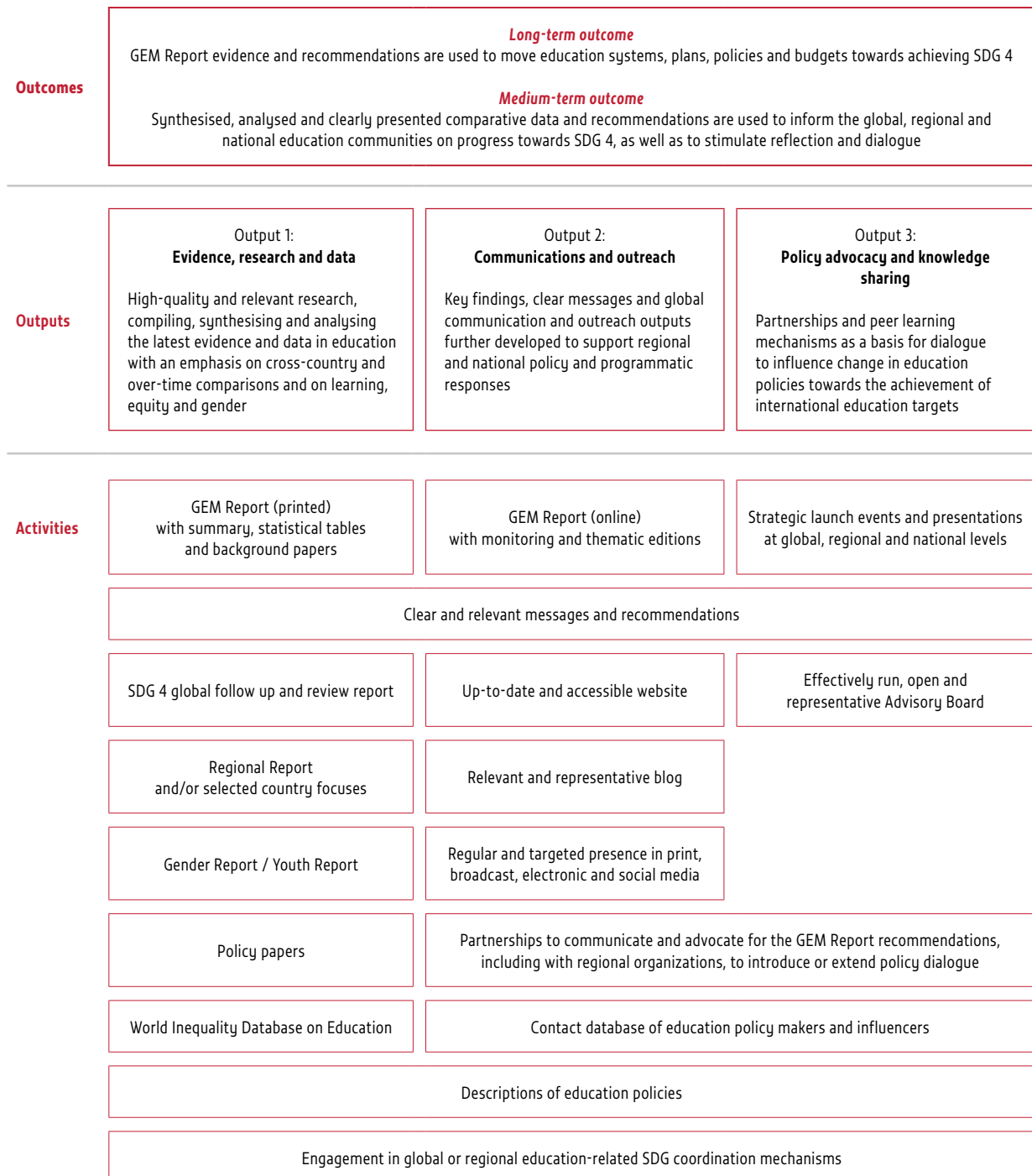
- The vision, purpose and objectives of the GEM Report and their consistency with SDG 4 / the Education 2030 Agenda
- The national, regional and international context
- Future GEM Report themes, priorities and approaches
- The long-term development of the GEM Report
- The identification of problems, priorities and concerns
- The quality and timeliness of SDG 4 statistics and data

## The GEM Report team

As of 2019, the GEM Report team employs 19 members in 3 teams. There are about five full-time equivalent consultants. Staff competencies include monitoring and reporting, analysis and research, advocacy, management, communications, production, publishing, financial management and operations. Implementing the strategy implementation will require expansion into new areas, and the skills needed will be obtained through professional development and recruitment.



## Project logical framework



## Project results framework 2019–2022

Indicators Within a 15-month report cycle on average	Baseline 2018 GEM Report cycle	Target 2019 GEM Report cycle	Target 2020 GEM Report cycle	Target 2021 GEM Report cycle	Target 2022 GEM Report cycle
<b>Long-term outcome:</b> Report evidence and recommendations <b>used to move</b> education systems, plans, policies and budgets towards achieving SDG 4					
<b>Medium-term outcome:</b> Synthesised, analysed and clearly presented comparative data and recommendations <b>used to inform</b> education communities on progress towards SDG 4					
0.1 Report informed policy dialogue at global, regional and national level	5 examples	5 examples	5 examples	5 examples	5 examples
<b>Output 1</b>					
<b>Research and data:</b> High-quality and relevant research, compiling, synthesising and analysing latest evidence and data in education with emphasis on learning, equity and gender					
1.1 Global report (with statistical tables) produced and launched	1	1	1	1	1
1.2 Regional Report produced and launched	0	1	1	1	1
1.3 Gender Report produced and launched	1	1	1	1	1
1.4 Youth Report produced and launched	1	1	1	1	1
1.5 Policy papers produced and launched	4	4	4	4	4
1.6 Background papers commissioned from the Global South	TBD	50%	50%	50%	50%
1.7 Country profiles in a policy area developed and validated	No	No	Yes	Yes	Yes
1.8 Number of consultation events   Of which in Global South	TBD	1   1	3   1	5   3	5   3
<b>Output 2</b>					
<b>Communications and outreach:</b> Key findings, clear messages and global communication and outreach outputs developed to support regional and national policy and programmes					
2.1 Copies printed   Distributed	Global report (English)	10,500   80%	8,000   80%	7,500   90%	7,500   90%
	Global report (other)	4,000   80%	4,000   80%	4,000   80%	4,000   80%
2.2 Language versions of the report summary		20	25	25	25
2.3 Downloads in first year	Global report (English)	100,000	100,000	100,000	100,000
	Global report (other)	5,000	5,000	5,000	5,000
2.4 Downloads in month of launch	Global report (English)	7,000	7,000	8,000	8,000
2.5 Online views in month of launch   Of which in Global South	Global report (English)	10,000   25%	10,000   25%	10,000   30%	12,500   30%
2.6 Number of page views   Of which in Global South	Website	300,000   30%	400,000   35%	415,000   40%	450,000   40%
	Monitoring website	0	0	25,000   TBD	35,000   TBD
	WIDE	112,000   25%	115,000   25%	120,000   25%	125,000   30%
2.7 Animation   Video to promote the GEM Report		Yes   Yes	Yes   Yes	Yes   Yes	Yes   Yes
2.8 Blogs produced per month		4	4	6	8
2.9 Blog visitors per month   Of which in Global South		25,000   45%	25,000   45%	25,000   45%	25,000   45%
2.10 Media articles at time of launch: Tier 1   Total		50   1,200	50   1,200	50   1,200	50   1,200
2.11 Twitter followers   Twitter impressions		70,000   7 million	75,000   7 million	80,000   7 million	85,000   7 million
2.12 Contacts in customer relationship management system		No system	System in place	5% increase	5% increase
<b>Output 3</b>					
<b>Policy advocacy and knowledge sharing:</b> Partnerships and peer learning mechanisms as a basis for dialogue to influence change in education policies towards international targets					
3.1 Number of events where GEM Report products are launched   Of which in Global South		70   50%	70   50%	70   50%	70   50%
3.2 Senior officials attending events		50	55	60	70
3.3 Policy dialogue events engaging GEM Report expertise   Of which in Global South		0	5   80%	8   80%	10   80%
3.4 New global and regional partnerships established		0	1	2	4
3.5 Campaign launched on theme of report		Yes	Yes	Yes	Yes

## Risks and mitigating measures

Risk	MITIGATING MEASURES		
	Quality and relevance of research and communications	Clarity and targeting of messaging	Strength and diversity of partnerships
<b>Inadequate or unpredictable finance</b>			
<ul style="list-style-type: none"> <li>Funders increasingly want to tie support to specific outputs, which diverts attention from GEM Report mandate</li> </ul>	Strengthen research and communication to highlight the global public good features of the GEM Report	Develop and share consistent messaging on the global public good value and editorial independence of the GEM Report	Strengthen partnerships with organizations sharing the global public good features of the GEM Report
<ul style="list-style-type: none"> <li>Single-year agreements increase administrative and management costs</li> </ul>	Identify and engage donors willing to engage in multi-year predictable financing for global public goods	Develop and share consistent messaging on the need for long-term agreements	
<ul style="list-style-type: none"> <li>Funders' expectations can conflict with the GEM Report's universal mandate</li> </ul>	Focus research outputs on major education challenges in Global South but draw South-North parallels	Focus messaging on major education challenges in Global South but draw South-North parallels	Strengthen partnerships with ministries of education in Global South and North
<b>Multiplicity of education reports</b>			
<ul style="list-style-type: none"> <li>The GEM Report is operating in a landscape in which several national, regional and international organizations publish education-related reports that vie for stakeholder and media attention</li> </ul>	<ul style="list-style-type: none"> <li>Ensure quality of evidence and data to maintain reputation</li> <li>Pilot systematic education policy profiles to use as basis for peer learning</li> <li>Pilot the development of regional reports and partnerships to increase relevance</li> <li>Increase consultation processes during report development</li> </ul>	<ul style="list-style-type: none"> <li>Increase relevance, clarity and accessibility of GEM Report messages</li> <li>Make blog entries more up to date and geographically representative</li> <li>Improve contact database</li> </ul>	<ul style="list-style-type: none"> <li>Strengthen and expand network of launch event partners</li> <li>Strengthen and diversify pool of research partners</li> <li>Strengthen ties with national monitoring reports</li> <li>Strengthen support to policy advocacy and partnerships within the GEM Report team</li> </ul>
<b>Misunderstanding of Report mandate</b>			
Stakeholders are not always aware that the independence of the GEM Report is crucial	Preserve the impartial nature of the report and ensure research and communications continue to fulfil mandate to hold all partners to account	Continue consistent messaging on the importance of maintaining the GEM Report's independence	Strengthen partnerships with organizations that value and champion the GEM Report's editorial independence
<b>Operational capacity</b>			
Capacity is inadequate to handle increased level of activity	Identify skills required for the research and communication efforts of the GEM Report and engage in professional development or tailored recruitment	Engage in securing additional resources to strengthen the communication and outreach work of the GEM Report, including at regional level	Strengthen partnerships with organizations with relevant education research and outreach expertise at regional and national levels



## Global Education Monitoring Report outputs

Global report		Outputs related to the global report	
<i>Education for All Global Monitoring Report</i>		<a href="#">Summary</a> in 26 languages in 2019	
2002	<a href="#">Initial EFA assessment</a>	About 40 <a href="#">background papers</a> per year	
2003/4	<a href="#">Gender</a>	<a href="#">Statistical tables</a>	
2005	<a href="#">Quality</a>		
2006	<a href="#">Literacy</a>		
2007	<a href="#">Early childhood</a>		
2008	<a href="#">Mid-term EFA assessment</a>		
2009	<a href="#">Governance</a>		
2010	<a href="#">Marginalization</a>		
2011	<a href="#">Conflict</a>		
2012	<a href="#">Youth and skills</a>		
2013/4	<a href="#">Teaching and learning</a>		
2015	<a href="#">Final EFA assessment</a>		
<i>Global Education Monitoring Report</i>			
2016	<a href="#">Education and other SDGs</a>		
2017/8	<a href="#">Accountability</a>		
2019	<a href="#">Migration and displacement</a>		
HLPF	<a href="#">Meeting commitments</a>		
HLPF	<a href="#">Beyond commitments</a>		
2020	<a href="#">Inclusion</a>		
2021	Non-state actors		
2022	Technology		
		<b>Other outputs</b>	
		<a href="#">Youth Reports</a> since 2011	
		<a href="#">Gender Reports</a> since 2011	
		40 <a href="#">policy papers</a>	
		World Inequality Database on Education ( <a href="#">WIDE</a> )	
		<b>Communications</b>	
		<a href="#">Launch events</a> in 70 countries	
		<a href="#">World Education Blog</a> read by 25,000 people	
		<a href="#">Media</a> coverage in more than 100 countries	
		<a href="#">Infographics, animations and videos</a>	
		<a href="#">Twitter</a> account with 75,000 followers	
		<b>New outputs</b>	
		<a href="#">Fellowship programme</a> in 2019	
		Regional reports in 2019	
		Online monitoring report in 2020	
		Country profiles in 2020	

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Developed by an independent team and published by UNESCO, the *Global Education Monitoring Report* is an authoritative reference that aims to inform, influence and sustain genuine commitment towards the global education targets in the Sustainable Development Goals (SDGs) framework.



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