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27 April 2021

Evaluation of IIEP's Research programme – 9th Medium-Term Strategy (2014-2017)

Final report

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Abbreviations

BA: Buenos Aires

EFA: Education for all

EQ: Evaluation Question

EQA: External Quality Assurance

ER: Extra-budgetary resources

GPE: Global Partnership for Education

IIEP: International Institute for Educational Planning - UNESCO

ICT: Information and Communication Technologies

IQA: Internal Quality Assurance

MTS: Mid-Term Strategy

MDGs: Millennium Development Goals

MoE: Ministry of Education

NEA: National Education Accounts

R&D: Research and Development

RP: Regular Programme

SDG: Sustainable Development Goals

ToC: Theory of Change

ToR: Terms of Reference

TC: Technical Cooperation

UNESCO: United Nations Educational, Scientific and Cultural Organization

UIS: UNESCO Institute for Statistics

UNICEF: United Nations International Children's Emergency Fund

VfM: Value for Money

IIEP Management Response for R&D Evaluation
(20 July 2021)

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
Relevance and Coherence:			
Recommendation 1: Ensure better use is made of the knowledge and intelligence in other departments (linking to the other pillars of activity of the IIEP and wider within UNESCO), the field offices, and improve the engagement of the Research Advisory Council (RAC) in agenda setting.	**Accepted and partially implemented** - IIEP Paris, Buenos Aires (BA) and Dakar continue to collaborate across offices on research projects (e.g., School Grants, National Education Accounts (NEA), Use of Learning Assessment Data), on the preparation or translation of publications (e.g. the Secondary Teacher Management guide, and the synthesis report on Teacher Careers), and the dissemination of research findings (e.g. the International Policy Forum on Flexible Learning Pathways in Higher Education) - All IIEP offices also regularly collaborate with UNESCO field offices and National Commissions for UNESCO on research projects, dissemination and capacity development, e.g., meetings between IIPE BA, the UNESCO Regional Bureau for Education in Latin America and the Caribbean (OREALC) and Field Offices in Latin America to strengthen inter-office linkages and generate synergies, the collaboration between IIEP and the Gambian National Commission to UNESCO on the Early Childhood Education (ECE) research project, or the partnership between IIEP and the UNESCO Field Office in Uzbekistan on anti-corruption issues. - Since January 2021, IIEP Dakar and BA staff participate in weekly cross-office R&D staff meetings with IIEP Paris, including on new research priorities. - As part of the preparation of the 11th MTS research agenda, the RAC met in October 2020 to discuss trends and research priorities at the international level.	Inputs from the RAC in October 2020 feeds into the research strategy of the 11th Medium-Term Strategy (11th MTS)	September 2021
		Inputs from discussions which took place between the IIEP Paris Research and Development (R&D) Team, the Technical Cooperation (TC) Team, IIEP BA, and Dakar, and other relevant stakeholders feeds into the research strategy for the 11th MTS	September 2021

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
Recommendation 2: IIEP should take a clear position on if and how it wishes to address major UNESCO global thematic priorities (e.g., Africa, SIDS, gender equality, youth) through its R&D function and project selection mechanisms. Based on this decision, the adequate performance indicators should be adopted to reflect progress towards goals relating to these priorities.	**Accepted and partially implemented** - The 11th MTS clearly sets out the UNESCO priorities that will be addressed by IIEP over the coming years. - Work on performance indicators to measure R&D results is underway, taking into account the priorities of the UNESCO's new 2022-2029 strategy (41 C/4). - The Key Performance Indicators of IIEP's 11th Medium-Term Strategy 2022-2025 include UNESCO Priorities on Gender and Africa. - IIEP houses the Technical Team of the G7 Gender at the Centre Initiative. For that purpose, in-house expertise on gender has been reinforced with gender specialists working on gender-specific planning and policy themes and methodologies. - IIEP is fully aligned with the UNESCO Priority Africa. Under the 10th MTS, the majority of IIEP's research projects carried out a study in at least one African country. - A specific consultation meeting on IIEP's 11th MTS was held with the UNESCO Africa Group in October 2020 to seek comments to inform the Strategy. - A second consultation meeting with the UNESCO Africa Group will take place on 11 June 2021on the draft 11th MTS to allow the Group to further weigh in on the Strategy. - UNESCO's priority on SIDS continues to be addressed, through the HIV Clearinghouse. -	IIEP's 11th MTS will be aligned with the priorities of UNESCO's 2022-2029 Education Strategy (41 C/4) and 2022-2025 Programme and Budget (41 C/5)	January 2022 onwards
		In IIEP's 11th MTS, Priority Gender Equality will be monitored through a dedicated KPI: the share of projects (including Research & Development) that are at least gender-sensitive (target 2025: 100%)	January 2022 onwards
		In IIEP's 11th MTS, Priority Africa will be monitored through a dedicated KPI: the share of IIEP's portfolio in Continental Africa (target 2025 >= 50%)	January 2022 onwards

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
Recommendation 3: Measures should be taken to ensure a higher level of cross-pollination between the work conducted by the R&D function and the training and technical cooperation function. The uptake of research findings in training and technical cooperation activities can greatly enhance the IIEPs capacity to generate tangible policy changes and strengthen educational planning and human and institutional management capacities.	**Accepted and partially implemented** - Several training courses were developed entirely or in parts from research projects (online course on Internal Quality Assurance, content of Transparency and Ethics in Education and Teacher Management course updated, MOOC on Early Childhood Education). - Results of research projects have also been integrated into modules of the IIEP Advanced Training Programme (ATP) (e.g. the module on the management education systems) and other short courses. - R&D staff are involved in several Technical Cooperation (TC) projects, as well as TC staff in R&D projects, including one research project embedded in the Crisis Sensitive Planning (CSP) cluster. - Research outputs are used to generate regional technical dialogues with authorities of Ministries of Education (MoEs) in the framework of the Network of Educational Policy Specialists of Latin America. - Outputs generated by research projects (e.g. ECE, National Education Accounts, IQA, Teacher codes of ethics) are built upon to provide technical support to UNESCO Member States. - Planning tools produced by the Development unit (e.g. the Policy Toolbox) are also used in TC projects in support of MoEs (e.g. for the choice of policy options when designing a sector plan) - Consultative meetings between the R&D and TC teams are taking place to reflect proactively on ways to synergize between R&D and TC with a view to increasing impact at country level. These include ways to maximize integration of research results or expertise into TC work and vice versa.	Coordination meetings and opportunities for cross-pollination and alignment will continue between the R&D, TC and Training teams to identify potential synergies between projects and foster cross-function collaboration.	Ongoing
		A systematic assessment of whether and how R&D products can be incorporated in the training offer will be continued	Ongoing
		Information meetings on IIEP research projects will resume once the health situation allows, and the invitation will be extended to all IIEP offices as well as other UNESCO colleagues	January 2022 onwards

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
	- Under the 10th MTS, house-wide information sharing meetings took place to share research progress/results and collect feedback. These were temporarily paused during the COVID-19 crisis, but they will resume once staff return to the office.		
Recommendation 4: The IIEP should take steps to review and update the expected role and contribution of the RAC, and ensure that it's more pro-actively involved in the development of the research agenda and the review of R&D projects, while strengthening the foresight dimension of IIEP R&D work as established in the RAC Terms of Reference.	**Accepted and partially implemented** - Over the last years, the RAC has commented on a number of strategic areas, including IIEP's peer review and quality management policy for research outputs and publications, partnerships, and most recently on future trends and important areas for research. A number of RAC members have also been directly involved in research or capacity development activities linked to R&D projects.	The composition of the RAC will be renewed at the end of the current MTS. On this occasion the role of this committee will be discussed and steps taken to ensure that best use is made of this valuable asset.	January 2022
	- IIEP agrees that the RAC is an important asset the use of which could be further optimized.	Topics to be addressed under the foresight function will be identified and integrated into the R&D agenda for the 11th MTS	January 2022
Effectiveness:			
Recommendation 5: Although the research reports, case studies and policy briefs are the most important outputs of the research, in order to better reach a wider non-project beneficiary audience, the recent work on audience segmentation, coupled with the data on use of the current media mix should be used to inform the next communication strategy. This will allow the IIEP to tailor its communications approach using a diverse set of tools and channels for delivery, which is much more targeted.	**Accepted and partially implemented** - During the 10th MTS, research outputs and major dissemination events where identified from the design stage of the projects, and efforts were made to improve planning and coordination around publications and the communication linked to them.	A communication plan for each project will be defined jointly by R&D and IS building on existing UNESCO-wide guidelines.	January 2022 onwards
	- While communication around projects and research outputs (publications) has become more systematic, a communication plan has not been developed for every research project.	Joint work with specialists in data visualization (both qualitative and qualitative) will be promoted, as it can be valuable both for incorporating in the final reports of each study and for presenting and disseminating results. (This strategy is already used in the IIEP BA research project on Good Practices of Educational Inclusion of Migrants)	Ongoing

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
	- IIEP is convinced of the need to establish a forward looking and integrated communications approach to R&D under the 11th MTS, across the Institute and tailored - The work on audience segmentation will be fully exploited, internally discussed across teams, and used to inform and build this strategy. - Audience, impact and take-up analysis of IIEP R&D products has been started in order to better measure and understand IIEPs scope and influence and feed the R&D and communication strategy. - As part of the needs assessment of Latin American MoEs, an audience analysis was carried out to find out preferences and communication needs regarding the outputs of the R&D area.	The results of the audience analyses carried out by IIEP Paris and Buenos Aires will be taken into account to design a communication and dissemination plan that responds to these preferences.	July 2021
		Further audience, impact and take-up analyses of IIEP R&D products will be undertaken and IIEP's communication plan adapted accordingly	January 2022 onwards
Efficiency:			
Recommendation 6: IIEP can explore several avenues to diversify its sources of funding: - Increase fundraising acumen in order to bring in additional contributions from voluntary donors - Pro-actively seek to obtain research grants to conduct research projects - Conduct research in collaboration with other research partners - Host third party researchers or post-docs within the IIEP - Apply mandatory co-financing by research project partners and	**Accepted (with reservations) and partially implemented** - Fundraising efforts have increased greatly over the course of the 10th MTS. Financial and in-kind contributions have grown as well. - A position of a Resource Mobilization Officer was filled within the R&D team during quarter 2 of 2021 to further support fundraising efforts. - R&D staff took internal and external training on fundraising and partnership building. - The R&D team took steps to systematize their fundraising activities through the development of a draft fundraising strategy for the R&D function. Nevertheless, IIEP will take a targeted approach in the application of the recommendations for the following reasons:	An R&D-specific fundraising strategy will be developed building on previous work.	December 2021
		Exchange of experiences on fundraising will be strengthened within the R&D teams across offices	September 2021
		Similar to developing an R&D fundraising strategy, R&D projects under the 11th MTS will adopt a mixed funding approach with cost of case study production to be shared as much as possible and systematically with national partner organizations	January 2022 onwards

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
beneficiaries in the selection and the implementation of the R&D projects - Further outsource the research to external researchers. - Implementing a cost recovery model, in a similar fashion to the model implemented by the TC pillar	- Not all projects are equally attractive to donors, and IIEP is conscious that definition of the research agenda should focus primarily on country needs rather than entirely on funding opportunities. - Given its global and public good mandate, IIEP will not exclude pressing research needs and priority beneficiaries from its research due to financial constraints of its beneficiaries. - IIEP believes that it is important for researchers to be directly implicated in the research processes and outputs, to develop their expertise and that of IIEP at large.		
Recommendation 7: Proactively seek new partners for the purposes of: - Increasing access to funding - Increasing access to research capability - Increasing knowledge on emerging research themes Continue to deepen partnership relations, capitalising on person-to-person communication, co organising of communication activities. Link the partnering model closely to the communication strategy (as an audience).	**Accepted and partially implemented** - The development of research partnerships – both financial and intellectual – has been a key strategy for IIEP in recent years. This work is ongoing and will continue over the coming years. - IIEP will continue to foster relations with existing partners and seek to expand its networks, using available tools and resources (RAC, academic networks, personal contacts, etc.). - Partnerships will be sought at subnational, national and international level. - IIEP actively takes part in a selection of well targeted international fora and conferences for strategic networking and fundraising (e.g., CIES, UKFIET, IAAC, BE[2], Donor Harmonization Group)	Internal capacity for partnership will be reinforced through training and streamlining of the fundraising function across the Institute.	June 2021
		IIEP tools for the formalization of partnerships (e.g. standard partnership agreements), including with regard to copyright and joint publications agreements, will be readily available.	Ongoing
		Multi-stakeholder partnerships that capitalize on local and regional expertise will be promoted as detailed in IIEP's 11th MTS.	July 2021

Recommendations	Management Response	Actions planned	Estimated date of implementation /completion
Recommendation 8: The IIEP should implement a more robust performance assessment framework for its R&D function. The framework should include Specific, Measurable, Achievable, Relevant and Time-bound indicators, baseline values and targets for the different components of its ToC. This framework should be linked to performance frameworks established at the level of individual projects. In order to enhance project-level performance assessment, a more systematic use of satisfaction and follow-up surveys should be performed among activity participants and beneficiaries. The updated performance framework should distinguish between countries who are directly involved and benefiting from IIEP R&D projects (i.e., IIEP direct beneficiaries), vs. those who are not (i.e., rest of the world).	**Accepted and partially implemented** - IIEP wishes to recall that this point of the external evaluation looked at the R&D M&E measures in place during the 9th MTS i.e. the period 2014-2017. The M&E mechanism has evolved during the 10th MTS (2018-2021); and will continue to be strengthened during the forthcoming 11th MTS (2022-2025). - A ToC for the R&D function was designed for IIEP's 9th MTS and further developed at the start of the 10th MTS. The Monitoring, Evaluation and Learning (MEL) Plan of the 11th MTS 2022-2025 will similarly contain IIEP's R&D theory of change which will be updated in the process of drafting the MEL Plan. - As part of the 11th MTS and corresponding MEL Plan drafting process, IIEP has been developing an R&D specific performance assessment framework that comprises "SMART" output and outcome indicators, and has a 2020 baseline and yearly targets over the period 2022-2025. A sub-set of these R&D specific indicators will be used as part of the overall IIEP 11th MTS KPIs framework, thus articulating the performance of the R&D portfolio with IIEP's overall performance. - IIEP is reinforcing its M&E capacities, including through the recruitment of dedicated personnel within the R&D team	KPIs for the 11th MTS have been defined	June 2021
		The R&D monitoring framework will be finalized and adapted to R&D projects under the 11th MTS	January 2022
		A more systematized approach will be developed to monitoring R&D outcomes. This will be done mainly through: (1) mainstreaming in all 11th MTS research proposals and projects, a project-specific M&E framework with outputs and outcome indicators clearly articulated with the overall R&D ToC and the IIEP 11th MTS Value Streams and ToC.	January 2022

Executive Summary

As a UNESCO Category I Institute since 1963, the International Institute for Educational Planning (IIEP) is the sole UN agency dedicated to educational planning and management, offering countries the requisite knowledge and expertise to develop solutions to the challenges arising from their particular context. The institute seeks to contribute to UNESCO'S function as a laboratory of ideas through its research and development function.

The IIEP has commissioned an external evaluation of the effects of its research activities 'on the education sector in partner countries', in the fall of 2020. The evaluation seeks to examine the relevance and influence of IIEP's research across a range of stakeholders, appraise to what extent IIEP's research is being used as evidence in the educational planning process, and outline how IIEP's research and knowledge production is contributing to knowledge generation, enlightenment, and learning among its key constituencies. The findings and recommendations of the evaluation are meant to inform the development of the IIEP's future 11th Mid-Term Strategy (2022-2025).

The evaluation focused on the Research and Development function of the IIEP during the 9th Medium-Term Strategy (2014-2017). Specifically, this included the assessment of the six following research projects representing the bulk of the R&D work conducted during the period:

- Open School Data (conducted by IIEP, Paris)
- School Grants (conducted by IIEP, Paris and Buenos Aires)
- Teachers' Careers (conducted by IIEP, Paris and IIEP Buenos Aires)
- Internal Quality Assurance (conducted by IIEP, Paris)
- National Education Accounts (conducted by IIEP, Paris and Dakar)
- ICT for Education Project (conducted by IIEP Buenos Aires).

The evaluation has been performed on the basis of a theory-based approach. Data collection has taken place via an in-depth desk research, interviews with IIEP stakeholders and beneficiaries, and the development of several IIEP activity in-depth case studies. A total of 52 individuals have participated in interviews carried out as part of the evaluation.

Key findings

Despite the lack of a formal and structured research agenda procedure, the R&D projects conducted under the 9th MTS were very relevant and covered a range of issues considered to be of high importance to educational planning. The work being done by IIEP Research is adding to a body of knowledge in areas where research is lacking, and capacity building is needed. However, there is a need to ensure that better use is made of the knowledge and intelligence in other IIEP departments (linking to the other pillars of activity of the IIEP and wider within UNESCO), the regional offices, and improve the engagement of the Research Advisory Council, thus strengthening existing mechanisms.

Projects have been very successful in the delivery of their activities, and the achievement of their expected outputs and immediate outcomes. There is ample evidence regarding the projects' ability to ensure that their results, and the potential policy implications, reached the eyes and ears of the key policy makers and educational planners, both within MoE as well as other public sector branches (e.g., statistical offices, ministries of finance). It is worth noting that

in many instances, projects also disseminated results and collaborated with other in-country stakeholder groups such as teachers' unions and civil society. Projects used a range of vehicles to disseminate these findings to the circle of stakeholders in direct beneficiary countries which included policy fora, the dissemination of publications, and shorter communication pieces.

While the influence of IIEP's work on the global discussion on educational planning is acknowledged by stakeholders, only a small handful of examples where IIEP research can be directly linked to the taking of a specific policy decision at the country level have been identified. In most cases, IIEP research has influenced policy thinking and understanding, as well as the level of collaboration of different policy agents. Institutional and human capacities of education planners have been improved, particularly in instances where training has been designed and delivered in the framework of the projects. In many cases, IIEP research has also acted as an important 'eye opener' when it comes to key policy trends and the functioning of educational systems.

Yet, this has not necessarily translated into identifiable and tangible policy changes. As such, the assertion that IIEP has effectively contributed to the achievement of its intended final outcomes and impact cannot be made on the basis of the evaluation findings. This said, the types and number of policy changes linked to IIEP research are commensurate to the types of research being conducted, and the level of effort/resources being invested by the institute. Policy changes – particularly in developing context – only tend to happen after several iterations and on the basis of multiple sources of information and evidence, as well as through complementary activities such as dissemination and training. The IIEP by itself cannot be accountable for generating policy change in such complex environments, particularly in light of the relatively modest resources it has to trigger such change.

IIEP's research activities have made an effective contribution of the Africa global priority, and have focused much of their efforts on improving the availability of evidence and the body of knowledge on educational planning in the region. The contribution to the Gender Equality priority however remains much more modest, mainly because of a lack of resources and expertise on the subject.

A number of drivers have contributed to the observed achievements of the R&D function during the period. For instance, there is clear evidence regarding the fact that projects and project goals are context relevant, and that the research is demand driven. Research is also being conducted by highly qualified individuals, in line with international best practices and scientific standards. In the process, research teams have managed to ensure high levels of support, buy-in and involvement by local stakeholders. This has been enabled by the support provided by the two regional offices in Buenos Aires and Dakar. Missed opportunities to further strengthen the impact of the IIEP's research work relate to the lack of stronger involvement of the Research Advisory Council in the promotion of IIEP research quality, as well as to the limited levels of cross pollination between the R&D function and the technical cooperation and training functions of the IIEP.

The issue of financial and organisational sustainability should be at the heart of discussions on the future of the IIEP R&D function. The evaluation has shown that while the overall value for money of the R&D function is high, the high dependence of the function on budgetary resources represents a key threat to its long-terms sustainability, as well as to the goal of developing a more ambitious and impactful R&D agenda. The R&D performance monitoring framework used during the period was found to be poor and failed to capture the true nature of the R&D work and goals.

Recommendations

The IIEP needs to ensure that better use is made of the knowledge and intelligence in other departments outside of R&D, and the Research Advisory Council, in the definition and the roll out of its research agenda. This should be accompanied by measures to enhance cross-pollination between the work conducted by the R&D function and the training and technical cooperation functions, in light of further influencing policy decisions, changes and capacities at the country level.

The IIEP needs to better plan and implement a multi-model communication approach (from the beginning of the research) to satisfy a wider range of audiences and make the research findings more actionable. Although the research reports, case studies and policy briefs are the most important outputs of the research, in order to better reach a wider non-project beneficiary audience, the recent work on audience segmentation, coupled with the data on use of the current media mix should be used to inform the next communication strategy. This will allow the IIEP to tailor its communications approach using a diverse set of tools and channels for delivery, which is much more targeted.

Finally, the IIEP needs to develop avenues to diversify funding sources and enhance financial sustainability of the R&D function. Part of the solution to this challenge may be in the enhancement of its partnering approach. Proactively seeking new partners may allow the IIEP to increasing access to funding, increasing access to research capability and increasing knowledge on emerging research themes.

1   Introduction

The following report contains the findings and recommendations of the external evaluation of the UNESCO International Institute for Educational Planning's (IIEP) R&D function during the 9th MTS. The document represents the third and final formal deliverable produced under this assignment by the evaluation team. This document has undergone a review on behalf of the members of the evaluation reference group, and has been discussed with the group as well as other members of the IIEP team during a presentation of the draft final report (16th of March, 2021). Written comments provided by IIEP have been incorporated into this final report. The evaluation was launched in December 2020.

1.1   Purpose, scope and methodology of the evaluation

The IIEP has commissioned an external 'Evaluation of the effects of the International Institute for Educational Planning (IIEP) research activities on the education sector in partner countries' in the fall of 2020. The evaluation seeks to measure the effects of IIEP's research activities on the education sector (including the broad range of relevant stakeholders) in beneficiary countries and regions. Specifically, the evaluation was designed to:

- Examine the relevance and influence of IIEP's research across a range of stakeholders
- Appraise to what extent IIEP's research is being used as evidence in the educational planning process
- Outline how IIEP's research and knowledge production is contributing to:
  - Knowledge generation and enlightenment
  - Learning
  - Evidence used for policy discussions and decisions

The retrospective nature of the evaluation meant that an assessment of the extent to which specific goals of the IIEP research function, as specified in its 'Research & Development (R&D) theory of change', were met; and required a collection of evidence of what has changed and the factors that hinder or facilitate the changes. In light of achieving this goal, the evaluation exercise conducted an in-depth assessment of IIEP's research activities from several different angles: relevance, effectiveness, impact, efficiency, and coherence. These criteria have been used to structure and define the main evaluation questions addressed as part of the exercise (see Appendix for the evaluation matrix).

The prospective nature of the evaluation implied that it would also seek to provide insight into possible improvements for the future of IIEP's research function, and notably to help inform the development of the 11th MTS (2022-2025) which is currently underway. The evaluation has therefore identified lessons in the area of planning, implementation and dissemination of research that could assist IIEP in decision-making. The evaluation also seeks to introduce evidence-based future-oriented recommendations.

There are several audiences and user groups for the evaluation and its results. The primary users of this evaluation are IIEP management and staff for strategic and planning purposes. Other audiences include the IIEP Governing Board as well as IIEP partners.

At the outset of the evaluation, it has been agreed with the evaluation steering committee that the evaluation and the analysis to be performed would cover the overall research

program of the 9th Medium-Term Strategy (2014-2017). Specifically, this included the six following research projects[1]:

- Open School Data (conducted by IIEP, Paris)
- School Grants (conducted by IIEP, Paris and Buenos Aires)
- Teachers' Careers (conducted by IIEP, Paris and IIEP Buenos Aires)
- Internal Quality Assurance (conducted by IIEP, Paris)
- National Education Accounts (conducted by IIEP, Paris and Dakar)
- ICT for Education (conducted by IIEP Buenos Aires).

A full description and overview of these projects is presented in the Appendix of this report.

The evaluation has been performed on the basis of a theory-based approach, guided by the review of a clear Theory of Change which has been tested and assessed throughout the evaluation. Specific data analysis and collection tools have been designed for this purpose, as well as for the purpose of collecting the necessary evidence to address the evaluation questions identified by IIEP. These mainly included an extensive literature review of IIEP internal documents (e.g., Governing Board reports, project planning documentation) and research products, interviews with IIEP stakeholders and staff, interviews with R&D project beneficiaries, and the development of several R&D activity case studies. Overall a total of 52 individuals have participated in interviews carried out as part of the evaluation. A detailed list of the people interviewed as part of the evaluation can be found in the Appendix of this report. The Appendix also contains the final case studies which have fed into the overall analysis contained in the body of the report.

The evaluation team did not encounter any significant challenges in the delivery of the evaluation methodology, and the great majority of the work was performed as originally planned. Some of the difficulties faced included the identification of interviewees given the significant time lag and the fact that many of them had moved-on from the positions they held at the time of their collaboration with IIEP, difficulties in contacting some key stakeholders, and the lack of centralised data on IIEP R&D human and financial inputs during the 9th MTS. The members of the IIEP Governing Board were not contacted for the purpose of the evaluation as originally foreseen, as priority was given to interviewing IIEP project beneficiaries. Overall, the evaluation team considers the quality and quantity of data collected to be adequate to the performance of the evaluation and the addressing of the evaluation questions.

1.2   Description of IIEP's Research & Development activities under the 9th MTS

Research is a fundamental aspect of IIEP activities. As a UNESCO Category I Institute since 1963, IIEP contributes to UNESCO'S function as a laboratory of ideas through its research programme, one of its three work pillars. It is the sole UN agency dedicated to educational planning and management, offering countries the requisite knowledge and expertise to develop solutions to the challenges arising from their particular context. Historically, its research agenda serves multiple purposes:

- Learn from practice in training and technical operations
- Contribute to a repository of knowledge on educational planning topics

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[1] The official titles of these projects can be found in Table 1.

- Support /inform policymakers

- To a lesser extent, strengthen research capacities of stakeholders

IIEP's research portfolio distinguishes itself from other institutions that engage in fundamental and theoretical research. It is hands-on, fast-evolving, and adapts itself to latest debates at international, regional and country level. IIEP focuses on applied research that concentrates on questions of paramount importance to educational systems by providing comparable evidence from different contexts, mostly through cross-country studies.

The bulk of the IIEP's research programme is conducted in Paris although the Buenos Aires and Dakar offices have also been involved in research activities during the 9th MTS period. Four of the analysed research projects were mainly funded by IIEP's regular budget, while two others were largely externally funded.

In 2012, the IIEP commissioned a first evaluation of its research work. Some very positive elements emerged from this evaluation: the IIEP's research topics were deemed relevant, well-designed and coherent, adapted to country contexts, enabling of local participation, respectful of country ownership in research implementation, and inclusive of MoEs.

The first traceable results on capacity development and policy results were considered encouraging but relatively limited. The evaluation found that IIEP had only to a limited extent, led to actual improved research capacities at the national levels. Resources available for research were spread thinly on a relatively large volume of research projects, which bears the risk of fragmentation of IIEP's research agenda. Besides, IIEP's research was hampered by the lack of country-level dissemination strategies. The evaluation also pointed out the need for establishing more strategic synergies between its research, technical assistance and training work.

The evaluation issued several recommendations to boost successful outcomes of the different research projects. To further increase strategic engagement and advocacy, it was recommended that IIEP includes a more bottom-up approach to generating research topics; develops longer-term relationships with partner institutions; and further explores opportunities for strategic synergies between research, training and technical cooperation.

In terms of its relationship with partnerships and networks, it was recommended that IIEP strengthens its partnerships by working in fewer contexts, but longer-term engagements; enhances its capacity development policy linking it to its research activities; and seeks new partnerships to attract research capital and for advocacy.

Regarding its dissemination strategy, the evaluation recommended that IIEP should design a clear and carefully thought-through strategy for dissemination and policy influence, involving 'parent' ministries in its design and implementation. IIEP should reinforce its communication and dissemination strategy by:

- including dissemination as part of the research process

- intensifying IIEP's engagement in the dissemination phase

- disseminating research findings primarily to local stakeholders

- reducing the time lag between the completion of the research and the publication/dissemination of results, and

- budgeting the translation of IIEP research findings into the local language.

The extent to which these recommendations have been successfully integrated into IIEP's research function since 2012 will be investigated in the present evaluation.

In its Mid-Term Strategy (MTS), research appears as a transversal underlying strategic element across several thematic priorities. Three topics are at the forefront of the research programme: reducing gender inequalities, improving Teacher careers and working conditions, and improving governance accountability. Exploratory work was also foreseen on youth transition to work and developing a foresight research agenda.

More specifically, the following research topics are mentioned in the strategic document: policy research to reduce gender inequality (mentioned in Thematic Priority 1), research on appropriate policies and management of teachers' careers and work (Thematic Priority 2), research attention for decentralised practice for education financial resource allocation and use, research for governance reform (Thematic Priority 3), mainstreaming conflict and disaster risk reduction measures into education policy planning (Thematic Priority 4).

The IIEP in Action progress reports highlights several significant changes introduced over the period. Over the 2014-2015 biennium, IIEP created a Research Advisory Council to advance the quality of its research work. A comprehensive communication approach was developed involving websites, thematic portals, multiple publication formats, and social media to support the dissemination of the knowledge created over the biennium.[2]

Box 1 The Research Advisory Council of IIEP

The Research Advisory Council (RAC) was established in 2015 following the dissolution of the Council of Consultant Fellows. Its general objective is to guide the IIEP in the development of its research work. It provides guidance to the Institute on specific research topics as well on improving IIEP's research procedures, such as peer review and dissemination

Initially, the main foreseen tasks of the RAC were to; (i) provide advice to IIEP's Director on the Institute's foresight and research programmes; (ii) appraise specific research projects; (iii) help the Institute develop a more pro-active fundraising strategy in the area of research; and (iv) attract young researchers, in particular PhD and post-doctoral students, to contribute to IIEP's research efforts.

The Council is composed of the world's most distinguished and creative contributors to knowledge in the field of educational planning and management. The group meets on average twice a year and is composed of seven persons.

Source: based on information collected in Governing Board meeting notes.

According to the Terms of Reference of the evaluation, nine research projects were launched in the framework of the 9th MTS.[3] The majority of these projects built on work which had been conducted under previous MTS. Six of these projects which represent the core of R&D activities performed during this period have been selected to be the focus of this evaluation. A synthesis of these six projects is provided in the following table. A more detailed description can be found in the table presented in the Appendix. It is worth mentioning that for practical purposes, the body of this report often refers to the short versions of the project titles, which have been listed in brackets in the following table.

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[2] Report by the Governing Board of the IIEP on the activities of the Institute for 2014-2015

[3] Terms of Reference (2020)

Table 1 Overview of the selected R&D projects analysed as part of this evaluation

Project Title	Overview of project
Education financing: Improving national reporting systems on financial flows (National Education Accounts)	Launched in September of 2013 by the UNESCO Institute for Statistics and IIEP Pôle de Dakar, the NEA is an information system that produces transparent data on education spending from all sources (government, household, or external funding). The data is used in order to identify gaps in education funding and redirect resources to meet policy objectives. The objective of the NEA is to analyse who finances education, how much is spent, where do funds go, what these funds are being spent on. NEAs can therefore offer evidence on whether resources are allocated equitably and effectively within education systems.
Improving school financing: the use and usefulness of school grants (School Gants)	Since 2010, IIEP has been coordinating a comprehensive research programme on the use and usefulness of grants to schools. Several previous literature reviews, case studies and research briefs have been conducted on this type of policy by the IIEP and its partners. Under the 9th MTS the research was extended to two new regions, Latin America and the Caribbean and Francophone Africa. The aim was to deepen the research findings and learn from the experiences of other countries in the design and implementation of school grant policies.
Exploring the organisation and management of Teacher careers (Teacher Careers)	Launched in 2015, this research project provides policy makers and governments with a variety of policy options with regards to the organization and management of teacher careers. It examines different types of teacher career models, management implications and perceived effects on teacher motivation, attraction and retention. Teacher career reforms were investigated in varied contexts including Colombia, Ethiopia, Ecuador, Lithuania, Mexico, New York City, Peru, Scotland, the Western Cape in South Africa and Thailand.
Using Open School Data to improve transparency and accountability in education. (Open School Data)	This project sought to compare the motivations, purposes, audiences, data sources, content, uses, and impacts of school report cards developed in different regions of the world. The research addressed the necessary conditions for enabling open education data to promote transparency and accountability in education. The results of this work helped build the capacities of education officials, as well as civil society representatives in charge of the management of school data, to develop access to practical, effective, and usable open data in education.
Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness? (Internal Quality Asurance)	Within the context of an international reform movement to set up internal quality assurance mechanism in HEIs, the goal of the research was to generate knowledge in order to provide evidence–based policy advice to national and institutional higher education leaders on existing innovative and cost-effective solutions for IQA systems in universities. The research comprised an international survey on existing practices and eight university case studies to demonstrate good IQA practices and analyze their effectiveness. The project also covered the organization of several national forums and an international policy forum to disseminate the findings among policy-makers. The generated knowledge was used to develop an online course on IQA.
Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires) (ICT for Education)	Since Information and Communication Technology (ICT) tools have changed the way we interact, the goal of this program was to increase digital literacy (searching, discerning, and producing information). The aim was to develop this digital literacy for both teachers (accessing online resources, individualised teaching, fostering student interaction), and for students (experiment with different styles of learning, inclusiveness, This program was initiated by the IIEP Buenos Aires office and tested in the period 2014-2017 in 4 pilot countries: Costa, Rica, Colombia, Uruguay, and Peru. Each country had

Project Title	Overview of project
	a customised program, but similar activities remained: laptops for students, online classes, internet access.
	There were three main supporting documents for this program: a country report of each program, a comparative study between the four countries (*Revisión Comparativa de Iniciativas Nacionales de Aprendizaje Móvil)* and a conference (August 2016) bringing together main stakeholders.

The IIEP's R&D activities were delivered on the basis of strategic priorities and goals established in the 9th MTS. The MTS included a general Theory of Change for the IIEP as a whole, including a specific component relating to 'knowledge generation' activities, which are directly linked to R&D activities. This ToC was however relatively high-level and did not include many specifics on the intended impact pathways for the 'knowledge generation' line of IIEP work. As such, for the purpose of this evaluation, the evaluation team has developed a more detailed and tailored Theory of Change for the R&D work performed by IIEP during the 2014-2017 period. This ToC builds on the ToC developed as part of the 9th MST, while seeking to capture in a more structured and formal manner the intended results and underpinning factors of this work. It's worth highlighting that this ToC has been developed after the delivery of the MTS, and as such, it may be influenced by the existing hindsight vision that stakeholders now have of the work performed during that period. The ToC has been developed on the basis of the findings drawn from the literature review as well as interactions with IIEP stakeholders throughout the evaluation. This included the organisation of a Theory of Change workshop conducted with members of the Evaluation Steering committee in December 2020. The evaluation team has used IIEP's R&D theory of change to systematically collect evidence of what has changed (outcomes) and determine whether and how IIEP's research approach has contributed to the identified changes.

Figure 1 Reconstructed Theory of Change of the IIEP research and development function

OUTPUTS

KNOWLEDGE PRODUCTS e.g. publications, research studies, on-line news, briefs, on-line thematic portals

DEVELOPMENT PRODUCTS e.g guidelines, toolkits

Training programmes

Policy dialogue events

IMMEDIATE OUTCOMES

Educational planners and managers in Ministries of Education become exposed to new knowledge and evidence on education planning and management

Policy makers become exposed to new knowledge and evidence on education planning

Other education stakeholders

Perceptions and behaviour of civil society stakeholders (e.g. education institutions, employers) changes in light of IIEP generated knowledge

Other public sector stakeholders (e.g. ministries) modify their practices relating to educational planning

International organisations

IIEP knowledge influences the global discussion on educational planning and is integrated into intal organisations' work

FINAL OUTCOMES

Improved human and institutional capacities for education planning and management

Evidence generated by IIEP research is used for policy decisions (incl. regulation)

Improved governance and accountability of educational

Introduction of gender-conscious practices and policies

Improved teacher career structures and management

Improved school financing schemes

Increased use of open data for education system management

Implementation of higher education quality assurance

Increased use of ICT in education

IMPACT

Strong and resilient education systems (HR, financing, policies)

Improved access to inclusive and equitable quality education and lifelong learning opportunities for all (SDG 4)

Pre-conditions and supporting factors

Research projects / goals are context relevant
Research is demand driven
Research focuses on emerging issues for target countries
Alignment of research agenda with UNESCO strategic priorities
Research is conducted according to international scientific standards
Strong communication and dissemination support
IIEP research outputs are taken up by local researcher communities
Availability of financial resources for the delivery of new education agendas
Research Advisory Council promotes quality of IIEP research
IIEP taps into existing networks (e.g. research) to source information and disseminate results
Political support and buy-in locally for IIEP R&D
Existence of policy reform ambitions within MS

Crises in Member States
Absence of research team members or turnover

1.3 Financing of IIEP research activities and Human Resources

IIEP's finances and budget are approved annually by the Governing Board. The Regular Programme's (RP) income is composed of UNESCO's financial allocation, voluntary contributions or Core funding from Governments and other income which originates mainly from staff costs recovery from extrabudgetary projects as well as from revenues from the training programme, sales from publications, various reimbursements and other sources. IIEP also relies on extrabudgetary income (ER), or earmarked funding for projects.

According to the reports at our disposal:

- The financial resources of the IIEP were $18,7M USD and $16,9M USD in 2016 and 2017 respectively. Extra-budgetary funds for the year 2016 represented 49% of total income, compared to 51% of the regular programme. In 2017, the Extrabudgetary funding accounted for 43% of the total income versus 57% for the Regular Programme.

- On the expenditure side, roughly 85% of the funds were used for programme activities and 15% for administration, the Directorate and Governing Board both years.

The financial information for R&D projects under the 9th MTS is fragmented and incomplete. Based on the information provided by IIEP and the information drawn from the desk research, the team was able to assemble some high-level figures on the resources which were invested into implementing the research agenda. It should be noted that these figures include a breakdown of budget per activity. Associated staff costs were not included, except for external consultants.

As concerns specific funding allocated to the R&D project activities, core funding from IIEP was roughly equal for the Teacher careers, Open data and IQA projects. The School Grants[4] and the NEA project received important grants from the GPE (i.e., extrabudgetary) as well as multiple UNICEF agreements. The NEA project secured a 1,5M$ grant from the GPE, with 800K$ for the IIEP. It is also worth mentioning that an important volume of in-kind contributions were provided by local project partners. The exact figures are however not available.

Figure 2 Allocation of funding for IIEP project activities (Paris office)*

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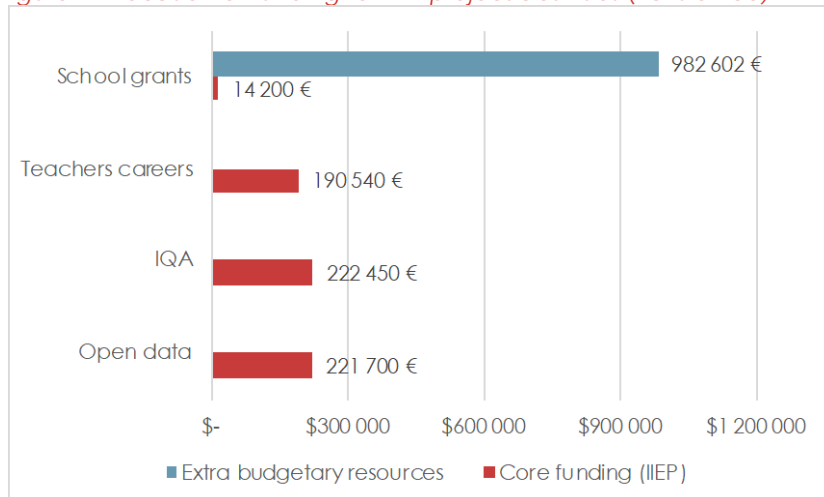
[4] School Grants research spanned two MTSs.

The following figures illustrate the allocation of funding per type of activity in the framework of individual projects (based on available data)[5]. Budgetary allocations per activity type for the NEA and Aprendizaje mobil projects are not available.

Figure 3 Distribution of funding for the Teacher careers project (Paris office)
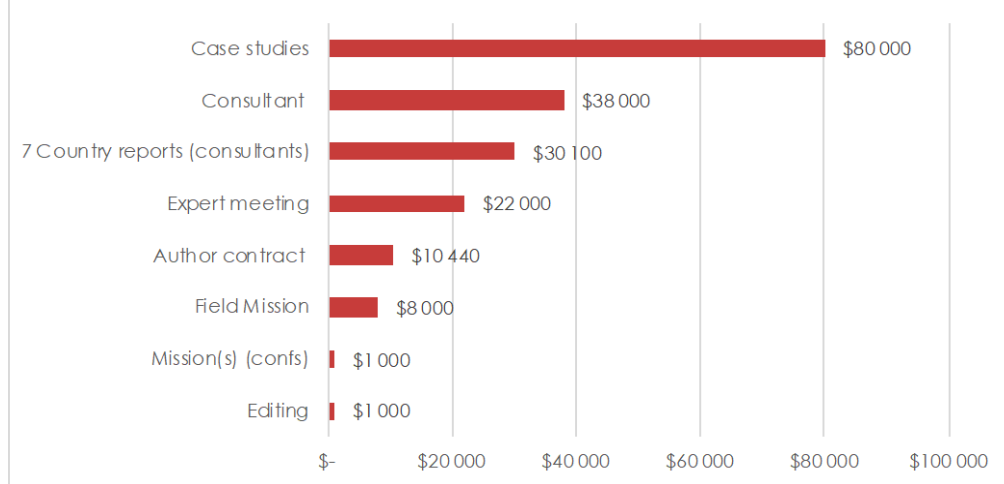
Source: IIEP (2021).

Figure 4 Distribution of funding for the IQA project (Paris office)
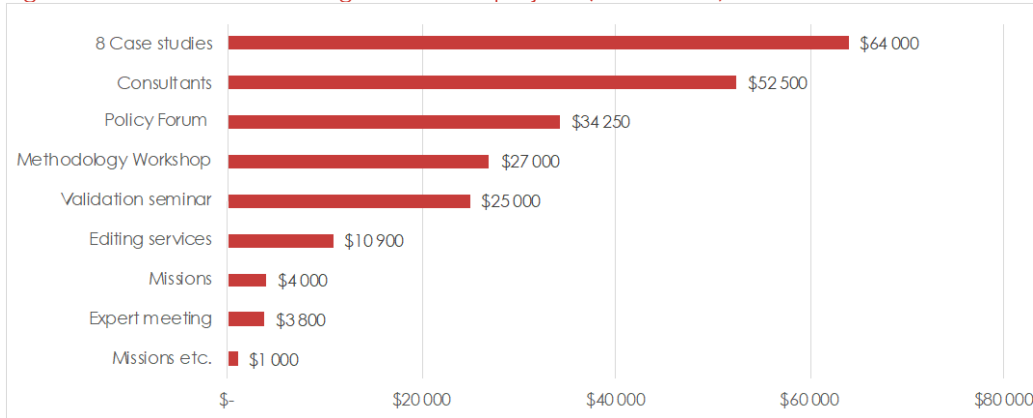
Source: IIEP (2021).

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[5] These figures, provided by IIEP, are estimates based on a variety of sources (SAP, DUO, project records). They are not verified with IIEP's financial statements.

Figure 5 Distribution of funding for the Open Data project (Paris office)

Regional 'State of the art' paper	$15 000
Case studies	$90 000
Study visit	$76 500
Policy Forum	$17 100
Other (editing, translation, missions	$12 000
Author contract	$8 000
Consultant	$3 100

Source: IIEP (2021).

As concerns Human Resources working on IIEP projects, all four projects overseen by the Paris office involved similar profiles and levels of implication of staff. The majority of staff working on each project, besides the project lead or project manager, was either part time on each project, or only worked for a few months. It is worth highlighting that project managers worked only part time on their research projects, as they were also involved in teaching and technical cooperation activities. Given that under the 9th MTS the IIEP did not measure the share of time allocated to different activities, it is impossible to establish how much time was allocated precisely by project managers to their R&D-related work. All staff also have other tasks not directly related to their projects (e.g., TC or training). There was generally one senior and one junior member of staff working on a project (sometimes shared between two projects), and one assistant (shared between two projects). The projects mobilised a majority of senior-level staff.

- In the case of the Open Data project, one project manager was mobilised over the course of the entire MTS9. One associate was mobilised in 2016. One assistant was mobilised prior to September 2015 and another after. Consultants were involved from March to December 2015.

- As concerns the IQA project, one project manager was mobilised over the course of the entire MTS9. One assistant was present before September 2015 and replaced by another after September 2015. Consultants were involved in 2015 and 2016, as well as one specifically for 6 months in 2017.

- For the Teacher careers project, one project manager and one assistant were mobilised over the course of the entire MTS9. One associate was involved over the course of the years 2015-2017. An associate and a consultant worked on the project for a five-month period.

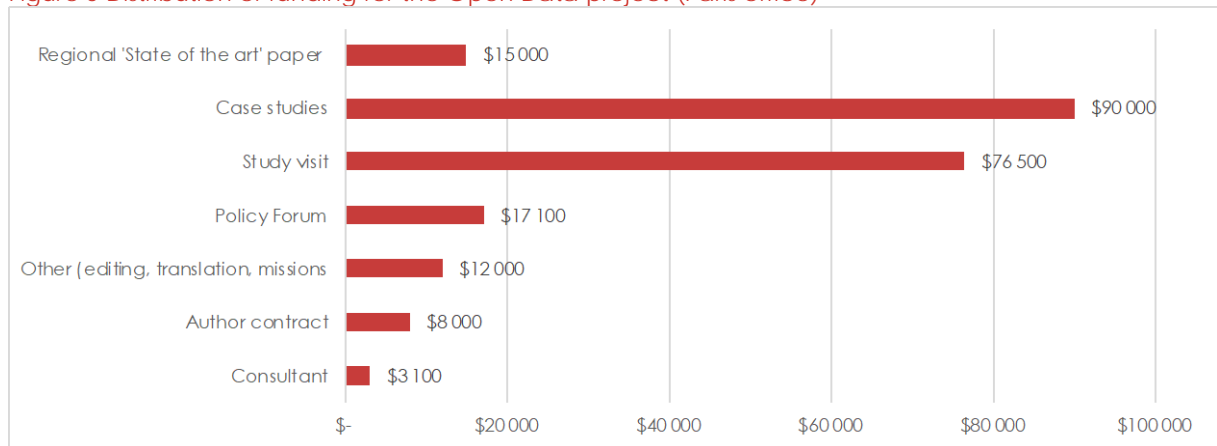- The School Grants project mobilised one project manager from 2014-2015. One associate was involved from 2015-2017. Two consultants worked on the project, one for 7 months and the other for 4.5 months. The assistant worked on the project for the entire duration of the MTS9.

2   Relevance of the IIEPs R&D activities

The evaluation has explored the extent to which IIEP's R&D projects and activities under the 9th MTS are in line with the needs of its beneficiaries (i.e., countries and regions). A particular emphasis has been set in the evaluation questions on the process through which the research

content has been selected and agreed upon. As such, this is the first issue analysed in this chapter of the report.

2.1 The process for the definition of the IIEP research agenda

There are several important components which were evident in the process of agenda setting for IIEP research under the 9th MTS. Although there is no formal needs assessment per se, the expert knowledge in the IIEP research team fed significantly into the shaping of the research agenda. The interviews with staff show how they use their own expertise, conclusions and recommendations from previous work, networks (links with field workers and national stakeholders) and other research to feed into the decision-making process for the shape of the research agenda.

Another important influence on the definition of the research agenda was other pillars, in particular Technical Cooperation and Training parts of IIEP. However, during the 9th MTS, this was weakened by the organisational structure of the IIEP which made it more difficult to cross fertilise between Research and the other teams (i.e., technical cooperation and training). According to some interviewees, despite the active participation of R&D team members in the activities of the other IIEP pillars, formal cross-fertilisation appeared to weaken throughout the 9th MTS. This issue is further explained in section 4.2 of the report.

For the involvement of the regional offices, only Buenos Aires was in operation pre 9th MTS, therefore Dakar was still going through an adjustment phase with regard to its contribution to the research agenda. As highlighted in section 3.3.6 on the support of the regional offices, there was more potential to coordinate at the programming level and to feed into planning (and therefore agenda setting).

As part of the evaluation, members of the Research Advisory Council were consulted on their views of the IIEP and their role in ensuring the quality of the research work done by the IIEP (the RAC was not constituted until after the 9th MTS so they did not play a role in defining the research agenda). Overall, the Research Advisory Committee was seen as an important, but possibly underused structure in relation to the research agenda. There was no doubt expressed by RAC members on the quality of the research which is undertaken by IIEP and endorsement from the members on the importance of the research in the international landscape. The view was that the research was relevant, but that selection was constrained by the resource capacity. The Advisory Council had also previously discussed the need for longer term planning.

The process of agenda setting, although qualified through the interview programme as leading to relevant research priorities, could therefore have made further use of additional available mechanisms for intelligence gathering and decision making. One of the conditions set out in the ToC for the shaping of the research agenda is for it to be demand driven. This aspect could be strengthened. The research team had a set of competences which heavily influenced the direction. Hence some of the mechanisms for gathering intelligence could have led to self-affirmation of the direction of the agenda and were led by historical interests.

A more rigorous piece of work could be undertaken in order to seek information on priorities from across the globe, however the funding for IIEP Research is small and the research can only cover a finite number of areas. From the deep dives into the research projects, there is good evidence to show that the work being done by IIEP Research is adding to a body of knowledge in areas where research is lacking, and capacity building is needed. In addition, evidence shows that IIEP researchers did source many ideas for research topics from their local individual networks. The most important recommendation is to ensure that better use is made of the knowledge and intelligence in other departments (linking to the other pillars of activity of the

IIEP and wider within UNESCO), the regional offices, and improve the engagement of the Research Advisory Council, thus strengthening existing mechanisms.

2.2 The relevance of the research agenda under the 9th MTS

Relevance can be defined as the extent to which project goals are aligned or respond to existing policy needs or challenges faced by intended beneficiary groups. The analysis of individual projects and project activities (see activity case studies in the Appendix) shows that R&D projects and their related objectives are highly relevant. The goals of the projects can be directly tied to the existence of a particular educational planning need or policy challenge. The links between project goals, rationale, and policy challenges and needs are well explained and articulated in project deliverables, as well as by the project managers themselves.[6] In addition, project partners and beneficiaries also highlighted the relevance of the specific projects they were involved in. The following table briefly summarised the appraisal of individual project relevance.

Table 2 Overview of assessment of relevance of each R&D project analysed by the evaluation

Project Title	Overview of project
Education financing: Improving national reporting systems on financial flows	The project was deemed **very relevant** by interviewed beneficiaries. The NEA methodology ultimately provided data and proof of education financing, and therefore **exposed expenditures that were before-then invisible to education planners**. From the beneficiaries' perspective, both their participation in the program and the publication of results allowed stakeholders to have a very clear vision of education financing mechanisms. The **NEA tool facilitated the process of resource planification**. This, in turn, pushed governments to reconsider education expenditures for education policy planning.
Improving school financing: the use and usefulness of school grants	The project subject was considered both **very timely and relevant** overall by interviewed beneficiaries. Indeed, at the time of the project, **almost all African and Latin American countries had ongoing reforms** related to their school financing systems. This research project was an **opportunity for countries to review their reform results and to compare themselves with neighbouring countries**. It was well aligned with other research priorities of bigger players such as UNICEF and GPE who are focusing on such topics of financial decentralisation.
Exploring the organisation and management of Teacher careers	The research topic was considered **very relevant** by interviewed organisations. Serious questions related to Teacher careers had started to be explored at the start of the project, but there was little available research on the topic. A number of countries had reformed their teacher career structures and others planned to introduce changes in the near future. Teacher career reforms were and still are high on the agenda of many governments. The potential to learn from other countries, combined with the need to address a research gap, prompted IIEP to launch the project. The **positioning of the IIEP was rather unique** on the subject as most literature focused on merit-based pay but not a lot on teacher career as a whole and motivation. It was difficult to find detailed documentation about existing teacher career policies at the country-level, so the project really set out to **fill a gap in the literature** by demonstrating innovative systems and policies in place for reform.
Using Open School Data to improve transparency and	The research topic was considered **very relevant** by interviewed organisations. IIEP has been working on the issue of ethics and corruption in education for over 20 years and is a very relevant source on the topic. As such, the IIEP sought to capitalize on the

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[6] All individual project managers or project representatives were interviewed for the purpose of this evaluation.

Project Title	Overview of project
accountability in education.	previous knowledge gained under IIEP's research on ethics and corruption in education which pointed to the importance of providing public access to information in order to reduce corruption in the system. The identified knowledge gap to be filled related to "understand(ing) the conditions for success and meaning" and "how the information used will benefit the system". In Asia, Ministries of Education in India, Indonesia and Bangladesh have started to share information with citizens and to consider the use of open data in education. The project addressed **a need to document what was already being done**, understand the conditions for success and meaning for people, and of how the information used will benefit the system.
Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness?	The research topic was considered **very relevant** by interviewed organisations. The External quality assurance has been high on the agenda globally since the early 2000's. In order to **respond to the preoccupation of UNESCO Member States with the enhancement of the quality of higher education**, the IIEP had invested efforts in the area of external quality assurance in higher education for several years now. When the IIEP started to work on the topic of internal quality assurance, a reform movement had already started in a number of countries. The research on IQA was designed to take stock of good practices, but also assess their effectiveness, to be in a position to provide evidence-based policy advice on effective IQA systems. The IIEP focused on a policy area that was not covered much in international research
Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires)	The research was deemed **very relevant** by interviewed organisations. By conducting an overview of country initiatives over a whole continent, the IIEP had enriched the research showing the **potential ICT had in education**. The relevance of the research was often described as raising awareness. Indeed, since ICT in education was a relatively novel concept, certain stakeholders were doubtful of the promise (described as a *distracting effect*). Nonetheless, this research project **contributed to the idea of a "need for connectivity" as a tool to improve education outcomes** such as equity and access, test scores, teacher involvement, student creativity etc.

The evaluation also explored the degree of 'geographical relevance' of IIEP's research activities. In other words, we analysed the extent to which the geographical targeting strategy of the projects responded to any specific rationale of institutional strategic ambition. As was the case with the 'thematic' relevance, 'geographical' relevance of IIEP activities is high. A specific geographical targeting strategy was implemented in the framework of each individual project, in light of identifying the most appropriate countries/regions to conduct research (both in and for). Project documents and project leaders were able to adequately explain the rationale behind the selection of target countries and regions. This of course is not a simple exercise, since IIEP R&D teams must take into account not only the importance of country/region needs and challenges in their choice of targets, but also the preferences of donors, the existence of interest and buy-in for projects by local stakeholders, and the existence of adequate policy conditions to conduct research activities and potentially implement new policy solutions stemming from the results of research.

IIEP followed a strong 'geographical' targeting strategy focusing on African countries. This is illustrated by the importance of Africa in the overall portfolio of projects and activities implemented during this period (see section 3.2.4). The specific focus on 'fragile' territories is

less pronounced in the R&D work[7], despite the fact that these regions and countries are specifically targeted in the 9th MTS as well as in high level UNESCO strategic documents[8]. This is linked to the thematic coverage of the R&D research portfolio presented in the following sub-section, which reveals that IIEP did not actively seek to tackle the 'Resilience of education systems through crisis- sensitive planning' thematic priority of its MTS through its R&D activities. This said, projects funded by the GPE such as the School Grants projects did focus on GPE priority countries and fragile states.

2.3   The alignment of R&D project results with IIEP R&D research priorities

In order to assess the degree of alignment between the portfolio of R&D[9] projects implemented during the 9th MTS, and the strategic priorities established by the IIEP for this period, one must turn to the content of the 9th MTS itself. The 9th MTS establishes four thematic priorities to be targeted by all activities implemented by the IIEP during the period:

- Reduced social inequalities, particularly gender inequality
- Improved cognitive and non-cognitive learning outcomes
- Governance and accountability for transparency and participatory planning
- Resilience of education systems through crisis- sensitive planning

In hindsight, R&D projects implemented during the period are fully in line with these thematic priorities. All of the projects analysed in the framework of this evaluation, which represent the bulk of the R&D work conducted by the IIEP during this period, can be directly linked to one of these four thematic areas. The following table illustrates the links between the thematic areas and the goals set / topics addressed by each of the six projects.

Table 3 Linking the 9th MTS R&D projects to 9th MTS thematic objectives

9th MTS thematic area	R&D projects implemented under the 9th MTS
Reduced social inequalities, particularly gender inequality	• Improving national reporting systems on financing flows • Improving school financing: the use and usefulness of school grants • Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires)
Improved cognitive and non-cognitive learning outcomes	• Exploring the organisation and management of Teacher careers
Governance and accountability for transparency and participatory planning	• Education financing: Improving national reporting systems on financial flows • Improving school financing: the use and usefulness of school grants • Using Open School Data to improve transparency and accountability in education

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[7] The other IIEP pillars did focus more heavily on these territories under the 9th MTS, and so did the R&D function under the 10th.

[8] One exception to this are the NEA and School Grants projects which received funding from the GPE, which focuses specifically on fragile states.

[9] The 9th MTS qualifies R&D activities as 'Knowledge Generation'

9th MTS thematic area	R&D projects implemented under the 9th MTS
	• Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness?
Resilience of education systems through crisis- sensitive planning	• N/A

However, as illustrated by the previous table, there was a strong concentration of activities and work around two of the four thematic areas of the IIEP (i.e., Improved cognitive and non-cognitive learning outcomes & governance and accountability for transparency and participatory planning); while two of the areas went mostly uncovered from an R&D perspective (i.e., resilience of education systems through crisis- sensitive planning & reduced social inequalities, particularly gender inequality). Regarding the 'reduced social inequalities' theme, the 9th MTS does mention that IIEP had in the past conducted policy research on gender equality in learning achievement and educational leadership upon which is would seek to build further work – under the 9th MTS – in order to support the interpretation and use of gender-relevant data and evidence, including learning achievement, to guide policy and programme design at country level. However, this IIEP ambition did not appear to come to fruition in practice given the composition of the project portfolio. This said, three of the projects included in the table did address issues of social equity, although this was not at the heart of the projects.

One of the projects analysed as part of this evaluation – *Iniciativas Nacionales de Aprendizaje Móvil en América Latina* (Buenos Aires, i.e., ICT in education) – does not appear to be directly linked to any of the thematic priorities of the 9th MTS. This is not to say that the project was not relevant in absolute terms. However, it is not in the first instance, directly addressing any of the top-level priorities established by the IIEP in the framework of its mid-term strategy. This said, the ICT in education project potentially[10] represents one of the few instances in which the R&D function was used as a platform to perform foresight on emerging issues and their interactions for education policy.

It is worth noting that the IIEP 9th MTS explicitly states that the 'IIEP's research programme will be a mix of analyses to capture lessons for policy and practice and an exploration of areas of critical importance'. The first category will be analyses to assist planners and policy-makers to improve learning outcomes, reduce gender inequalities, improve Teacher careers and working conditions, and improve governance and accountability. Exploratory work will be done on youth transition to work and developing a foresight research agenda'. In practice, and based on the assessment of the R&D project portfolio, the focus of IIEP R&D activities under the 9th MTS are heavily skewed towards the former, with the latter playing a relatively marginal role. The issue of youth transition to work was not addressed by the projects analysed by this evaluation. The reasons leading to this thematic distribution of the 9th MTS R&D project portfolio are not entirely clear. From the evaluation team's perspective, this could stem from the lack of a more pro-active steer from IIEP management to drive the development of a foresight research

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[10] We use the term potentially since the ICT for education project was not formally described to the evaluation team as a research foresight project. However, given the content of the project, it could be considered as a project focusing on exploring an emerging issue in education.

agenda. This may also be linked to a natural tendency to focus on issues which had been explored through R&D under previous MTS (i.e., path dependency). According to one IIEP representative, the choice of thematic focus is also determined in part by the sources of external financing.

This said, it is worth highlighting that IIEP did conduct some foresight work during this period, albeit outside of the framework of the projects analysed as part of this evaluation. These included:

- Three foresight papers were published or commissioned during this period[11]
- IIEP has traditionally organised strategic debates as part of R&Ds foresight function, whereby it invites experts to come and debate around a variety of issues relevant to education policy makers. Between 3 and 5 debates take place every year.

In addition, the portfolio of projects analysed as part of this evaluation were also designed to be forward looking, and to address research and knowledge gaps.

Given the existence of limited resources, and the desire to concentrate its work around a smaller set of research projects, the IIEP R&D team has had to make choices regarding the overall composition of its research portfolio. This applies not only to the thematic coverage of the portfolio (i.e., the IIEP is not in a position to conduct research on every issue related to educational planning), or to the geographic coverage of the projects; but also to the focus of the research in terms of its more basic or applied nature. In other words, the IIEP has had to address the trade-off between conducting research which is more exploratory in nature and perhaps has less direct implications on policy-making in the short term, vs. conducting more applied research directly linked to the development of policy solutions and short-term action taking on behalf of beneficiary stakeholders. Striking the right balance between all of these dimensions is not straightforward, and there are differing views within and outside the IIEP[12] with regard to how IIEP R&D work should be positioned within these different spectrums. There is no obvious choice or recommendation to make in this regard, and this decision should be made through internal reflection process with key stakeholders. To the extent possible, this decision should be made on the basis of existing evidence and/or needs assessments and should be clearly articulated in the IIEP MTS, subsequent project selection processes, and performance monitoring frameworks.

Further insights on the process leading to the definition of the project portfolio are presented in section 2.1 of the report.

[11] http://www.iiep.unesco.org/en/iiep-foresight-papers-planning-future-rapidly-changing-world

[12] While some stakeholders indicated a clear preference for focusing on the more 'developmental' dimension of research which leads to the development of concrete tools and methodologies; other stakeholders highlighted the importance of conducting basic/exploratory research which can lead to the development of scientific publications. According to the latter, publishing in scientific journals gives research teams/researchers visibility, legitimacy and credibility.

2.4 The alignment of research projects with UNESCO institutional priorities

The R&D work conducted by IIEP during the 9th MTS took place in the context of UNESCO's 37 C/4 medium term strategy (2014-2021), and the corresponding 37 C/5 approved programme and budget. As such, this evaluation looked at the extent to which the R&D research portfolio and its corresponding objectives are aligned with UNESCO's broader ambitions in the field of education, as well as with the expected contribution of IIEP to these objectives. This analysis is based mainly on the comparison of IIEP R&D project goals, with the ambitions established in UNESCO's 37 C/5 programme and budget and UNESCOs global priority strategies for Africa and Gender. Unfortunately, the evaluation team did not manage to conduct an interview with a UNESCO representative who could have provided further insight on this particular issue.

In the framework of the 37 C/5, the IIEP is specifically mentioned under:

- Major Programme I on Education, Main Line of Action 1: Supporting Member States to develop education systems to foster high quality and inclusive lifelong learning for all. This MLA seeks support Member States to develop and strengthen education systems that provide quality lifelong learning opportunities for all learners, at all levels and in all settings of education. Specifically, the MLA seeks to drive the development of sound policies and plans for achieving educational development goals and contributing effectively to lifelong learning; and closing the multiple gaps in access to quality education requires a long-term vision and long-lasting engagement at a time when growing inequalities are becoming a major societal issue. Under MLA 1, the expected result is to strengthen national capacities to develop and implement policies and plans within a lifelong learning framework. Related key performance indicators are:
  - Planners and managers in beneficiary countries can organise planning processes, lead plan preparation, implementation and review
  - Policy-makers and senior personnel in ministries in charge of education understand the value of strategic planning and draw on the skills and competences of their planners
  - Training institutions in educational planning gradually build credibility as training providers with ministries in charge of education
  - The knowledge generated and packaged by IIEP is considered a reference for its target audiences
- Under Major Programme I, MLA 3 (Advancing education for all (EFA) and shaping the future international education agenda), UNESCO seeks to take a leading role in identifying lessons for the future, guide the debate on the future of education, monitor global education progress, mobilise partnerships for education and provide a coordination role at the global level. In line with this, expected result 11 is "Future education agenda and global education policies shaped, drawing on relevant research and foresight studies conducted by UNESCO and other institutions". Specifically, IIEP is meant to contribute to the performance indicator "number of IIEP research papers/studies on issues related to education planning published and widely disseminated".

The General Conference resolution 37 C/Res.5 for IIEP37 C/5 recognises the importance of IIEP in the implementation of Major Programme 1, especially when it comes to the delivery of 'research and studies aimed at the upgrading of knowledge in educational planning and management, and at the production, sharing and transfer of knowledge and the exchange of experiences and information in educational planning and administration among Member State'. Further, it states that the Institute's programmes will be informed by the following priorities:

- (a) improve the resilience of education systems to conflicts and disasters, as well as develop their governance and accountability to stakeholders and beneficiaries
- (b) pose gender equality as a central planning issue within broader equity-focused policies and programmes, and
- (c) encourage deeper reflection around the policy and programme options to improve learning outcomes during plan preparation, monitoring, and implementation review

The resolution states that while IIEP has a global remit, it should put special emphasis on countries furthest away from the MDGs and EFA objectives, and on African countries in particular. This is in line with UNESCO's strategic goal of providing targeted support for African countries, as per the Priority Africa at UNESCO operational strategy focusing on two major areas:

- Building peace by building inclusive, peaceful and resilient societies
- Building institutional capacities for sustainable development and poverty eradication

Specifically, the flagship programme 2 of the Africa strategy seeks to strengthen education systems for sustainable development in Africa: improving equity, quality and relevance.

The UNESCO Priority Equality Gender Action Plan delineates the actions through which UNESCO seeks to support the creation of an enabling environment for women and men from all walks of life, and to contribute to and enjoy the benefits of peace and sustainable development. Specifically, work under Major Programme 1, UNESCO seeks to work closely with partners and Member States on three thematic priority areas:

- better data to inform action for gender equality in and through education
- better legal, policy and planning frameworks to advance rights, and
- better quality learning opportunities for empowerment

At the strategic level, one can observe a very close link between the UNESCO's mid-term strategic goals in the field of education, and the goals established in IIEP's mid-term strategy. This applies of course to the goals set out for the R&D[13] pillar of IIEP. IIEP's intended goal to bridge knowledge gaps in education planning through foresight and policy-oriented analyses and research can be directly linked to the goals established under MP I, MLA 1 and 3. IIEP's MTS also builds on the goals and missions established in UNESCO's General Conference resolution 37 C/Res.5 for IIEP37 C/5 presented above.

In addition, the IIEP's 9th MTS directly builds on some overarching strategic goals established in the 37 C/4 and C/5, as well as in the Africa and Gender Equality Priority Strategies. This is clearly illustrated in the 9th MTS itself which recognises the need for UNESCO's two global priorities to remain in focus in the IIEP programme delivery. Specifically, the 9th MTS indicates that the Institute "will align with UNESCO's Priority Africa, noting that many of Africa's challenges are global ones". When it comes to Gender Equality, the MTS indicates that a "key aspect of IIEP's contribution to UNESCO's Priority Gender Equality will be to promote the use of evidence to improve boys' and girls' educational experience at every step of strategic planning".

As such, from a strategic standpoint, the goals of IIEP's R&D pillar are fully aligned with UNESCO strategic goals and ambitions. This is reflected in the use of Key Performance Indicators in the 9th MTS which are closely aligned with the performance metrics established by the 37 C/5, and

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[13] Referred to as 'knowledge generation'

more specifically for MLAs and ERs linked where the IIEP is expected to make a contribution (i.e., ER 1 & 11). This said, a scanning of IIEP activity reports reveals that IIEP did not systematically monitor or account for the share of R&D activities and related results directly tackling either of the global priorities (this was however done for IIEP training and technical assistance activities). This is not to say that IIEP did not address these issues at all as part of its R&D portfolio, as there are many examples of R&D activities which can be directly or indirectly linked to the Africa priority particularly (see Section 3.2.4). There is however a lack of a more structured and systemic approach to measuring how IIEP contributed to the achievement these goals through its R&D activities. In addition, it is unclear if and how the goals and expected results defined in UNESCO strategic documents have been explicitly used as selection criteria of the R&D activities and projects during the 9th MTS.

3 Effectiveness and impact of IIEP's R&D activities

The assessment of effectiveness is at the heart of this evaluation. In broad terms, effectiveness can be described as the extent to which the results stemming from IIEP's R&D activities are in line with the original intended goals and targets. In particular, our analysis has sought to measure the degree to which research activities conducted during the 9th MTS have produced evidence which has in turn been used in the context of educational planning processes at the country level. On top of this we have explored the underlying key drivers and challenges. In order to better understand what the IIEP originally set out to achieve as part of its R&D line of work, the reader of this report is invited to view the IIEP R&D Theory of Change explicitly developed in the context of this evaluation.

3.1 The level of achievement of R&D targets established under the 9th MTS

The starting point for our analysis of R&D effectiveness is to measure the extent to which the IIEP reached the targets established in its performance framework during this period. As will be explained later in this report, the monitoring and performance framework used during this period was very light, and not sufficiently sophisticated to capture the true nature of the results generated by R&D projects. There is also a very clear disconnect between the performance framework and the IIEP's intervention logic / ToC. This is clearly illustrated by the lack of performance indicators for the different types of expected results. As such, the analysis of official indicators and related results should not be considered to provide a full of IIEP R&D performance during the period. It is also worth highlighting that no performance frameworks have been established at the project level.

The analysis of IIEP's Result Assessment Framework 2014-2017 contains a number of indicators which can be deemed to be directly or indirectly related the institute's R&D activities. It is difficult to establish a link between indicators and the different pillars of the IIEP, given that indicators have been organised by mid-term objectives of the MTS, rather than by programme components, or outputs. The latter would have allowed to single out R&D-related performance indicators in a more straightforward manner within the Institute's corporate performance assessment and monitoring framework. This said, it is understandable that the corporate-level KPIs focus on tracking progress of the institute as a whole, and not of the individual pillars. However, such a high-level corporate performance framework should have been accompanied by a set of performance indicators for the different pillars and activities implemented by the institute, in line with the MTS. The following table presents the institutional KPIs indicators which the evaluation team has deemed to illustrate the performance of R&D,

the related targets, and achievements reported in the 2017 activity report presented to the Governing Board[14].

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[14] These indicators have been used for the purpose of this evaluation, in lieu of any specific indicators monitoring the progress of R&D-specific activities.

Table 4 Overview of R&D related performance indicators under the 9th MTS

	KPI	Baseline	2014 Targets	2014 Achieved	2015 Targets	2015 Achieved	2016 Targets	2016 Achieved	2017 Targets	2017 Achieved
KPI 10	Stakeholders stating that IIEP research is highly relevant (%, survey)	95	Monitored in 2015	Monitored in 2015	95	91	Monitored in 2017	Monitored in 2017	95	86%
KPI 11	Publications, including briefs and position papers, articles in peer reviewed journals (number, catalogue and records)	15	15	14	15	39	15	42	15	23
KPI 17	IIEP thematic platform users declare the content useful in their professional practice (%, beneficiary feedback)	--	Monitored in 2015	Monitored in 2015	80	N/A	Monitored in 2017	94	80	88.5%
KPI 21	Research programmes that foresee post-research investment (%, project documents)	--	100	100	100	100	100	100	100	100%

In green, fully or mostly achieved targets; in red, targets which were not achieved.

The figures presented in the table indicated that the IIEP reached or came close to reaching all of the R&D related targets. The share of stakeholders indicating IIEP research is relevant is lower than the expected target, while the share of thematic platform users declaring the content useful for their professional practices is higher than expected. However, a number of observations can be made regarding these indicators and related metrics:

- It is not clear how the baseline values have been determined, especially when it comes to the expected number of publications

- The meaning of 'Research programmes that foresee post-research investment' is not clear, nor is it clear why the values for this indicator are 100% across the board for all projects (both in 2015 and in 2017)

- The performance framework does not include any indicators allowing to capture the key expected outcome of R&D activities i.e., the uptake of knowledge and evidence in policy planning process at the country level. This represents a major blind spot of the performance assessment framework

- As will be illustrated in the following sub-section on the research outputs and outcomes of IIEP R&D work, the programme produced a very wide array of results which go well beyond simple publications. This richness of R&D project results was not captured by the performance framework used at the time.

3.2 Results of IIEP R&D projects

In addition to the assessment of programme's performance framework, the evaluation team has taken a more comprehensive approach to measuring the results of the selected IIEP R&D projects. We have sought to capture these results in the following sub-sections of this report, as well as in the R&D project activity case studies presented in the Appendix. In certain cases, the results are illustrated with examples drawn from specific projects. The section does not intend to focus specifically on some projects over others. Examples were selected mainly on the basis of their capacity to illustrate the message being conveyed.

3.2.1 IIEP research outputs

As mentioned already, the six R&D projects led to the delivery of a wide range of activities and the production of an equally wide array of outputs. In addition to the publications of papers and studies, the projects also carried out country study visits, policy fora and meetings, participation in international conferences, and the publication of shorter communication pieces. Dissemination outputs including videos and documentaries are presented in further detail in section 3.3.4. In some cases, projects also led to the development of training material and events. The following table tries to capture the richness of IIEP R&D project activities and outputs. It is worth highlighting that the outputs listed in the table are all closely aligned with the outputs identified in the ToC developed for the purpose of this evaluation.

Table 5 Overview of key outputs of R&D project analysed by the evaluation

Project Title	Overview of project activities and outputs
Improving school financing: the use and usefulness of school grants	- Five country reports (Haiti, DRC, Madagascar, Togo, Madagascar) (2016) - Two Comparative syntheses on school grants in francophone countries and Latin America – including benchmarks (case study on Honduras) - Four research briefs on improving school financing (2016) - Guidelines for policy makers and education planners to design and implement school grant policies

Project Title	Overview of project activities and outputs
	• One documentary • 8 videos on how to design and implement a school grant policy and 3 video interviews with researchers • One policy seminar in Paris involving several ministry of education representatives in Haiti, Madagascar, RDC and Togo as well as IIEP research team (2016) • Infographics and blogs, presentations at CIES conferences

Exploring the organisation and management of Teacher careers	• Publication:
	  – Teachers' career reforms – learning from experience (2019)
	  – Exploring the impact of career models on teacher motivation (2016)
	• Series of country notes on the subject of teacher career reforms
	• Three case studies in Ecuador, New York City and South Africa on the subject of teacher career reforms
	• Four research briefs on the rationale for reforming Teacher careers and new models, teachers' perceptions of career structure reforms and effects on the profession, design of teacher career structures and staff performance appraisal, and the implementation of teacher career structure reform
	• Article on the subject of reimagining Teacher careers for the 21st century and blog posts on ways to attract future teachers, teacher salaries, new career opportunities and teacher motivation, teacher career reforms, career structures and teacher motivation and improving learning by motivating teachers
	• Series of conferences on the topic of teacher career models across a duration of 4 years with various organisations including France Education International, Comparative and International Education Society (CIES), Organisation for Economic Co-operation and Development (OECD), The International Task Force on Teachers for Education 2030, also known as the Teacher Task Force (TTF)), UKFIET - The Education and Development Forum, French Ministry of Education, Youth and Sport.

Using Open School Data to improve transparency and accountability in education.	• Publication: Promoting Transparency through information: a Global review of school report cards (2016) • Study tour on My School initiative, Australia (2016): list of participants, agenda, and final information note. • Six case studies on Asia and the Pacific on Opening School Data to improve transparency and accountability (India, Indonesia, Pakistan, Bangladesh, Australia, Pakistan, Philippines) • Two regional state of the art reports for Africa and Latin America • One policy forum held in Manila (2018) • National dissemination event in Indonesia[15]
Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness?	• Eight university case studies published • An international survey, in collaboration with the International Association of Universities (IAU), to identify existing IQA practices internationally • Comparative analysis on IQA (in both English and French): synthesis publication • 4 policy briefs on IQA and management, IQA and employability, IQA and EQA and the effects of IQA (in English and French) • One International Policy forum (Xiamen, China)

[15] https://edukasi.kompas.com/read/2018/11/14/17125671/mendorong-keterbukaan-data-untuk-peningkatan-kualitas-pendidikan

Project Title	Overview of project activities and outputs
	• Publication produced from the International Policy Forum • Two national forums (one in Chile and on in Bahrain) • Blog posts, articles and web news • One four modular e-learning course on Designing effective and innovative IQA systems
Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires)	• 4 Country Reports on ICT in education programme (Colombia, Peru, Costa Rica, Uruguay) • Summary of 4 country reports: Revisión comparativa de iniciativas nacionales de aprendizaje móvil en América Latina • *Orientaciones a los paises relativas al trabajo de campo* • *Estudio Revision Comparativa Politica TIC consejo asesor*
Education financing: Improving national reporting systems on financial flows	• 6 national reports for participating countries (Côte d'Ivoire, Lao PDR, Nepal, Viet Nam, Senegal, Uganda) • National Education Accounts UNESCO UIS • *Atelier Final Paris Avril 2016* • *Rapports Pays* • *Guide Méthodologique CNE* • *Infos Générales* • *Présentations Méthodologiques* • *Présentations Pays* • Media coverage • Getting the full picture of education spending publication & Article on the seminar for research • Launch event in Uganda • Launch of the education commission report with input from the NAE project • Blogs and articles such as the GPE blog following national launches

In the framework of the 9th MTS, the production of on-line thematic portals is identified as one of the intended outputs of the knowledge generation stream of work. The existence of these portals was not frequently mentioned and put forward by R&D project managers, as being outputs of the research projects they had overseen. Based on the current version of the IIEP website, the institute is host to the following thematic portals:

• Planipolis – a data base of national education policies and plans and international development frameworks. It does not function to disseminate research

• IIEP Learning Portal – the project was implemented under the 9th MTS based on results from research conducted under the previous MTS. While the portal was implemented by the R&D team, it's not a research project per se. The scope of the portal is early childhood through to secondary education. The site is a tool for planners, and important links were developed with the training function of IIEP. The portal can be linked to the 'Improved cognitive and non-cognitive learning outcomes' priority of the 9th MTS (see section 2.3).

• HIV & Health Education Clearinghouse – A portal maintained by the IIEP on behalf of UNESCO. This was historically a component of the IIEP's research programme on the impact of AIDS on education. There is no link to current research.

- Ethics and corruption ETICO Platform created in the context of the R&D programme on ethics and corruption in education so directly contributing to share the related resources and contents of the programme.
- Education for safety, resilience and social cohesion : a website created within the context of a technical cooperation project, managed by the TC team, and within a partnership for the publication of a series of guides on the crisis-sensitive planning. The scope is dedicated to crisis-sensitive planning and education for resilience issues.
- PEFOP: Launched in November 2015 on the basis of the expertise of IIEP Dakar on Vocational training, and thanks to the funding of the AFD.

All of these portals have their own specificities and mostly are not directly attached to or managed by the R&D function. The Learning Portal and ETICO are the only notable exceptions. The portals are meant to cater to the IIEPs different audiences, and contribute to the Institute's mission to act as a broker of knowledge and to support communities of practice. Based on the information provided by the IIEP, the different portals have been created at different points in time, in the contexts of different projects, and for different reasons.

On the basis of a quick analysis of each of these portals, the evaluation team was unable to establish a direct link between the portals and the topics they cover, and the set of R&D projects implemented during the 9th MTS. The only notable exception to this is the Ethics and Corruption ETICO Platform, which hosts information and knowledge generated in the framework of the Open School Data project. As such, the production of thematic platforms as an intended output does not in principle appear to have been achieved in the framework of the 9th MTS. It is our understanding however that under the 10th MTS more examples of linkages between the portals and the R&D function took place. For instance, the research on Use of Learning Assessment Data benefited from having the Learning Portal, and the Teachers of Refugees research was promoted through the Ed4R portal.

The expected linkages between the thematic portals and the R&D research agenda and mission are not entirely clear from our evaluation team's perspective. While the platforms appear to fulfil a role of 'one-stop-shop' on information relating to specific subjects the IIEP works on, the way these platforms are expected to contribute to fulfilling IIEP R&D ambitions is not fully explicit. The linkages between the thematic portals and the thematic priorities establish under the 9th MTS is not straightforward either. The existence of these platforms under separate websites and visual identities adds to the impression that they are not completely embedded in the mainstream work of the IIEP.

This said, the evidence collected during the evaluation shows that the great majority of intended project outputs have been achieved. We have not identified any instances in which an intended output has not been achieved for a particular reason. As such, the great majority of projects managed to stick to their original plans in terms of their first-level ambitions. Unfortunately, however, projects and projects managers have not systematically captured/collected key data relating to project outputs. For instance, we have identified the lack of more systemic use of participant satisfaction surveys among people having participated in the range of events organised in the framework of the projects, as well as any type of mid-to-long term follow up actions. In addition, the R&D team did not collect and centralise any data regarding the level of distribution and dissemination of key research

outputs, such as papers and publications (in their digital or printed versions).[16] This is unfortunate given that while it is clear that R&D projects have led to a great number of outputs, it is less clear the extent to which those outputs were likely to contribute to the achievement of outcomes.

The manner in which the research has been performed is perceived as being in line with international standards. Interviewed stakeholders hold positive views regarding the research approaches used in the framework of the different projects, as well as the level of expertise and professionalism of the IIEP research teams in charge of heading and implementing much of the work.

3.2.2 *The influence of IIEP R&D on educational planning processes and policies in beneficiary countries*

The ToC identifies a number of key immediate outcomes in the lead up to the generation of intermediate and final outcomes. These mainly relate to the exposure of educational planners and policy makers, mainly in Ministries of Education, to the new knowledge and evidence on education planning and management stemming from research projects. Using data from the interviews with key staff as well as the deep dives into the projects, the evaluation has shown that all projects have gone to great lengths to ensure that the key messages and findings from the research reaches key policy makers and educational planners in the countries where the research has been performed. In many cases, key findings have also been presented to other stakeholder groups such as teachers' unions, civil society, as well as other government agencies and ministries. This has been achieved through the implementation of a range of dissemination activities such as meetings, policy fora, and the distribution of publications. In some instances, research results have also been disseminated via videos and blogposts. It is worth noting that in many cases, projects have explicitly developed, at the onset, a strategy to reach out their main audiences, and that dissemination actions and agendas have in many cases been driven locally by local project partners, with the support of IIEP. In some cases, UNESCO national commissions have also provided support in implementing national dissemination efforts. In Togo, in the framework of the School Grants comparative case studies, it was reported that "Ministerial authorities supported the team and issued all authorisations for the smooth conduct of the research. They also accompanied the dissemination of results."

In the case of the National Education Accounts project, for each country activity, key results from the reports produced by the project were presented by senior staff of the team to other government officials, NGO's, international organisations, teacher unions. At a country level, the results of the project reinforced the coherence and linkages between sectoral objectives and budget plans. The Honourable Minister in Zimbabwe, for example, highlighted the relevance of the project and assured the team that the key takeaways would be taken into account in the preparation of the Education Sector Strategic Plan 2016-2020. In most countries, the NEA revealed that teacher salaries represented the bulk of education financing (often at a threshold above 80%), leaving little budget for infrastructure financing. Ministries thus increased investments in school equipment, especially in rural regions.

In the case of the teachers' careers project, research results and finding from the analysis of best practices on teacher reforms have been shared with French policy makers. In this case,

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[16] The IIEP libarary collects and prepares this type of information for the annual reports to the GB.

the simple sharing of the analysis of international good practices acted as a conversation starter to renew dialogue with teacher unions in France.

The project and activity case studies in the Appendix, as well as section 3.3.4 of the report shed light on the dissemination activities that took place in the different target countries. As such, there is little doubt that key stakeholders within the Ministries of Education, as well as other key stakeholder groups within direct beneficiary countries have become exposed to the results of the IIEP's research projects.

The exposure of these stakeholders to information on how their educational systems work, as well as some of the key dynamics underpinning the different aspects which have been analysed, implicitly means that the human capacities of education planners and policy makers of these countries have been improved. Of course, the level and intensity of improvement of human and institutional capacities for education planning and management varies across the projects and the different activities implemented. For instance, some projects included formal capacity building components (e.g., IQA), or in-depth field visits (e.g., Open School data), which have led to formal and considerable learning outcomes. In the case of Open School data, the study visit to Australia is considered to have acted as a considerable 'eye opener' for government representatives who had previously ignored the potential value of open school data in developing policies and improving accountability and transparency.

In other cases, the capacity building dimension has been more informal, such as in the case of the NEA project where capacity building has taken place through the joint implementation of the research and data collection activities in collaboration with local partners. For instance, as a result of its involvement in the NEA project, Senegal was able to internalise the NEA methodology to develop a national expertise in education financing analysis. The country was able to install its own program to harmonise the collection and transmission of data in the policy-making process, and launch statistical campaigns of administrative data. Their program STAT'EDUC2, (which was initially put in place by IIEP) allowed to integrate different experiences of local districts and government partners.

In both of these processes, the IIEP R&D has contributed to changing some fundamental paradigms about how education systems work and how different types of policies can influence them. This is particularly the case of the NEA project, which has shed new and significant light on how resources are being invested in educational systems across the African region. The project has revealed the importance of household spending in education, which had been historically underestimated. The NEA also revealed that in Zimbabwe, more than 90% of education expenses were going towards teacher salaries. As a result, the government announced that it would increase the budget towards investment in infrastructure and equipment, which were unequally distributed across the country. Teacher salaries ended up representing 50% of expenditure 2 years after the publication of the country report. This is a clear example of how the development of new and more robust data has influenced policy making and policy thinking in beneficiary countries.

The ICT in education project also contributed to a broader paradigm shift with regard to the role of ICT in education. The project was successful in the sense that it contributed to changing views of schools and governments on the possible advantages that ICT in education could have. Indeed, IIEP were among the first to introduce the idea of promoting ICT in education, not only through communication with a variety of stakeholders but through actual evidence around the world. In the case of Uruguay in particular, the program *Plan Ceibal* was regarded as a model framework to advance ICT in education.

Under other projects, the influence of research results on policy design is less direct and linear. This is not surprising, given that the direct policy implications of comparative research activities

tend to be less explicit, and require an additional layer of adaptation and interpretation in order to lead to tangible policy changes and initiatives. There have been never-the-less several reported instances of policy initiatives having been driven by the findings and lessons of the R&D projects which have looked at examples of policy initiatives implemented in different settings.

- In the case of the School Grants project, it has been said that the report is being used by the Ministry of Education in Togo to develop a future strategy, and the Togolese government has also used in the strategies for managing and implementing School Grants from 2017 onwards. Countries outside of the scope of the study have also found research results useful. The comparative analysis research results were found relevant in Chile where the Government is still trying to revert to decentralisation policies. A cross country exchange occurred between Chile and Brazil on this topic. In Angola, the research findings were also found to be very useful

- In the case of school data, the exposure of Pakistani government officials to the work done by countries on open data allowed to drive the use of school data in some regions, particularly Punjab. In the Philippines, the research has clearly helped to improve the existing programmes. The School Effectiveness Division belonging to the Department of Education (i.e., the Ministry of Education) invited the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA) to be present in their capacity building events and trainings. In 2018, ANSA was able to convince them to go into the Open Government Partnership processes and to commit. The Ministry of Education has since then developed a course on transparency and included a number of references to open data in the training material

- In the case of IQA, research learnings on IQA from the IIEP have played a role both in Ethiopia and Bahrain in helping policy makers reflect on IQA practice. This includes improving data collection for IQA, implementing employability studies, restructuring an IQA unit, integrating QA with strategic planning of their institution, making changes to enhance teaching and learning practices, making IQA part of an institutional culture, strengthening the IQA processes and tools. All on-line course participants confirmed that the knowledge acquired has helped to improve their professional practice. The Higher Education Council in Bahrain in charge of implementing IQA has reported learning from Austria and Germany and indicated a willingness to consider changing some practices as it is in the process of making some organisational changes (disassociating the Higher Education Council from the Ministry of Education)

- In the case of ICT for education, sharing the methodologies and results of the research with Colombia, Costa Rica and Peru allowed those countries to legitimise their own ICT initiatives (evidence-based planning) and pressure their governments to increase budget for their own ICT in education programmes

Overall, comparative studies also increased the levels of visibility and acceptability of specific types of policy solutions, which in on broader terms, improved the conditions for the eventual take-up of these solutions.

The body of evidence illustrating the influence of IIEP R&D on policy making is however relatively modest. This should not come as a surprise, given the equally relatively modest resources IIEP has to perform R&D activities, and given that despite its applied nature, bridging the gap between research and policy-making is not a straightforward and linear process. In order to influence policy making, research must sometimes undergo several iterations and build up 'critical masses' of evidence stemming from several research projects. In addition, translating the results of research into specific pieces of policy often times requires additional

support and handholding, which the IIEP R&D projects were obviously not equipped to provide. Related to this, is the importance of latching on research projects to technical cooperation projects, which are a better position to help governments design and introduce new pieces of policy. At the end of the day, the R&D projects cannot be held fully accountable for generating policy change in the short term.

There is very little evidence of IIEP R&D having played any type of significant role in improving human or institutional capacities, raising awareness, or contributing to policy decisions in countries which were not directly involved in or targeted by the research projects. This is in part due to the fact that no direct monitoring of 'third-country' exposure to IIEP research projects has been undertaken and followed up on. But more broadly, it appears to be a direct consequence of the limited take up of research findings in such countries. This said, there are some instances whereby the information was disseminated outside the circle of beneficiaries. For example, findings from the School Grant research have been concretely shared with countries outside of the scope of the study, such as Chile or Angola. In addition, IIEP's research on School Grants is reported to have been well received in several south east Asian countries that were not formally part of the project scope.

3.2.3 The influence of IIEP R&D on the international community of educational planning organisations

One of the goals of IIEP's R&D work is to influence global thinking on educational planning, and support the work conducted by other international organisations working in the field. Despite the fact that the evaluation team was not able to contact an external organisation to discuss the perceived relevance/additionality of IIEP's research work, there is a global perception among stakeholders interviewed that the IIEP's R&D is visible and well respected among the broader international educational planning community. The IIEP is of course not only known for this work, but also for the unique brand of training and technical support it provides to countries and country representatives. However, the IIEP research brand is also well established and recognised. Part of this is due to the collaborations established by the research teams with external partners, such as UNICEF or the OECD. In the framework of the Teacher careers project, the OECD peer reviewed the final synthesis of the project and also referred extensively to the literature review when drafting their publication "Working and learning together". In the NEA project, the methodology to analyse financial flows was also used by the World Bank, who has also led complementary projects with regards to household expenditure, such as the BOOST program. However, the visibility of IIEP research is also driven by the different events and policy fora organised in the framework of the projects, as well as broader dissemination efforts. The former includes the participation of IIEP researchers in different high-level conferences and events where they have had the opportunity to present and discuss the results of the different projects.

3.2.4 Contribution to the Africa and Gender Equality global priorities of UNESCO

The IIEP has made clear contributions to the pursuit of goals relating to the promotion of better educational planning in Africa. As part of the portfolio of R&D projects, a number of these have had an explicit focus on Africa as a region, or individual African countries. As such, an important share of the efforts and resources mobilised in the 9th MTS have gone to supporting this work. Unfortunately, given the lack of more detailed financial and activity monitoring data, it's not possible for the evaluation team to provide a concise figure on the work allocated by the IIEP to the region, in comparison to other regions of the world. The following table provides an overview of the projects and activities directly involving African beneficiaries.

Table 6 Overview of activities focusing on Africa in the framework of the IIEP's 9th MTS R&D activities

Project Title	Overview of project activities and outputs
Education financing: Improving national reporting systems on financial flows	• Country reports for Guinea, Zimbabwe, Senegal, Côte d'Ivoire, Uganda • Members of each country delegation participated in an international NEA workshop in Paris • Dissemination of results through national media (Uganda's Communication Strategy was international and national in reach)
Improving school financing: the use and usefulness of school grants	• The comparative analysis synthesis publication studied school grant policies in place in several African countries (Madagascar, DRC, Togo) • Initial technical workshop organised at the onset of the research, gathering all the research teams, was organised in Madagascar • National research briefs on several African countries • National dissemination seminars were organised in each country to present study results (37 participants took part in the policy forum in October 2016) • The documentary and series of video interviews showcased school grant policies in African countries and African researchers
Exploring the organisation and management of Teacher careers	• Literature review exploring different models of teacher career reforms (Ethiopia, South Africa) • Country note on teacher reforms in South Africa and Ethiopia • Case study on teacher career pathways in South Africa
Using Open School Data to improve transparency and accountability in education.	• The literature review prepared as part of the research covered ref. from several African countries (Ghana, Malawi, Nigeria, Rwanda, Tanzania, Uganda) • A team from Ghana participated in the Policy Forum held in Manila • One regional state of the art report focused on Africa: Information and transparency: school report cards in sub-Saharan Africa
Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness?	• One online course for African universities (funded by Norad) • IQA University case studies (South Africa, Kenya) • Participation in conferences in several African countries (Southern African Network for Quality Assurance in Higher Education. Maseru, Lesotho) • Joint Open Seminar of Botswana Qualifications Authority, DAAD and IIEP, 8 July 2019 • Forthcoming e-learning action-training on IQA for Tunisian universities (under preparation at the time of the R&D evaluation) to be organised from April to June 2021i (with funding from the World Bank)
Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires)	• No activities focused on Africa

Of course, the incorporation of the Pôle de Dakar into the IIEP in the early stages of the 9th MTS greatly contributed to promoting the presence of Africa in the institute's overall activities, including R&D. The existence of two regional offices (i.e., Dakar and Buenos Aires) represent, in the view of the evaluation team, a great asset for the IIEP in its efforts to disseminate research findings locally, and adapt the focus of its research agenda to these regions.

The contribution of IIEP's R&D activities to bridging the gender gap is limited. This has been recognised by IIEP staff, and is mainly attributed to a lack of resources, the fact that this represents a new area of work requiring heavy investments up-front, a lack of expertise

available in-house, or the restructuring of the IIEP which implied that the gender focal point was included in the training team. While the IIEP did perform some smaller scale studies looking at gender equity, none of the flagship projects implemented during the period explicitly focused on this issue. The 2014 IIEP activity report does mention some activities related to gender equality, including:

- A study looking at young rural women in Argentina producing advice for policy and strategy design for five different regions
- The consolidation of research outcomes of three activities on gender equality: learning achievement, educational leadership, and a literature review on intervention impact
- Analysis of data from the Stories behind gender differences in student achievements in Kenya
- Study on gender equality in educational leadership looking at leadership roles in ministries of education in Argentina and Kenya
- A literature review commissioned by DFID on the expansion of girls' education and improvement of gender equality

According to the same report, a number of areas for further research were identified, including strategies to include marginalised girls and women in decision- making, and action on gender-based violence. However, these issued to not figure prominently in the 9th MTS research agenda. As such, the contribution of the 9th MTS to bridging the gender gap, from an R&D perspective, was limited. It is worth noting however that during the 9th MTS, a number of training activities were delivered with a specific focus on gender (e.g., on-line course on monitoring gender equality). Most of these training activities capitalised on knowledge stemming from research projects conducted during the 8th MTS (e.g., gender equality in learning outcomes).

3.3   Key drivers and barriers to the achievement of R&D goals

While the previous section explores some of the key achievements of the R&D projects, this section explores some of the key drivers and barriers to these achievements. In particular, it picks up on the pre-conditions and threats identified in the R&D function's ToC (see Figure 1).

3.3.1   *Quality of researchers and the promotion of research quality by the Research Advisory Council*

One the key determinants of quality research outputs and outcomes is the quality of the researchers in charge of conducting the research, as well as the research management protocols put in place to do so. In the case of the IIEP, there is overwhelming evidence that the researchers in charge of delivering the research projects are not only very experienced researchers, but also are extremely knowledgeable in their respective fields of work. The researchers naturally have more experience in some fields, which makes it sometimes challenging to explore and/or work on new topics, or topics which may fall outside of their immediate fields of expertise.

The greater majority of interviewees also agree that the external researchers and experts involved in the development of many of the research products displayed a very high degree of professionalism and expertise. This is reflected in the high-quality publications and papers published by IIEP during this period.

At a more macro level, a research oversight function is also necessary to ensure that the research being performed is not only relevant but is also being conducted in accordance with the most advanced research principles (e.g., from an ethical or methodological perspective). This is in part the reason for which the IIEP implemented the Research Advisory Council (RAC)

at the beginning of the 9th MTS (replacing the Council of Consultant Fellows)[17]. The purpose was to convene "distinguished scholars of outstanding academic and professional background....to help shape its research agenda and activities in an optimal way".[18] This was and is a small Council with a number of different functions including providing advice on foresight and research as well as to support pro-active fundraising. The interviews with RAC members confirmed the calibre of the individuals and the importance of the objectives of the RAC. However, the interviews also indicated that the RAC was underused, and were not also able to attend the meetings on a regular basis. Therefore, the RAC is underutilised, with two of its advisory functions (research priority setting / foresight and fundraising) being crucial to enact.

3.3.2   Buy-in from local stakeholders

Buy-in and support from local stakeholders for the research being conducted is not only crucial to the successful implementation of the projects, but it also significantly increases the likelihood of uptake of research findings in the short term. Here again, the IIEP has demonstrated its capability to build close and cooperative relationships with local stakeholders (e.g., public authorities such as education ministries), to perform its R&D functions. A high degree of participation and commitment for the research projects was observed in all the research projects, on behalf of local counterparts. This high level of commitment and support stems from the very valuable individual networks the IIEP researchers have, but also from its strong visibility and good reputation. In many instances, this is also driven by the fact that projects are designed with the intention of having local counterparts and beneficiaries participate as partners, which in many cases translates into these partners carrying out part of the data collection and/or research activities.

The individual project and activity case studies performed as part of this evaluation offer a plethora of examples illustrating the high level of buy in from local authorities for IIEP R&D. In the case of the NEA project for instance, the research team worked intensively and hand in hand with ministries of education, ministries of finance and national statistical institutes. In the case of the Open Data Project, a high-level policy forum was organised in Manila with the support (including significant financial support) of the national government. In this case, the Minister of Education was personally involved in the organisation of the event. The very strong support provided by the Government of Australia to the Open School Data project, including the organisation of a local study visit, also illustrates IIEPs capacity to engage and mobilise local stakeholders in the performance of its R&D work. Regarding the IQA project, the Chinese government through its Higher Education Evaluation Centre was strongly involved. HEEC supported the participation of Xiamen University in the project. Both HEEC and Xiamen University co-funded the organisation of the International Policy Forum and supported it organisationally. Some 50 representatives from the Chinese university sector participated in the Xiamen Policy Forum in 2016 to learn from the IQA research findings for their own university[19].

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[17] It is worth highlighting that the RAC is not meant to peer review the work of the IIEP R&D team.

[18] Governing Board Minutes 52_GB_11_E, 2014

[19] Unfortunately, while envisaged, it was not possible to obtain any interview with the Chinese authorities to discuss the impact of the IQA project on the Chinese higher education sector.

At the other end of the size spectrum, The Kingdom of Bahrain and University of Bahrain (accounting for over 60% of all students in the country) developed strong ties with the IIEP in the framework of the IQA project. The IIEP was asked to co-organise a national forum on IQA in Bahrain end of 2018 and present the findings from the research, together with the case study author from Austria. The forum brought together representatives from the entire Bahraini HE sector.

3.3.3 Cross-stakeholder dialogue

The existence of intersectoral dialogue was often identified as a pre-condition for implementation of policy reforms in the field of education and education planning. Cross-sectoral and cross-stakeholder collaboration was often seen as well as a key determinant of R&D project success. As mentioned by one IIEP interviewee, "experts within national ministries with a real interest in making changes based on evidence is a prerequisite to introduce any change. Inviting civil society to partake in the policy reform debate is essential too". The portfolio of R&D projects offers a number of examples of this type of collaboration taking place, either in the framework of the projects, or in the lead up to the design or introduction of policy reforms. It is particularly interesting to note that in some of these cases, IIEP projects led to the promotion of collaboration and dialogue between public sector stakeholders and civil society.

For instance, under the NEA project, IIEP worked and brought together ministries of education, ministries of finance and national statistical institutes. The implementation of surveys on household spending on education required the involvement and mobilisation of these different stakeholders. Under the Open School Data project, there was a pro-active promotion of dialogue between government and civil society in the six countries the project worked. These parties got to meet and interact in the framework of some of the activities organised by the project, such as the policy forum held in Manila. Many of these civil society organisations, namely in Indonesia and the Philippines, continue to collaborate with ministries of education, either as independent consultants or as speakers at events and conferences. For the School Grants project, a national team was set up composed of researchers from a national research training institute or university, and experts from the Ministry of Education and of the Ministry of Finance where possible. Collaboration with regional research institutions was sought so that the project could build on their expertise in research, policy analysis and advice. Finally, in the framework of the IQA project, dialogue was stimulated between HEIs and national ministries on the national IQA policy in Bahrain and Chile.

3.3.4 Research dissemination practices

A key focus of the work at the IIEP is the consideration of ensuring the research is made accessible (and in an accessible format) to the key audiences. Already following the 2012 evaluation of IIEP Research there were changes introduced in dissemination, with recommendations to include formats tailored to different target audiences, and to take more advantage of local meetings and seminars. The interviewees for this evaluation provide an indication that the dissemination was better dealt with under the 9th MTS then previously. For the 9th MTS, the range of products is broader, although the main outputs remain the reports and case studies. There is still some work to be done, and across the interviews, there were questions raised as to how well the reports are taken up by national policy makers.

There are several aspects of dissemination practices to consider:

- The embedding of dissemination within the research process (project level dissemination)
    - As an integral part of the research
    - As part of the wider-scale communication strategy/plan

- The communication plan – programme level dissemination (including choice of formats, channels etc)

The methodological approaches taken across the portfolio of projects support well the embedding of dissemination within the research. This is through, for example, the inclusion of national teams (and/or experts) within the research, partnership approaches, the organisation of policy forums and seminars. This is more implicit than explicit, and the approach is more closely aligned to the objective of the need for quality and relevance in the research than dissemination per se. More explicit dissemination is seen in the development of training courses and end of project conferences, although this is not always articulated as part of the project level dissemination / communication strategy. There is a high level of responsibility given to the national experts to undertake communication as part of their work as well (which is positive). Nonetheless, the dissemination strategy was not defined at the start of the project under the 9th MTS, and no funding was provided to ensure its effective roll-out. The take up of research is augmented by the involvement of local/national teams. This is clear for example in the case study on New York City prepared for the Teachers' careers project and in the case of the National Education Accounts where there was strong national coverage in the concerned countries. There was a specific communications campaign for School Grants where it was agreed with the national teams that they would undertake dissemination activities, which led to good media coverage.

For National Education Accounts, their tailored communication plan highlights the objectives of not only sharing the results within the eight countries who were part of the research, but also recognises that the methodology is as important in this instance as the results of the research for educational planners, and thus has global appeal. If the results of the project led to significant policy discussion and change within the participating country, the real value of the project lies in its methodology, which should be disseminated more effectively at an international level. Both the National Education Accounts communication plan, and the Open School Data communications plan mention their use of other platforms as communication and dissemination outlets (within UNESCO and outside).

There are also other powerful examples of dissemination opportunities which were realised, for example for the IQA project (at the Xiamen international policy forum, the national conference in Chile, the IQA Forum in Bahrain, and the workshop organised in support of the year of internal quality assurance – 2018- in Mongolia and more recently the preparation for an e-learning action-training on IQA for the Tunisian higher education sector). IQA as a project capitalised on a number of opportunities which led to take up of the research, and the training programme. There was a concerted effort to maximise the outputs of the research through articles, blogs, conferences (including several keynote speeches).

Key findings from the interviews show a slight discrepancy in dissemination between the wide range of actors involved in the project and the target audience of the research publications. Indeed, this latter group remains relatively narrow, aimed almost exclusively at stakeholders very well acquainted with the project such as ministries of education. An opportunity for dissemination would be to widen the intended target audience of the publications of the research. The most compelling example would be for the Open Data project, in which there was an overwhelming consensus that the research should be made more accessible to reach students, teachers, and NGOs. Indeed, in order for the research to enact policy change, it also needs to target an audience at a local level, so as to create a "bottom up" approach to policy discussion. These stakeholders (parent-teacher associations, NGO's, students) should not only be involved in the process of the study, but also in the policy changes that are expected once the results are published. The Open Data study is based on the premise that public institutions are legally required to publish their data, but many of these local stakeholders were unaware

of their rights. For example, in India many parents were unaware that public schools are legally required to have a playground for children. Disseminating the knowledge to these actors would increase awareness and government accountability.

Focusing on the wider communication plan under the 9th MTS, interviews with staff, and research undertaken for the case studies show there was still a rather ad-hoc approach to dissemination. There were a number of questions raised as to whether the research outputs were reaching the intended audiences and weak evidence of policy influence. The timing of the dissemination planning (in relation to disseminating the end products) was still a challenge under the 9th MTS. The dissemination for the final research projects tended to happen after the end of the project, which was also the end of the research phase, and staff had moved on to the next research. This creates limitations in the amount of time that can be devoted to dissemination of the conclusions.

This is not to say that some of the approaches taken were not good and there were significant successes in relation to the National Education Accounts, for example and School Grants, amongst others (as previously mentioned).

It is also clear from interviews that much has changed in the last few years, after the period under evaluation, and it would be remiss not to mention the improved monitoring, metrics and the audience segmentation work (which is ongoing). This has already started under the 9th MTS and the communications team are currently focused on ensuring that communication planning is considered from the outset (from the research planning). The communications team was not in place at the outset of the 9th MTS with the communications offices and the web manager joining one year into the period under review.

Nevertheless, the 2016 communication's plan sets out clear communication objectives and core messages, although these sit at the level of the IIEP rather than specifically for research activities.

There are a number of outputs from the research:

- Main comparative reports (including synthesis reports)
- Case studies
- Policy briefs
- Online courses/ training

There are also a number of communication channels used for research:

- Website
- Newsletters (print and electronic)
- Policy forums / events
- Blogs
- Social media (LinkedIn, Twitter etc.)
- Press releases
- Videos/podcasts
- Articles (including interviews)
- infographics
- Posting content on other channels

3.3.4.1   Outputs from the research

With regard to the main outputs from the research, these have remained standard. There is evidence from some projects, such as open school data of good examples of dissemination of main outputs. In Africa for example, the regional state of the art paper was sent to all the delegations and national commissions of UNESCO for Africa. There was feedback from several ministries on the quality of the work and as well as reports of the publication being seen in donor agencies and ministries. Overall, there is little doubt about the quality of the publications and research. However, what is known about the dissemination and uptake of the reports remains anecdotal. There are also concerns from those interviewed that the main publications from the IIEP Research is not used enough, or that it is not known how it is used, especially by policy makers. There was a perception from some that the access to this information was low (not readily available).

In addition, and outside of the control of the IIEP, there were several instances of significant changes in government during the period in a number of countries involved in the research which appear to hinder dissemination and take up. As one interviewee said, "when ministries change, the whole team changes and therefore communication gets difficult". This shows a certain limited view of the outputs of research having to be about a user's specific situation rather than something which has important and validated findings which can be used and translated into practice in a number of ways.

The issue of quality (high) is mentioned throughout the evaluation with respect to the research outputs. This is one reason why it is difficult to consider moving away from the research reports, case studies and policy briefs as the main output for those who wish to use the research in practice. This is not to say that other communication channels (and associated communication outputs – blogs, videos) are not increasingly important. In communication, the media mix is used across a "customer journey", dependent on the varied needs. Thus, a wide audience is exposed to messages, knowledge and information which is applicable to them and only for those relevant will the research report be accessed.

The current diversity of communication channels is a positive evolution in the way in which the IIEP approaches communication. There are also some innovative approaches that are well received. As the 9th MTS was the first one in which a more segmented approach was undertaken, there is room for improvement in relation to the way in which channels are chosen and for what purpose. This will be guided in the future by the better monitoring, and the audience segmentation results.

3.3.4.2   Communication channels

The following table shows the communication channels used across the project portfolio (excluding the website and newsletter which are common for all).

Figure 6 Communication channels used across the project portfolio (reported by IIEP)

Project Title	Policy forums/ events	Blogs	Social media	Press releases / Press coverage	Videos / podcasts	Articles (IIEP)	Posting content on other channels	Infographics
Education financing: Improving national reporting systems on financial flows	√	√	√	√	√	√	√	√

Project Title	Policy forums/ events	Blogs	Social media	Press releases / Press coverage	Videos / podcasts	Articles (IIEP)	Posting content on other channels	Infographics
Improving school financing: the use and usefulness of school grants	√	√	√	√	√	√	√	√
Exploring the organisation and management of Teacher careers	√	√	√	√	√	√*	√	
Using Open School Data to improve transparency and accountability in education.	√		√	√	√*	√	√	√
Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness?	√	√	√			√	√	√

* Developed after the 9th MTS

The main issues faced by IIEP Research under the 9th MTS was how to plan, execute, monitor and evaluate their communication and dissemination plan more specifically so that the research reaches the wider audience and is digestible, useable and gets taken up by (relevant) policy makers and practitioners. Many of the IIEP communication tools and channels currently used were started under the 9th MTS including the launch of the new website which allowed for more web content, a print and electronic newsletter and the opening of social media accounts. The focus was then on how to use these tools and channels to better reach the audience.

At the time of writing this final report, the evaluator was provided with access to information on the publications online, the views, downloads and consultations of reports (as well as extracts from the audience analysis). The methodology for extracting the data on publications downloaded changed during the period of the 9th MTS so it not possible to look at trends over time. The way in which the 2019-2020 data is downloaded means that you can look at trends over time in the future (including average views per year).[20]

In order to illustrate how the data can be analysed we have taken the 2020 and 2019 publications downloads (outside of the 9th MTS but with more data points). The first figure shows the publication languages and number of publications for 2019 and 2020 and indicates that

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[20] The data however could benefit from additional cleaning

over half of the publications are English and the majority are English, French and Spanish, as expected. There is also an increase in the number of publications from 519 to 912 and a decrease in the relative share of English publications.

Figure 7 Languages of publications, 2019 n= 519 and 2020 n=912 publications

(qaa is unknown)

Figure 8 shows the total views of all publications per language for 2019 and 2020. There has been a significant increase in the number of views from 2019 to 2020, even taking into consideration the total number of publications.

Figure 8 Total number of views of all publications per language (2019; n=92,488 views) (2020; n=344,776 views)
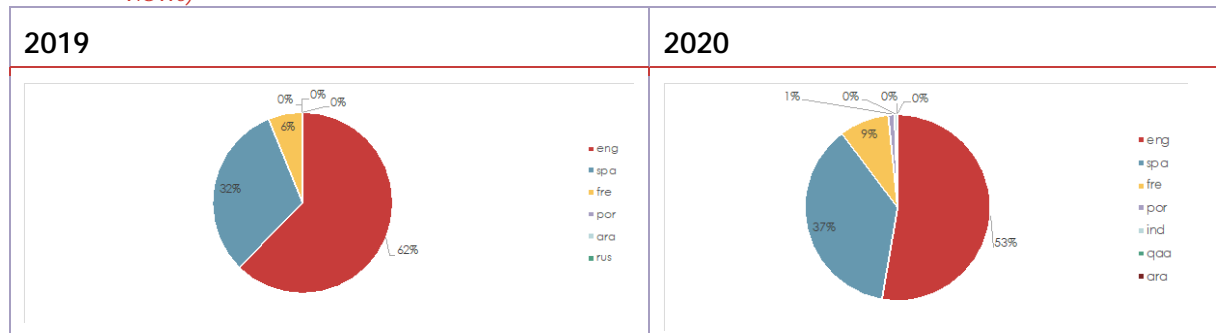
(qaa is unknown)

Figure 9 shows the total number of downloads of all publications by language in 2019 and 2020. Here, there is further evidence of increased audience engagement as the number of downloads rises from 9,096 to 42,210.

Figure 9 Total number of downloads of all publications per language (2019; n=9,096)) (2020; n=49,210)
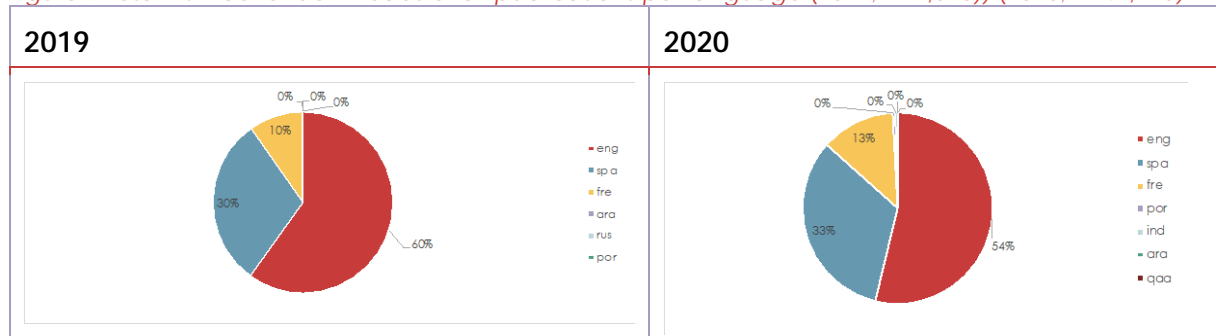
(qaa is unknown)

Further reinforcing the increasing audience engagement, Figure 9 shows an increase from 84,274 in 2019 to 361,515 in 2020 with regard to consultations.

Figure 10 Total number of consultations of all publications per language (2019; n=84,274) (2020; n=361,515)
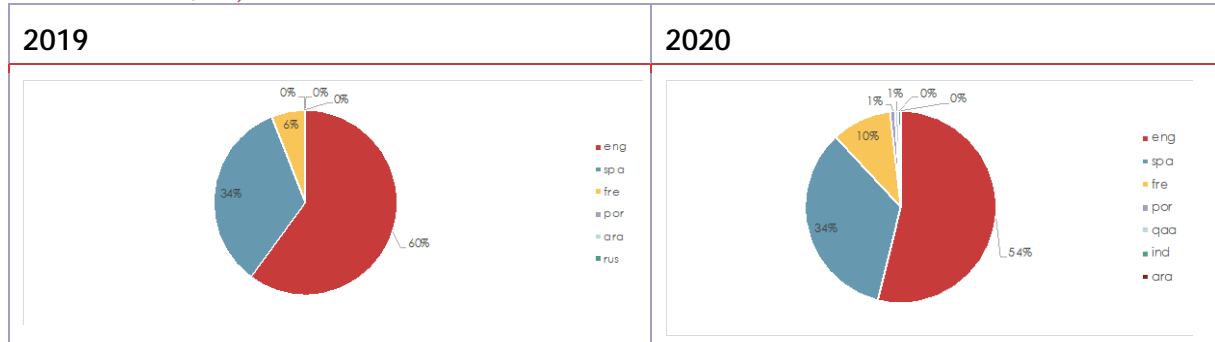
2019	2020

(qaa is unknown)

Finally, we have extracted the top 20 publications over 2019/2020 and calculated the average number of views per year. Information such as this can be fed into the planning processes, taking into account the project, the intended audiences and the use.

Figure 11 Top 20 publication views 2019/2020

Title	Language	Average number of views per year
Learning at the bottom of the pyramid: science, measurement, and policy in low-income countries	English	755.67
Internal quality assurance: enhancing higher education quality and graduate employability	English	722.00
Rapport d'état du système éducatif national de la Côte d'Ivoire: pour une politique éducative plus inclusive et plus efficace	French	660.00
Quality management in higher education: developments and drivers: results from an international survey	English	640.00
Competencias para la profesionalización de la gestión educativa: diez módulos destinados a los responsables de los procesos de transformación educativa	Spanish	548.50
What is educational planning?	English	541.35
The IIEP letter: news and analysis on educational planning and management, vol. 35, no. 1	English	528.50
Los proyectos de educación: preparación, financiación y gestión	Spanish	495.40
Questionnaire design: module 8	English	464.70
Development administration: obstacles, theories and implications for planning	English	445.00

Title	Language	Average number of views per year
Burkina Faso: rapport d'état du système éducatif national du Burkina Faso: pour une politique nouvelle dans le cadre de la réforme du continuum d'éducation de base	French	429.25
Major problems facing educational planning in the next decade	English	415.42
The role and impact of NGOs in capacity development: from replacing the state to reinvigorating education	English	408.82
Massive open online courses: the emerging landscape of digital learning in India	English	362.50
La integración de las tecnologías de la información y la comunicación en los sistemas educativos	Spanish	361.50
Planning education, building the future: 10th medium-term strategy, 2018-2021 (of international institute for educational planning)	English	361.25
Quía para la elaboración de un plan educativo de transición	Spanish	354.25
Designing and implementing a school grant policy	English	346.67
Herramientas para la gestión de proyectos educativos con tic	Spanish	333.15
Entornos digitales y políticas educativas: dilemas y certezas	Spanish	331.00

For more in-depth analysis, linking this type of data to the projects would provide more granular insights into the use of the publications. This abovementioned data can be used in the future for the planning of the targeted dissemination and can be embedded in the project design phase. In addition, the IIEP library already monitors and compiles consultations of IIEP publications which are included in UNESCDOC, UNESCO's repository for the IIEP annual Governing Board reports.

With this input, a standardised approach can be taken to outlining:

• Target audiences
• Identifying needs (what do they need to know about the research)
• Identifying the message
• Identifying the communication tools and channels (including intermediaries / multipliers)[21]
• Evaluation and monitoring (including most important outputs, language preferences, key moments of engagement, engagement with owned media, for example)

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[21] The thematic portals can also play a role of intermediary and multiplier

One issue to highlight is the growing use of participatory approaches to communication in public policy, something which IIEP already has a head start with through its research projects. The global trend towards a two-way policy communication is to be set in the context of an increasing adoption of the principles of transparency, integrity, accountability and participation for democracy and inclusive growth. Online media offers a host of opportunities for participatory engagement which could be built into the research and augment communication / dissemination. This approach grew over the 9th MTS.

3.3.5   Sustainability of R&D research actions

One of the factors which has often been identified as a key driver of successful project implementation is the existence of long-standing 'thematic lines of work' at IIEP. In practice, this is reflected by the existence of several subsequent R&D projects exploring related topics under a broader thematic area, throughout multiple MTS. This is for instance the case of work carried out in the field of ethics and accountability, as well as in the field of decentralisation and quality assurance (present in the 8th and 9th MTS). The existence of these 'historical' topics allowed researchers under the 9th MTS to build and conduct their projects on the basis of the results, networks and achievements of previous projects. In addition, this allowed the 9th MTS project to contribute to building 'critical masses' of data and evidence on specific issues, which could then be used to generate policy changes and policy lessons, not on the basis of a single project or country case study, but on the basis of several of these.

While the evaluation team agrees that thematic research sustainability can increase the visibility of IIEP's research and add to the recognition of the institute as a thought leader in specific fields of action (thus contributing to the development of a clear value proposition); it is also important for the institute to maintain its capacity to take on new issues falling outside of the scope if its traditional fields of work.

3.3.6   Support of IIEP Dakar and Buenos Aires offices

As mentioned earlier, the IIEP is structured around it Headquarters based in Paris, and two regional offices: Dakar and Buenos Aires. While the Buenos Aires office has been a formal part of the IIEP for a number of decades, the Dakar office only formally made part of IIEP in the Fall 2013, when the 9th MTS had already been designed and approved. The incorporation of the Dakar office took time with regard to its contribution to the implementation of the MTS. Nonetheless, the desire was to enhance the Institute's services to the African continent, as well as to strengthen IIEP's overall work in education sector analysis.

The existence of these two offices, represents in our view, a great opportunity to anchor the work in the field of R&D at a local level, better serve the needs of local Member States, as well as to source new and innovative project ideas based on the identification of local needs. The existence and availability of researchers with knowledge of local ecosystems, local networks, and the capacity to mobilise local stakeholders in the development and dissemination of R&D research results, is a key asset for the IIEP as it pursues its mission to develop new and better knowledge for better educational planning policies. One interviewee also pointed to the value of regional offices in developing collaborations with other partners. For instance, the BA office recently collaborated with the Global Education Monitoring Report in the organisation of their annual regional forum in which the GEM is now a co-organiser.

The value of the collaboration with the regional offices has been illustrated by the work conducted as part of some of the IIEP projects such as:

- The NEA project where the Dakar office staff was heavily involved in all aspects of the project.

- The Open Data project and the Teacher careers project where data and information exchanges took place between the Paris team and the Dakar office.
- The BA office also worked on the School Grants research.
- The teachers' careers project was jointly implemented between Paris and BA. Here the cooperation with BA was considered to play an important role in contributing to the on-going debate around teacher career reforms in countries such as Mexico, Ecuador, Peru, Colombia, and Chile.

Of course, the ICT for education project was led and delivered directly form the BA office.

Some stakeholders did however point out the need for further coordination between IIEP Paris and the regional offices when it came to the roll-out of the 9th MTS' R&D activities. In certain cases, the regional offices felt there were missed opportunities for collaboration when specific projects lead by Paris had a focus on their respective regions, and believe a more extensive involvement on their behalf could have been beneficial to the further uptake of research results targeting these regions. In addition, the overall distribution of R&D resources and activities is heavily concentrated within the Paris office, with only one project being implemented outside of Paris.

Finally, there is a need to ensure that there is an adequate level of coordination at the programming level in order to align the R&D research activities planned and being performed at the Paris office of the IIEP, and the field office level. This however does not mean that a top-down approach should be adopted when it comes to the definition of the research agenda of regional offices. On the contrary, several interviewees highlighted the importance of ensuring that regional offices are able to identify and define the research topics they would like to address. An adequate balance between the level of autonomy and the adoption of a coherent research agenda needs to be reached.

The conditions for a more productive and synergetic collaboration between IIEP Paris and regional offices appear to be in place. Not only has the Dakar office fully integrated the IIEP by now, but both offices have also recently made efforts to strengthen their dedicated research teams and bring on additional person power, as well as to restructure them in a way which is coherent with the structure of HQ. The Dakar office is in the process of developing a new R&D strategy, which is to be closely linked to the other activities performed by the office.

3.3.7 Challenges in the delivery of projects and achievement of goals

Countries faced both common and specific challenges in the successful uptake of research results. As concerns common challenges, language barriers remain an issue when abstracts are not available in the national language. Making the information available in national languages, not just English, is hugely important for accessibility, particularly in the case of comparative case studies.

Political contexts also play an important role in how easily research findings can be integrated into policy. Institutional support from authorities is key to an effective dissemination of policy findings. Some countries are culturally opposed to evidence-based policy making or lack the in-house staff to do so. One country representative working on school grants policy reported that the analysis was quickly forgotten due to a lack of available education experts within the Ministry. An unstable political environment will limit the extent to which remarks, and recommendations are taken into account. Many countries are affected by regular reshuffling. Ministries change, so do their style and equipment. It is therefore difficult to give continuity to policy change processes.

An illustration of this is the situation observed in Bahrain where the question of IQA is split between several agencies. A power conflict has been reported between the Higher Education Council and the Quality Authority for some years which has limited the possibility of change. This may now evolve with a new decree set to separate the HE Council from the Ministry, but it has limited the extent to which research recommendations have been currently used.

Corruption also poses a problem in the successful implementation of certain policy recommendations. In the case of the Teacher careers reforms, introducing a variability in paying teachers is open to misuse.

Other challenges are much more specific to the topics of the research itself. For the School Grants project, the team experienced bottlenecks with the previous school grants research in East Asia and the Pacific and Eastern and Southern Africa. The research was not yet completed which led to delays for the start of the project in Francophone Africa. In the context of the NEA project activities, due to the technicality of the project, a recurring obstacle was the gathering of comparable data. In one case the data was heavily decentralised to multiple ministries, overlapping local authorities and districts, making the mapping out of flows confusing. Another case is when the finance data is owned by the Ministry of Finance, in which case the access to that data heavily depends on the willingness of the ministry to grant access, and in general on the culture of sharing data in the country. Here, although local governments generally have a better sense of education needs (recruitment, textbook, student outreach), regional budgets are ultimately decided at a central level.

Another challenge reported in the NEA project was the fact that the project was novel and based on trial and error. One interviewee mentioned the metaphor of "building the plane and flying it at the same time". Training by UIS and IIEP occurred through 4-6 field missions in the country of study for a 2-year period. A challenge in this regard was that they were developing a methodology at the same time as the data was being collected.

A particular tension of the NEA project was mentioned with regards to the level of scalability and adaptability to a certain context. One of the objectives of the project was to publish data internationally and propose a methodology that works both for the country and for international comparison. Although country project leaders were appreciative of the level of the adaptability that was given, it was difficult to achieve this second objective of international scalability.

In the case of the Aprendizaje mobil project, the main challenge was that the concept of ICT in education at the time was relatively novel in 2014. The fact this was completely new meant that a major challenge was to find relevant data (who has access to mobile phones?), and also that the consultants in charge of doing the field work had limited first-hand experience on mobile learning.

In the IQA project, some minor challenges were identified with regard to the sourcing of new cohorts of participants to follow the course. While online courses are well adapted to reach less connected participants in any region of the world, one interviewee reported that it is hard to attract new participants outside of those that are already known to the international IIEP circle. Mobilising funding to cover participation is also sometimes seen as a challenge to attract new participants, particularly for those organisations that are less connected to international networks and funders. The IQA authority in Bahrain for instance funded its participation through the JIKAKA initiative, a global initiative for quality assurance capacity.

Many countries face sustainability challenges. In the NEA project, the grant lasted 2 years, and most countries who were very keen on developing the project further (e.g., Côte d'Ivoire) did

not have the technical or human resources to effectively internalise the NEA methodology into their own education planning. Senegal was the exception.

4 Internal coherence of IIEP's R&D activities

Coherence can be described as the extent to which there is a good level of coordination and consistency across the different activities implemented under a single programme or a single organisation. In the context of this evaluation, we have looked at the level of coherence across the different projects implemented during the 9th MTS, but most importantly; the level of coherence across the three main pillars of IIEP activities i.e., technical cooperation, training and research and development.

4.1 Coherence of IIEP's R&D projects

The level of coherence across all of the analysed research projects is relatively low. Beyond the fact that the majority of projects can be directly linked to the field of educational planning, and the high concentration of projects in the field of 'governance and accountability for transparency and participatory planning', projects do not have much in common. This is illustrated for instance by the fact that projects did not lead to the development of joint research outputs, or that projects do not appear to have fed into similar thematic on-line platforms hosted by the IIEP. This said, we have not observed any competition across the different projects in terms of issues tackled or targeted stakeholders.

The lack of stronger linkages between R&D projects should not be interpreted as weakness of the R&D work. The development of links between projects is not identified as a pre-condition for IIEP to reach its objectives, and was never part of the original project/portfolio design. In other words, coherence across projects was never an intended goal for the IIEP.

In terms of external coherence, the evaluation did not identify any instances where other similar projects had been conducted by external sources, which would have been detrimental to the work conducted by IIEP. The only example of a similar project having been conducted outside of the IIEP related to a UNICEF project on Open School Data, called 'Data Must Speak'. It is worth noting however, that the IIEP Dakar office did contribute to this project in collaboration with UNESCO. The Dakar office liaised with the team responsible for conducting the Open Data project within IIEP and the information stemming from this project was referenced in the regional state of the art Africa report published by IIEP as part of the Open Data project.

4.2 Coherence of IIEP's R&D activities with other IIEP activity pillars

The most critical dimension of IIEP R&D coherence lies in the links with other pillars of the IIEP i.e., technical cooperation and training/capacity building. According to the 9th MTS "IIEP's research provides critical inputs into educational policy, practice and debates. It also provides the evidence base for its training, coaching, technical assistance and policy advising". On this basis, as well as on the basis of the thoughts shared by interviewees, coordination and cross-pollination across all three pillars is seen not only as a desirable approach, but actually a necessary pre-condition for the success of all three IIEP functions. In particular, the capacity to translate research into policy decisions is in many cases dependent on the use of the research in the framework of technical cooperation and training. The idea behind hosting the three functions within the single institute is to create a virtuous cycle whereby the results of all strands would feed into each other's work and planning. According to one interviewee "if it all works smoothly and it is better coordinated, then the quality of research is probably going to be better".

The importance of making an adequate connection between research and education was mentioned by several interviewees. According to one member of the IIEP team,

"There is a holistic approach to capacity development which has different layers: training individuals, organisation building (becoming change agents in their organisations) and then organisations interacting in their institutional environments. What (IIEP) tr(ies) to do is really to act on these different layers, of course to different extents. If you look at it that way, then you understand that when it comes to research and development, there is no linear relationship between doing research, and doing training. But also acting on organisations and acting on institutional environments".

The value of connecting research to technical cooperation has also been clearly highlighted in the interview campaign. According to one representative, research can often times be performed in better conditions, and is more likely to lead to tangible policy changes, when it is conducted in the framework of a policy dialogue. This can be driven by the work done by the technical cooperation team of the IIEP.

The existence of cross-pollination between the three pillars is deeply embedded into the overall rationale, value proposition and strategic vision of the IIEP. The need for coordination is especially important given the sometimes-artificial boundaries between the work of the three units: in some cases, research work bares a strong resemblance to the work done by technical cooperation for instance. A lack of coordination among functions can not only represent a missed opportunity for the IIEP to successfully achieve its mission, but it also brings into question the overall relevance of maintaining all three functions within a single institutional umbrella. This is particularly true in light of the very strong resource constraints faced by the IIEP as a whole, and the challenge posed by the need to increase the share of extra-budgetary resources to support the implementation of IIEP's work.

The evaluation has shed light on a key weakness of the R&D work, and of the IIEP as a whole. In particular, we have observed a very limited level of coordination (programmatic and practical) across the different IIEP pillar teams and projects. The instances in which the R&D has led to the development of products and activities which have directly fed into the technical cooperation and training components of the IIEP are few and far between. This assessment is shared not only by people within the R&D team, but also by members of the technical cooperation and training teams as well.

The factors explaining this divide among IIEP pillars appears to be several-fold:

- The restructuring process the IIEP underwent at the launch of the 9th MTS, which organised teams by activity pillars, is perceived by some to have been detrimental to efforts to pursue cross-pollination among IIEP's strands of work. In their view, while the new structure has allowed to better organise the work conducted within single pillars, it has limited the levels of interaction and communication between members of the different teams as well as the capacity and incentives for researchers to engage in technical cooperation and training. In addition, the mobility of individual staff members across different teams is limited, despite the fact that IIEP makes it explicit when hiring new staff that they are expected to contribute to all strands of IIEP work.

- There are not real incentives for IIEP researchers to contribute or participate in the activities carried out by other teams or pillars. For instance, the development of training material on the basis of research project results seems to rely exclusively on the initiative/willingness of the researchers themselves, with no formal incentives for them to do so. The instances in which training materials have been developed have been attributed to the pro-activity and interest of project managers. On top of this, some individual researchers are more or

less inclined to engage in technical cooperation and training activities. According to one IIEP representative, it is important to acknowledge that IIEP researchers spend an important amount of their time delivering training activities[22] (e.g., IIEP's Advanced Training Programme, online courses, etc.). R&D staff members are also involved in technical cooperation activities. In addition to this, ensuring that they are able to deliver their research projects while also conducting training activities and technical cooperation projects represents an important challenge, given the limited time and resources they have at their disposal.

- The differences in the profiles of the people in the different areas e.g., technical vs. academic.

- The lack of programmatic coordination across all pillars allowing to define areas of work or specific projects where collaboration is expected. The development of the research agenda was not developed in collaboration with the other IIEP technical cooperation and training teams. The 9th MTS is not explicit about the areas or projects where collaboration is intended to take place. There appeared to be strong differences in the thematic clusters being addressed within the TC team and the R&D team during the 9th MTS.

- A lack of communication and knowledge sharing instances which would allow the different teams to be more informed about the work being performed and potentially identify areas for collaboration. One member of the training team mentioned the possibility of including a representative of the R& R&D in the training programme's M&E committee for instance.

This said, there are some examples which have been identified of successful collaborations between the R&D pillar and the capacity building pillar. One of these is explored in depth in one of the deep dives focusing on the training developed in the framework of the IQA project. In this case, there has been much praise for the quality of the training course developed on the basis of the research projects, not only given its capacity to disseminate the findings beyond the immediate circle of project participants and beneficiaries, but also given its capacity to use the knowledge to generate actionable change. According to one interviewee "the (IQA) training approach is very pragmatic and helping (participants) learn *and* implement these practices in their institutions. Here there is some success in making actionable change in the practices of those institutions. The kind of support that is provided to participants is quite at a high level". Given the ongoing nature of IQA trainings offered by IIEP (two e-learning courses on IQA are planned for 2021: one for all universities in Tunisia, one for African and Asian universities participating in the NORHED-2 programme), it can be expected that additional actionable change can be achieved in the future.

In the School Grants project, the findings were integrated in the 2-week specialised course on decentralization delivered by IIEP staff. School grants were used as a case study for analysing the design and implementation of a decentralisation policy. The Open School Data project also integrated some of the project findings into training materials, such as a recent on-line course on transparency and the course on school mapping which includes reference to open school data. In the case of the Teacher careers project, the research results were picked up in technical cooperation, and the IIEP is currently speaking to the Indonesian Ministry of Education to potentially develop a TC project on this basis. The results were also integrated in IIEP's

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[22] The evaluation team was not provided with data on the time spend by IIEP researchers on different types of activities, so this statement cannot be confirmed by the evaluation team.

specialized course on teacher management (EPM 312) and IIEP BA integrated them in its virtual training programme on teacher policies (i.e., one of the four course components focused exclusively on Teacher careers drawing directly on products from the research).

In some cases, research project results have been built into some of the training activities delivered by the IIEP, once the research projects have concluded. For instance, IIEP's training courses were updated with content stemming from the School Grants project.

5 Efficiency of IIEP's R&D activities

The efficiency of a programme is generally measured by comparing the programme's results to the inputs (i.e., financial, human) that went into generating those results. The aim is to measure the proportionality of the resources invested into carrying out a policy action, with the actual achievement of that action. In the context of this evaluation, the assessment of efficiency has represented a particular challenge given the lack of detailed and complete data regarding the resources allocated to the implementation or R&D activities during the 9th MTS (see section 1.3). In spite of this, the evaluation team has attempted to measure the value for money of R&D work base on a more qualitative approach. In addition, this section explores whether the organisational structure of the R&D function, as well as the partnering approach adopted during this period, have been conducive to the reaching of initially established goals.

5.1 The value for money of IIEP's R&D work

First and foremost, the funding available for the IIEP's R&D work is small in comparison to a number of other international research programmes and there are ambitious objectives set out in the Theory of Change. In 2016, the Governing Body highlighted that the formulation of the MTS Short-Term Outcomes (STOs) may be too ambitious because they involve behavioural change for which IIEP cannot be held accountable and because it is very difficult and expensive to get reliable monitoring and evaluation (M&E) data on these types of behavioural changes. This is evident in this evaluation and does not help with the measurement of value for money.

However, if value for money is seen as more nuanced, we can create a picture of different types of value for money which are evident in programme design and project execution. The following are based on those used by the FCDO in the UK and adapted accordingly:[23]

- Economy: are research project inputs of the appropriate quality at the right price (planning, staff, consultants etc.)?
- Efficiency: how well are the inputs being converted to outputs (spending well)?
- Effectiveness: are the outputs produced by the research having the intended effect on educational planning (spending wisely)?
- Equity: How fairly are the benefits distributed – is it reaching the poorest and targeting woman and girls (spending fairly)?

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[23] Based on FCDO's 4 E's for VfM

The following table gives an overview of elements of Value for Money which can be looked at for IIEP Research, taking into consideration the data that has been made available and collected during the evaluation.

Figure 12 VfM in IIEP research

VfM practice	VfM category	Evidence
Strategy formulation	Efficiency Effectiveness Equity	+ Financial allocations are aligned with the 9th MTS ambitions and linked to expected results + Gender and equity are key aspects of the strategy under the 9th MTS
Staff costs	Economy	+ Not precisely known, but account for two thirds of the budget, mix of junior and senior staff) + Workshops are undertaken with staff to improve administration within the organisation
Cost recovery	Economy	- Cost recovery was not practiced under the 9th MTS, except, where cost recovery took place for the IQA project online courses and the School Grants project funded by GPE.
Understanding of beneficiary types and ability to target	Efficiency Equity	- The communication strategy under the 9th MTS did not clearly tackle target audiences with respect to differentiated beneficiary types - There was very little evidence on consideration of gender equity within the research projects, however there is a wide country coverage
Projects aligned to strategy and well described	Effectiveness Efficiency	+ Clear alignment of the projects with the strategic objectives + Research proposals are available + Budgets included (where relevant) + Objectives setting available
Suitably sized projects	Economy Effectiveness	+ There is a clear rationale for the budget allocation to projects with well-defined methodologies set out to reach the objectives
Theory of change	Effectiveness	- The programme under the 9th MTS did not have an explicit ToC at the outset linked to the overarching ToC for IIEP. There was however a general programme logic map. + All research projects can be linked to the MTS (TC has its own ToC) - The MTS set ambitious impacts in comparison to the resources
Outcome and impact indicators relevant and robust	Effectiveness	- KPIs set at the level of IIEP not research - The performance framework does not include any indicators to specifically capture R&D activities
Communication	Effectiveness	+ High level of dissemination of research outputs at policy forums + Good use of the national experts as conduits for dissemination - Less well-developed overall communication strategy for research and development, which is not systematically embedded from the project outset - Not clear on budgets specifically related to dissemination / comms (decentralised elements)
Commitment of partners	Efficiency	- Low level of donor partnerships overall + The extension of projects such as School Grants with the support of GPE

VfM practice	VfM category	Evidence
		+ The support of the national governments and ministries (e.g., Australians, Chinese and Philippines) in organising Policy Forums, national dissemination events, and case studies
In country capability and commitment	Efficiency	+ Use of in-country experts, lessening cost of performing research + Working relationships with national experts + The support of the national governments and ministries (e.g., Australians, Chinese and Philippines) in organising Policy Forums, national dissemination events, and case studies
Learning	Effectiveness	+ IIEP is a learning organisation, with built in monitoring and evaluation - The 9th MTS had less cross fertilisation across the pillars of the IIEP - The evaluation may be late for influencing the next strategy, although the 11th MTS is still being defined

For economy, staff and training costs were key inputs for the execution of the projects under the 9th MTS and represent around two-thirds of the budget. As shown in section 1.3, the total budget allocations for each area varied significantly, with the largest share of budgets being allocated to case studies and consultants in more cases. A significant amount of the budget is allocated to the actual research work which would indicate an economical approach is taken. In the case of Open Data and IQA for example, cases studies were all allocated the same budget, which was quite modest. Additional investment was also acquired from external governments. For example, the French Ministry of Foreign Affairs allocated budget to carry out the regional state of the art paper on open school data. The majority of the budget is staff time. In the case of School Grants, there was external funding available from GPE but internally just two staff and one consultant involved in the process. IQA is equally lean in terms of staff and had only a small budget for its work. There is clear pressure on staff with regards to workload which although might be positive in terms of value for money has a much higher negative effect in terms of stress, and reduction in time for reflection and learning.

In terms of efficiency, at the strategic level there is a clear link with the strategy and the planning for research projects. The process of translating the strategy to planning and implementation appears to have worked well. The direct implementation of research by the IIEP means there is a high degree of control over spend. Although there are a small number of partner organisations (less efficient), those which are active have good links with the IIEP research, in addition the in-country experts add an important and efficient source of research capacity (although this could be further increased). The understanding of the beneficiaries (segmented) is not evident at a holistic level within the 9th MTS. There is good engagement at the national level through the projects, but this tends to be linked to the final research outputs.

Effectiveness in terms of whether the outputs were leading to the intended effect is looked at in detail as part of this evaluation. As highlighted, the objectives were ambitious with respect to the intended effects. In spite of the weakness, there is evidence of the outcomes emerging as stated in the ToC (designed for this evaluation). There is information from the "deep dives" of programme effects which would support the effectiveness of implementation. There are no programme level KPIs specifically linked to the research projects. Communication can enhance the effectiveness of the programme and this was less well developed under the 9th MTS but improving.

Equity is the weakest element reported in value for money. Although at the strategy level aspects of gender equity are given equal status to other major objectives, the implementation of the research projects shows this is given less attention.

5.2 Efficiency of the existing funding model of R&D activities

As explained in previous sections, IIEP's R&D activities were heavily dependent on budgetary sources of funding (as opposed to extrabudgetary sources). A share of the budgetary resources is provided by the UNESCO 34 C/5 programme and budget, while the other share is provided by voluntary contributions from donors. On top of this, R&D activities are also partially funded through extrabudgetary sources, a significant share of which are provided in kind by IIEP project partners (e.g., the organisation of a local conference). Some projects also managed to attract funding from third parties through research grants (e.g., GPE for the NEA and the School Grants project). However, the extra budgetary funding for R&D is a much smaller proportion than for training and technical cooperation. In addition, the R&D function does not conduct cost recovery of staff time, as is the case of the work conducted through technical cooperation (in the case of NEA and Scool grants project, both were funded by the GPE and so there was staff cost recovery).

In the lead up to the 9th MTS, IIEP had been under financial pressure given that UNESCO had reduced its contribution to the Institute. In the Governing Board papers at the beginning of the 9th MTS board, members discussed the reduced contribution to the IIEP from UNESCO which represented a paradox since as an institute of excellence it is a high priority for UNESCO. As a result of this, the beginning of this period saw a restructuring and redeployment programme to cope with the financial constraints due to budget reductions. One of the key actions taken by the IIEP included the downsizing of its research portfolio, to concentrate its resources on a smaller number of projects.

At the start of the 9th MTS board members advised the IIEP management to develop a fund-raising strategy and expand and seek new partners in additional countries. Fundraising has remained difficult and under the 9th MTS there was little fundraising outside of policy events for R&D.

There was however some cost sharing with countries agreeing to cover some of the costs of the projects. Examples include for the Open Data for education project where for the Australian study visit, a cost sharing agreement was agreed with the Australian partners. The policy forum in Manila also benefitted from local costs being taken care of by local government. In both cases there was a clear partnership between IIEP research and the country. For the National Education Accounts and the School Grants project there was a grant received from the Global Partnership for Education. This steered the decision on country coverage. IIEP also worked closely with the Pole de Dakar and the UIS who also provided funding. School Grants also received funding from the Global Partnership for Education. Despite its limited budget, the IQA project managed to raise funding from several governments (China, Bahrain, Chile) for national and international dissemination events. There was also a contribution in kind from the participating universities in terms of support for the case studies, as the budget allocation for each case study was quite limited.

Overall, the high level of dependence of R&D activities on budgetary resources represents a risk for the long-term sustainability of the R&D function. This high level of dependence makes it very vulnerable to additional budget cuts stemming for UNESCO and voluntary donor contribution. To reduce this risk, the IIEP has several options:

- **Increase its fundraising acumen** in order to bring in additional contributions from voluntary donors (earmarked or not earmarked for R&D activities, themes or specific projects).

- More pro-actively seek to obtain **research grants** to conduct research projects. This can be done by developing research proposals for competitive grant funding programmes or mechanisms.

- **Conduct research in collaboration with other research partners**. This can be done through the development of institutional partnerships with organisations (e.g., international organisations, universities, international networks) who are interested in performing similar R&D.

- Hosting **third party researchers or post-docs** within the IIEP. Such as scheme would allow the IIEP to host researchers being funded by external organisations and sources, to conduct research which is in line with IIEPs research agenda. Research results could be published under the IIEP banner, and used in other lines of IIEP work. In return, IIEP would offer these researchers access to networks, a platform to conduct their research, other researchers to review or mentor them in the process.

- Systematically apply **mandatory co-financing** by research project partners and beneficiaries in the selection and the implementation of the R&D projects. For instance, before agreeing to launch a project, IIEP can ensure that 20% or 30% of overall costs will be covered by the beneficiary countries or project counterparts. Exceptions could be made for low income country projects. This is a particularly promising avenue as it also shows that UNESCO Member States also see the relevance of the research for their country.

- **Outsource the research to external researchers**. This would allow to a) increase the availability of IIEP staff and researchers to oversee projects and b) lessen the costs of performing research. Under the 9th MTS while a good share of work was performed by external individual experts or researchers, IIEP researchers (i.e., staff) remained heavily involved in conducting the research work and presenting research outcomes (and quality assurance). This has direct implications on the cost structure of projects given that IIEP staff costs are comparatively higher than the costs of external individual researchers. Other organisations, including several in the UNESCO constellation, are now increasingly recurring to this 'outsourcing' model which if correctly managed, can yield high quality results at a reasonably lower cost. However, this alternative may also bring about negative spill-overs such as the de-skilling of the IIEP team, or could also lead to drops in research quality.

- Implementing a **cost recovery model**, in a similar fashion to the model implemented by the TC pillar. Cost recovery can also come from the R&D results feeding into training programmes and technical cooperation (which are geared towards cost recovery). This further reinforces the importance of connectedness between the functions.

In practice, the solution to this challenge will probably come from the implementation of a mix of these solutions. However, from the evaluators' perspective, implementing cost recovery does not appear to be a feasible solution in the short term given the nature of R&D work. However, cost recovery could be envisaged if the R&D work is conducted in the framework of specific technical cooperation projects / work.

Last but not least, a more fine-tuned project financing monitoring system should be put in place for the purpose of more adequately steering the R&D function of the IIEP. This evaluation has shed light on the difficulties and challenges to obtain a clean and clear overall picture of R&D project funding sources, and overall project financial performance.

5.3   IIEP's partnering approach

According to 37 C/5: IIEP will strive to develop regional approaches for the implementation of its programmes. This will allow the Institute to deepen its reach and mobilise partnerships to

create synergies and multiplier effects with other actors in education development, including other UNESCO entities.

There are two broad partnering approaches to consider. There were the formal partnerships relating to the funding, and the partnerships with in-country organisations who were taking part in, or aligned to, the research. From interviews, it is evident that partnering with other organisations (at both levels) enriches the experience and provides intellectual exchange. This is most evident at the country level as part of research, but also happened to some extent at the funding level. There is no one clear approach to partnering (at either level).[24]

GPE (Global Partnership for Education) was the main funder was the main funder of the School Grants research and the National Education Accounts. For the School Grants project, GPE was not an intellectual partner, but supported the funding and had a role in the decision for country coverage. It was not possible to find someone to interview at GPE on School Grants and no evidence was found of GPE's take up of the research results or dissemination. GPE took a different role as a funder of the National Education Accounts, with human resources provided through two senior education specialists. The team also included UIS at UNESCO and the outputs of the research were disseminated by both GPE and UIS. Where there were no partners at the funding level, such as for Teacher Careers, the team can now reflect back since there is a partnership under the 10th MTS to see the additional benefit gained from working with another organisation in the planning, execution and dissemination of the research. During the 9th MTS the OECD peer reviewed the final synthesis of the project and subsequently referenced the research in their own publication.

At the country level, cooperating with IIEP research is seen as important and highly valued. Being associated with the process and the outcomes is viewed as beneficial for organisations in-country. The links with the staff at the IIEP are well developed at a personal level with many of the interviewees referring to staff by name. There is an intense period of engagement during the research set up phase and as a consequence, enduring relationships are made in country between IIEP research, and the country level organisations and researchers involved. IIEP research benefits greatly from the local institutions in terms of the knowledge, networks and contacts. This was evident in, for example, the open school project where there were links to education managers, EMIS specialists, and civil society organisations. All the research projects are well designed to manage the information flow between IIEP Research and the in-country researchers and organisations. There are also examples where the research has been extended by additional funding at the country level. For IQA the Chinese Higher Education Evaluation Centre (HEEC) was concurrently launching a national project on IQA development, and was therefore keen to participate in an international research project. The Chinese HEEC accepted to fund a university to be included in the research and to support the organisation of the International Policy Forum. NORHED also funded one online course on IQA and has agreed to fund another course to be organised during in second semester of 2021. The World Bank is currently funding the development of the French version of the IQA course to implement an action-training programme on IQA for Tunisian universities. This type of initiative illustrates the potential for research projects to generate external funding opportunities, by capitalising on the results via the development of training activities.

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[24] The regional offices are covered in section 3.3.6

In general, it is important to underline that research projects can generate also a posteriori funding, when they lead to the development of training courses (this being the case of the IQA project).

Partners are actively engaged in the dissemination phase of the research, being present at seminars and other events.

Taking a partnership approach, both centrally and at the country level is beneficial for IIEP's research:

- It further supports the sustainability of the work, as highlighted in the previous section on funding models (lessening dependence on budgetary funds).

- At the country level, it can represent an avenue for increasing the funding for research projects.

- It provides additional legitimacy through partnering with other major organisations with strategic goals in the area of educational planning.

- It also provides legitimacy for the research process when partnering with national players, who have influence over implementation.

- It supports value for money

    - similar research priorities can be combined

    - efficiencies can be made in the wider pool of researchers available

- For in-country research in can also improve the translation of research results into activities.

5.4   The IIEP R&D performance monitoring systems

During the 9th MTS, the IIEP implemented a two-tiered monitoring system:

- The IIEP used a detailed set of 20 KPIs to report to its Governing Board on a yearly basis. Some of these indicators related directly or indirectly to the R&D function of its work.

- In addition, the IIEP reported on its contribution to 37 C/5 performance indicators to UNESCO's General Conference via UNESCO's dedicated online platform, SISTER. The IIEP also provided narrative reporting to UNESCO twice a year that fed into document EX/4 Programme Implementation Report. Logically, the reporting to IIEP's Board was more detailed than the high-level reporting to UNESCO.

The UNESCO-level performance indicators don't provide a sufficient level of detail to understand the extent to which the IIEP's R&D function reached their ambitions. As such, this evaluation has focused exclusively on analysing the performance indicators used to report back to the Governing Board (see section 3.1).

As already mentioned in section 3.1 of this report, the 9th MTS failed to put in place a robust and reliable performance assessment system for its R&D activities. Monitoring was limited to a handful of indicators which fail to capture the breadth and actual results of R&D activities. In addition, the framework did not provide insights on the share of IIEP inputs, outputs or outcomes which directly or indirectly benefitted Africa or contributed to bridge the gender gap. The IIEP did however perform more regular, albeit simple, qualitative reviews of project implementation/progress in the yearly progress reports provided to the Governing Board.

Performance assessment frameworks were not implemented at the project level. As such, there are no specific targets or yardsticks against which a formal assessment of projects can be performed. The lack of project-level monitoring data directly impacted the institute's ability to account for the results generated by the funding it receives, as well as to illustrate the extent

to which its intervention logic is functioning as planned. This said, the IIEP did provide regular reporting to its funders.

Finally, activity-level performance or satisfaction assessment could have also been greatly beneficial to the IIEP's R&D function during the period. Given the nature of the work and activities performed by the IIEP, a more systematic and widespread use of tools such as satisfaction surveys, follow up surveys, data analytics would have greatly improved the institute's capacity to better understand the short and mid-term changes and uptake of the knowledge that it is generating and disseminating. These are all simple and low-cost solutions which could considerably improve the understanding of what is generating change, and how things can be improved moving forward. Of course, these solutions would not be able to account for the longer-term policy changes introduced as a result of IIEP R&D work, which can only be captured through impact evaluations.

It is the evaluation team's understanding however that this situation has been considerably improved under the 10th MTS and the R&D team is currently in the process of updating the monitoring framework and procedures for the 11th MTS.

6 General findings and recommendations

6.1 Relevance and coherence

Despite the lack of a formal and structured research agenda procedure, the evaluation has shown that the R&D projects conducted under the 9th MTS were very relevant and covered a range of issues considered to be of high importance to educational planning. There is good evidence to show that the work being done by IIEP Research is adding to a body of knowledge in areas where research is lacking, and capacity building is needed. This said, there is a need to ensure that better use is made of the knowledge and intelligence in other IIEP departments (linking to the other pillars of activity of the IIEP and wider within UNESCO), the regional offices, and improve the engagement of the Research Advisory Council, thus strengthening existing mechanisms.

Projects were well designed by the corresponding project managers. In every instance, there is a clear explanation of the specific challenges and needs to be addressed, as well as of the rationale behind the selection of target countries and activities to be implemented. Projects were grounded on strong collaborations with partner and beneficiary country representatives. This said, the project design phase could have further benefited from an earlier involvement of IIEP communications and dissemination team representatives, in order to further embed communications actions into project goals and work plan. The development of project-level performance assessment frameworks as part of the design phase would have also been beneficial to the steering of these projects and their accountability.

Table 7 Recommendations on relevance and coherence

Key finding	Recommendation
The need to improve and strengthen the research agenda setting process	**Recommendation 1:** Ensure better use is made of the knowledge and intelligence in other departments (linking to the other pillars of activity of the IIEP and wider within UNESCO), the regional offices, and improve the engagement of the Research Advisory Council in agenda setting.

Key finding	Recommendation
The need to better align R&D activities with UNESCO strategic objectives and global priorities	**Recommendation 2:** The IIEP should take a clear position on if and how it wishes to address major UNESCO global thematic priorities (e.g., Africa, SIDS, gender equality, youth) through its R&D function and project selection mechanisms. Based on this decision, the adequate performance should be adopted to reflect progress towards goals relating to these priorities.
The need to strengthen linkages and cooperation between the R&D, training and technical cooperation strands of IIEP	**Recommendation 3:** Measures should be taken to ensure a higher level of cross-pollination between the work conducted by the R&D function and the training and technical cooperation function. The uptake of research findings in training and technical cooperation activities can greatly enhance the IIEPs capacity to generate tangible policy changes and strengthen educational planning and management human and institutional capacities.
The need to further involve the Research Advisory Council in ensuring IIEP's R&D quality	**Recommendation 4:** The IIEP should take steps to review and update the expected role and contribution of the RAC, and ensure that it's more pro-actively involved the development of the research agenda and the review of R&D projects, while strengthening the foresight dimension of IIEP R&D work as established in the RAC Terms of Reference.

6.2   Effectiveness

All projects are found to have been very successful in the delivery of their activities, and the achievement of their expected outputs and immediate outcomes (please refer to the R&D function's ToC found in section 1.2). The majority of the projects were delivered according to the original plans, with only very minor adjustments having been introduced to the types of research outputs produced[25]. In some cases, projects have even delivered more outcomes than originally foreseen (e.g., IQA). The majority of the major risks and threats to project implementation have been effectively managed and mitigated in the framework of the projects.

There is also ample evidence regarding the projects' ability to ensure that the results of the research projects, and the potential policy implications, reached the eyes and ears of the key policy makers and educational planners, both within MoE as well as other public sector branches (e.g., statistical offices, ministries of finance). It is worth noting that in many instances, projects also disseminated results and collaborated with other in-country stakeholder groups such as teachers' unions and civil society. Projects used a range of vehicles to disseminate these findings to the circle of stakeholders in direct beneficiary countries which included policy fora, the dissemination of publications, and shorter communication pieces. In some cases, projects have successfully built training activities on the basis of the research outcomes, which has allowed them to convey practical implications in a more impactful and broader manner.

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[25] The teachers' careers and open school data are reported to have faced important time lags in the delivery of their work plan.

In some instances, local partners also took it upon themselves to disseminate key findings via, for instance, local news and communication outlets.

The influence of IIEP's work on the global discussion on educational planning is generally acknowledged by stakeholders, but there is little hard evidence to back this statement. In some cases, IIEP research was clearly taken up by other major international players in the work they conducted on education-related issues. This was for instance the case of the Teacher careers project that led to the uptake of information and evidence by the OECD. There is good reason to believe that some of the key findings generated by IIEP may have influenced the thinking and design of other development and research operations conducted by international organisations. The likelihood of this being the case is high because of a) the innovative and ground-breaking dimension of some of the key findings (e.g., NEA data on country education spending) and / or b) the fact that IIEP research was focusing on areas which had recently gone unexplored in such a detailed manner and through an international comparative approach. As a result of the latter, IIEP can be effectively considered to have been a standard setter of many of the issues it explored during the 9th MTS.

The IIEP can take additional measures to try to better understand the degree of innovativeness of the issues and it is exploring through its R&D work as well as the level of uptake of its findings by other major organisations and research institutions. This can be done for instance through more thorough bibliometric analyses of IIEP research products and publication activities. Tools such as Overton also allow to conduct impact and uptake analyses of specific publications. The IIEP library already collects information on citations of IIEP work for the Governing Board.

The dissemination of the research results, as well as the actual implementation of the research activities through collaborative approaches, has contributed to the enhancement of human and institutional capacities in the field of educational planning, in beneficiary countries. The strengthening of capacities is particularly visible in instances where training has been designed and delivered in the framework of the projects (e.g., IQA). In many cases, IIEP research has also acted as an important 'eye opener' when it comes to key policy trends and the functioning of educational systems. The projects have in many cases shed light on issues which had previously gone unexplored or for which very little data and hard evidence was available. This in turn contributed to changing some fundamental policy paradigms, or to improving the level of policy 'readiness' of countries wishing to adopt new educational planning policy solutions or approaches.

In spite of this, the evaluation has only identified a small handful of examples where IIEP research can be directly linked to the taking of a specific policy decision. In the majority of cases, IIEP research has influenced policy thinking and understanding, as well as the level of collaboration of different policy agents. Yet, this has not necessarily translated into identifiable and tangible policy changes. As such, the assertion that IIEP has effectively contributed to the achievement of its intended final outcomes and impact cannot be made on the basis of the evaluation findings.

In the view of the evaluation team, the types and number of policy changes linked to IIEP research are commensurate to the types of research being conducted, and the level of effort/resources being invested by the institute. Policy changes – particularly in developing context – only tend to happen after several iterations and on the basis of multiple sources of information and evidence, as well as through complementary activities such as dissemination and training. The IIEP by itself cannot be held accountable for generating policy change in such complex environments, particularly in light of the relatively modest resources it has to trigger such change.

The extent to which IIEP research is influencing policy thinking in countries which are not directly involved or benefit from its research projects is a major blind spot of the institute. There is very little data or evidence regarding the level of use and uptake of produced evidence in the broader UNESCO Member State community. This said, there have been many instances where research results have been presented outside of direct beneficiary countries.

IIEP's research activities have made an effective contribution of the Africa global priority, and have focused much of their efforts on improving the availability of evidence and the body of knowledge on educational planning in the region. The contribution to the Gender Equality priority however remains much more modest, mainly because of a lack of resources and expertise on the subject.

The evaluation has shown that the IIEP got many things right when it comes to the implementation of its ToC, particularly in terms of the basic pre-conditions and supporting factors which are necessary to the achievement of key goals. For instance, there is clear evidence regarding the fact that projects and project goals are context relevant, and that the research is to a certain extent demand driven. Research is also being conducted by highly qualified individuals, in line with international best practices and scientific standards. In the process, research teams have managed to ensure high levels of support, buy-in and involvement by local stakeholders.

Some of the weaker links in the causal chain relate to the need to involve the Research Advisory Council more heavily in the promotion of IIEP research quality, but most importantly, the need to develop stronger linkages and collaborations with other pillars of IIEP work. The 'three pillar virtuous cycle' which is at the core of the IIEP DNA was clearly not on display during the 9th MTS. Additional measures could be taken to diversify the types of research outputs and dissemination channels being used, to make them even more appealing and actionable, from a policy maker's perspective.

Table 8 Recommendations on effectiveness

Key finding	Recommendation
The need to better plan and implement a multi-model communication approach (from the beginning of the research) to satisfy a wider range of audiences and make the research findings more actionable.	**Recommendation 5:** Although the research reports, case studies and policy briefs are the most important outputs of the research, in order to better reach a wider non-project beneficiary audience, the recent work on audience segmentation, coupled with the data on use of the current media mix should be used to inform the next communication strategy. This will allow the IIEP to tailor its communications approach using a diverse set of tools and channels for delivery, which is much more targeted.

6.3   Efficiency

The issue of financial and organisational sustainability should be at the heart of discussions on the future of the IIEP R&D function. The evaluation has shown that while the overall value for money of the function is high, the high dependence of the function on budgetary resources represents a key threat to its long-terms sustainability, as well as to the goal of developing a more ambitious and impactful R&D agenda. The IIEP needs to ensure that this issue is clearly tackled in the next MTS.

From an organisational perspective, the IIEP could also do more to ensure that the impact of its research is higher, and that additional external resources are leveraged in the pursuit of its R&D ambitions. A more effective and ambitious partnering strategy could be part of this solution to this challenge. Internally, the IIEP needs to ensure a more coordinated approach to its research programming across all teams, including the communications team. The role of the Research Advisory Council also needs to be reviewed and formalised, making its role more central and dynamic.

Finally, measures need to be taken to ensure that the IIEP's R&D performance monitoring framework is strengthened and adapted to its work.

Table 9 Recommendations on efficiency

Key finding	Recommendation
The need to diversify funding sources and enhance financial sustainability of the R&D function	**Recommendation 6:** IIEP can explore several avenues to diversify its sources of founding: • Increase fundraising acumen in order to bring in additional contributions from voluntary donors • Pro-actively seek to obtain research grants to conduct research projects • Conduct research in collaboration with other research partners • Host third party researchers or post-docs within the IIEP • Apply mandatory co-financing by research project partners and beneficiaries in the selection and the implementation of the R&D projects • Further outsource the research to external researchers. • Implementing a cost recovery model, in a similar fashion to the model implemented by the TC pillar (or rely on post-project cost recovery, when R&D results are translated into training programmes and TC projects
The need to enhance its partnering approach	**Recommendation 7:** Proactively seek new partners for the purposes of: • Increasing access to funding • Increasing access to research capability • Increasing knowledge on emerging research themes Continue to deepen partnership relations, capitalising on person-to-person communication, co organising of communication activities. Link the partnering model closely to the communication strategy (as an audience).
The need to improve the performance assessment framework the R&D function	**Recommendation 8:** The IIEP should implement a more robust performance assessment framework for its R&D function. The framework should include Specific, Measurable, Achievable, Relevant and Time-bound (SMART) indicators, baseline values and targets for the different components of its ToC. This

Key finding	Recommendation
	framework should be linked to performance frameworks established at the level of individual projects. In order to enhance project-level performance assessment, a more systematic use of satisfaction and follow-up surveys should be performed among activity participants and beneficiaries. The updated performance framework should distinguish between countries who are directly involved and benefiting from IIEP R&D projects (i.e., IIEP direct beneficiaries), vs. those who are not (i.e., rest of the world).

6.4   Looking ahead

The current Covid-19 sanitary crisis did not affect the 9th MTS but has implications for education, and thus educational planning research in the future. Covid-19 has forced school closures in 188 countries, disrupting the learning of over a billion of children.[26] The higher education sector has also been deeply affected. In a recent survey by the IAU,[27] almost all institutions indicated being affected and 60% stopped all campus activities for some period during the pandemic. One important finding from the IAU survey is that partnerships have been particularly weakened for higher education and this may have spillover effects for institutional learning. Therefore, the effects are widespread, and Governments and the education system are in a state of recovery, including future proofing against the likely ongoing disruptions. In addition, it is unlikely that education will return to the previous status quo as lessons learned from the Covid-19 crisis will impact on planning for the future.

This represents an opportunity for the IIEP's research programme, but also means that as the future is uncertain, the mechanisms for agenda setting need to ensure that the emerging needs are documented and assessed in order to adapt and adjust research programming.

Looking into the current concerns of the education systems, there are some dominant trends:[28]

- The changes in teaching and learning models (incorporating distant and blended learning), and the subsequent need for additional skills in educators (thus affecting their career paths)

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[26] https://www.oecd.org/coronavirus/policy-responses/education-and-covid-19-focusing-on-the-long-term-impact-of-school-closures-2cea926e/

[27] First Global Survey Report on the impact of COVID-19 on Higher Education around the World. https://www.iau-aiu.net/COVID-19-Higher-Education-challenges-and-responses

[28] A comprehensive source of information on the effects of Covid-19 on Higher Education has been compiled by DAAD https://www.daad.de/en/information-services-for-higher-education-institutions/centre-of-competence/covid-19-impact-on-international-higher-education-studies-and-forecasts/#Global%20and%20cross-national%20analyses. In addition, Technopolis has just completed the mid-term evaluation of SPHEIR, for the FCDO which explored the effects of Covid on HE institutions in SSA, Myanmar, Lebanon and Jordan.

- The general need for digital skills within educators and students alike
- Quality assurance systems, and in particular the issues of examination and assessment in the digital space
- Equity and inclusion, the vulnerability of students from diverse backgrounds in receiving support and extra services
- Educational outcomes in general, and the worsened learning crisis in general
- Foresight related activities to understand the educational experience in a post-Covid world
- Mental health effects of education disruption and isolation on young people
- Funding allocations across the education system to support new constellations of education provision (and thus an understanding of funding)

It is likely that IIEP will see a number of its partners dealing with these new challenges, amongst others. IIEP is in a strong position, in cooperation with its partners, to support the education systems through research. One risk is the fast pace of change needed. Education needs to adapt quickly and smartly to its new future, and cannot wait for long term research projects to be completed and disseminated. The need for robust and sound research output to support immediate needs is pressing. In particular in relation to foresight and exchange of good practice, something which the IIEP is well placed to take a central role.

Appendix A   Evaluation matrix

Evaluation question	Operational questions
Relevance	
A– On what basis, through which process was the research content of the previous and existing MTS agreed upon?	What internal process/discussion/consultation took place to set IIEP's research agenda? Were external stakeholders involved? How were they involved?
	To what extent were the outcomes of this process/discussion/consultation translated into research priorities?
	What were the procedures and conditions for screening and assessing the relevance and quality of the research projects?
	How do stakeholders (all) view the relevance of IIEP's research content to country needs?
	To what extent are IIEP's research projects' outputs and results aligned to IIEP's R&D priorities and objectives?
	Are there any significant gaps in the funded research portfolio in relation to the research priorities set in the MTS 2014-2017?
Effectiveness and impact	
B– To what extent have the research activities conducted during the last MTS (2014-2017) been successful in being used as evidence in the planning process	To what extent have the research activities triggered policy discussions in participating countries?
	Do key policy decisions on education planning and management practices reflect the findings resulting from IIEP's research?
	Are key findings from IIEP's research reflected into policy priorities and policy documents?
	To what extent are key findings from IIEP's research influencing other stakeholders such as NGOs, academics and funders?
	Are IIEP's projects meeting the impacts and effects that were intended during the design phase of the projects?
C– What factors/elements explain successful achievement in the above areas? What can be learnt from instances where results were not as expected?	Are IIEP's research planning, research implementation and research dissemination processes conductive to informing policy dialogue and strategic documents among partner education institutions? What factors/elements explain successful achievement?
	To what extent has IIEP managed to provoke dialogue in partner countries or helped to define a need for policy development?
	To what extent and how has IIEP worked with policy and decision-makers to translate findings into policy and practice?
	To what extent is research aligned with the demand of partners in educational institutions?
	To what extent do the outcomes and impacts of IIEPs research align with its Theory of Change and results framework?
	In cases where the knowledge generated by IIEP's research is not used, what obstacles/barriers hamper the achievement of successful uptake of research findings? Is this because research was ill-designed or that the perceived need was misidentified?
	How do stakeholders (all) perceive the quality and relevance of IIEP's knowledge products and development products?
Internal coherence	
D– How are research findings feeding into IIEP's technical cooperation and training activities? How are these activities influencing research in return?	What processes did IIEP put in place to induce and explore opportunities for strategic synergies between its research, technical assistance and training work?
	What are the examples of successful synergies that can be highlighted?
	What are the remaining obstacles, if any, to further complementarity and coordination between IIEP's different functions?

Project name	Goals and activities	Target audience	Sources of funding	Geographical areas and countries
Education financing: Improving national reporting systems on financial flows	Launched in September of 2013 by the UNESCO Institute for Statistics and IIEP Pôle de Dakar, the NEA is an information system that produces transparent data on education spending from all sources (government, household, or external funding). The data is used in order to identify gaps in education funding and redirect resources to meet policy objectives. The objective of the NEA is to analyse who finances education, how much is spent, where do funds go, what these funds are being spent on. NEAs can therefore offer evidence on whether resources are allocated equitably and effectively within education systems.	Policymakers	Total budget amount: $US 2,119,074 ($US 1,980,443 activity grant + $US 138,631 agency fee)

Funding from the Global Partnership for Education (GPE)'s Global and Regional Activities (GRA) programme, the UIS, the International Institute for Educational Planning (IIEP) and Pôle de Dakar (all parts of UNESCO | The UNESCO NEA Project started in 2013 and ended in July of 2016. It included 8 countries who are members of the Global Partnership for Education (GPE): Guinea, Senegal, Côte d'Ivoire, Uganda, Zimbabwe, Lao PDR, Nepal, Vietnam. |
| Improving school financing: the use and usefulness of school grants | Since 2010, IIEP has been coordinating a comprehensive research programme on the use and usefulness of grants to schools. Several previous literature reviews and analyses have been conducted on this type of policy by the IIEP and its partners. During the 9th MTS, the research was extended to two new regions, Latin America and the Caribbean and Francophone Africa. The aim was to deepen the research findings and learn from the experiences of other countries in the design and implementation of school grant policies. | Policymakers, education managers | UNICEF (MTS 8), GPE (MTS 9), IIEP Regular programme | Francophone Africa, Latin America and the Caribbean (Democratic Republic of Congo, Haiti, Madagascar, Togo, Honduras and other LATAM countries included in the comparative synthesis) |
| Exploring the organisation and management of Teacher careers | Launched in 2015, this research project provides policy makers and governments with a variety of policy options with regards to the organisation and management of Teacher careers. It examines different types of teacher career models, management implications and perceived effects on teacher motivation, attraction and retention. Teacher career reforms were investigated in varied contexts including Colombia, Ethiopia, Ecuador, | Policymakers, education managers | Regular programme | Latin America, Eastern and Southern Africa, South East Asia, Europe, Northern America |

Project name	Goals and activities	Target audience	Sources of funding	Geographical areas and countries
	Lithuania, Mexico, New York City, Peru, Scotland, the Western Cape in South Africa and Thailand.			
Using Open School Data to improve transparency and accountability in education.	The overall goals of this programme are to: develop an evidence base for the most critical data needed and the most effective open education policies for improving government transparency and accountability in education; help decision-makers and educational managers make informed decisions about the design and implementation of open education data policies, so as to promote transparency and empower citizens to fight against corruption; build the commitment and capacity of civil society organisations, media representatives, in addition to education officials in charge of access to information, to work together to develop access to more practical, effective, and usable educational data. The research addresses the necessary conditions for enabling open education data to promote transparency and accountability in education. The activities included A literature review on the use of open data on education for improving integrity in the management of education systems; case studies on country-specific use of school report cards and lessons learned from these endeavours from a transparency and integrity perspective, 2 state of the art regional papers (Latin America and SSAfrica), and a study Visit to Australia to examine the My School project, International Policy Forum.	Policymakers	IIEP Regular Budget, in-kind contributions from the Government of the Philippines and the Government of Australia.

Financial support from the French Ministry for Europe and Foreign Affairs for the study on use of school report cards (SRCs) in Africa | The research focuses on countries from Asia and the Pacific which have developed innovative projects during recent years in the area of open data in education, including Australia, Bangladesh, India, Indonesia, Pakistan (Punjab province), and the Philippines.* |
| Innovative and effective solutions for internal quality assurance of higher education: what are their effects on academic quality, employability and managerial effectiveness? | Within the context of an international reform movement to set up internal quality assurance mechanism in HEIs, the goal of the research was to generate knowledge in order to provide evidence–based policy advice to national and institutional | HE policy-makers at national and HEI level, QA managers in HEIs | IIEP regular budget, contributions from the government of China, Chile and Bahrain | Asia, Europe, Middle East, Africa |

Project name	Goals and activities	Target audience	Sources of funding	Geographical areas and countries
	higher education leaders on existing innovative and cost-effective solutions for IQA systems in universities. The research comprised an international survey on existing practices and eight university case studies to demonstrate good IQA practices and analysing their effectiveness. The project comprised the organisation of several national forums and an international policy forum to disseminate the findings among policy-makers. The generated knowledge was used to develop an online course on IQA.			
Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires)	Since Information and Communication Technology (ICT) tools have changed the way we interact, the goal of this program is to increase digital literacy (searching, discerning, and producing information). The aim is to develop this digital literacy for both teachers (accessing online resources, individualized teaching, fostering student interaction), and for students (experiment with different styles of learning, inclusiveness, This program was initiated by the IIEP Buenos Aires office and tested in the period 2014-2017 in 4 pilot countries: Costa, Rica, Colombia, Uruguay, and Peru. Each country had a customised program, but similar activities remain: laptops for students, online classes, internet access. There are three main supporting documents for this program: a country report of each program, a comparative study between the four countries	Policymakers and Education Ministries	Unknown	Costa Rica, Colombia, Peru, Uruguay

Project name	Goals and activities	Target audience	Sources of funding	Geographical areas and countries
	(*Revisión Comparativa de Iniciativas Nacionales de Aprendizaje Móvil)* and a conference (August 2016) bringing together main stakeholders.			

Appendix C List of interviewees

A.1 IIEP representatives and stakeholders

	Name	Role	Office
1	Alexandra Waldhorn	IIEP communications officer	IIEP Paris
2	Anton de Grauwe	Leader of IIEP's Unit for technical cooperation	IIEP Paris
3	Aurélia Courtot	IIEP web manager	IIEP
4	Barbara Tournier	Manager of project on Teacher careers	IIEP Paris
5	Chloé Chimier	Member of the teachers' careers and School Grants project team	IIEP Paris
6	Dorian Gay	Member of steering committee, IIEP Paris executive officer (strategic planning and M&E)	IIEP Paris
7	Hugues Moussy	Member of the steering committee. Head of R&D team	IIEP Paris
8	Jacques Lecavalier	IIEP training unit	IIEP Paris
9	Jamil Salmi	Research Advisory council member	IIEP Paris
10	Jimena Pereyra	IIEP training unit	IIEP Paris
11	Koffi Segniagbeto	Head of Office	IIEP Dakar
12	Mercedes Reno	Member of steering committee, BA office executive officer	IIEP Buenos Aires
13	Michaela Martin	Head of steering committee, project manager for Project on IQA	IIEP Paris
14	Mioko Saito	Head of training at the IIEP	IIEP Paris
15	Mr Manos Antoninis	Global Education Monitoring Report Team	Global Education Monitoring Report Team
16	Muriel Poisson	Member of steering committee, manager for project on Open Data, acting team leader during 9thMTS	IIEP Paris
17	Natalia Fernandez	Member of the ICT for education project	IIEP Buenos Aires
18	Ousmane Diouf	Manager of project on NEA	IIEP Paris
19	Pablo Cevallos	Head of Office	IIEP Buenos Aires
20	Paul Coustère	IIEP Deputy Director	IIEP Paris
21	Suzanne Grant Lewis	IIEP Director	IIEP Paris
22	Sylvia Schmelkes	Research Advisory council member	IIEP Paris

A.2   Project partners and beneficiaries

	Name	Organisation	IIEP project (short name)
1	Francesc Pedro	UNESCO IESALC	ICT in Education
2	Ana Rivoire	Universidad de la Republica de Uruguay	ICT in Education
3	Fernando Bedoya	(former) Director of Computadores para Educar	ICT in Education
4	Natalia Zamora (scheduled)	Programa Nacional de Informática Educativa PRONIE MEP-FOD	ICT in Education
5	Elise Legault	(former) UIS Programme Specialist	National Education Accounts
6	Shandirai Mugari	(former) Planning Officer – Ministry of Primary and Secondary Education – Zimbabwe	National Education Accounts
7	Audrey Kemigisha	Statistician – Uganda Bureau of Statistics	National Education Accounts
8	Oumar Diedhou	Ministère de la Formation professionnelle, de l'Apprentissage et de l'Artisanat	National Education Accounts
9	Raphaelle Martinez	Global Partnership for Education	National Education Accounts
10	Nisa Felicia	PSPK Indonesia – Center for Education Policy and Research	Open Data
11	Redempto Parafina	Executive Director of the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA-EAP)	Open Data
12	Iftekar Zaman	BRAC, Research Coordinator, Advocacy for Social Change	Open Data
13	Mridusmita Bordoloi	Centre for Policy Research India	Open Data
14	Robert Randall	(former) CEO of Australian Curriculum, Assessment and Reporting Authority	Open Data

	Name	Organisation	IIEP project (short name)
15	Adula Bekele Hunde	Jimma University	Internal Quality Assurance
16	Oliver Vettori	WirschaftsUniversität Wien	Internal Quality Assurance
17	Tariq Al-Sindi	Bahrain Qualifications Authority	Internal Quality Assurance
18	Bassam Al Hamad	University of Bahrain	Internal Quality Assurance
20	Crispin Mabika	University of Kinshasa	School Grants
21	Heritiana Rasolofoniaina	Madagascar National Institute for Statistics	School Grants
22	Jean Jacques Ronald	Université d'État d'Haïti	School Grants
23	Dr. Namiyate Yabouri	Université de Lomé (UL), Togo	School Grants
24	Sena Yawo Akakpo-Numado	Institut national des sciences de l'éducation / Université de Lomé	School Grants
25	Cinthia Chiriboga	Ministry of Education Ecuador	Teacher Careers
26	Lucy Crehan	Independent consultant	Teacher Careers
27	Zakki Gunawan	Education Programme Officer UNESCO Jakarta	Teacher Careers
28	Ria Mehta / Anne Williams	NYC Government	Teacher Careers
29	Olivier Sidokpohou	IGES French Government	Teacher Careers
30	Thomas Radinger	OECD	Teacher Careers

Appendix D   Bibliography

A.3   Background documents

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- MTS 2014-2017
- IIEP BA activities report 2014, 2015, 2016, 2017, 2018
- Governing Board reports (52-57 sessions) and Appendices

A.4   Communications documents

- Communications strategy draft
- Communications plan
- My School communications plan
- Social media kit
- Web analytics
- Draft extracts from the Audience analysis

A.5   ICT for education Buenos Aires

- Country reports for Colombia, Costa Rica, Uruguay, Peru
- Interview Guide
- Matriz de Analysis para el estudio de caso
- Agenda Definitiva para reunion 2021
- Orientaciones a los paises relativas al trabajo de campo
- Estudio Revision Comparativa Politica TIC consejo asesor
- Revision Comparativa de Inicitativas Nacionales de Aprendizaje Movil en America Latina

A.6   IQA

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- Information note on IQA online courses (2017, 2018)
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- IIEP-BQA Forum Concept Note
- Webnews National Seminar Santiago (2015)
- Letter to BQA for Forum IIEP-BQA Forum

- **Xiamen international Policy Forum**
- Concept Note for Xiamen Policy Forum on IQA
- Letter of Agreement between IIEP & Xiamen University for Xiamen Policy Forum on IQA (March 2016)
- List of participants for Xiamen Policy Forum on IQA
- Programme for Xiamen Policy Forum Xiamen on IQA (9-11 June 2016)

Research methodology instruments
- Guidelines for interviews with actor groups
- Guidelines for focus group interviews with heads of departments
- Guidelines for focus group interviews with students
- Information note final methodology seminar
- IQA international survey instrument
- Programme methodology seminar
- Research proposal on IQA final
- For institutional case studies : survey instrument - academic staff
- For institutional case studies: survey instrument - administrative staff

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- Report validation workshop for IQA research
- Validation seminar programme

Publications by IIEP from the IQA project
- Book on internal quality assurance and employability (English version)
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- Book on internal quality assurance and employability (French version)
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- Policy briefs on IQA and management, IQA and employability, IQA and EQA, the effects of IQA (English version)
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- Book on IQA as a lever for change (only available in English)
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- Integrating internal quality assurance in Chile and South Africa | IIPE ...
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- Policy Forum in China focuses on quality in higher education | IIEP ...
- How does Internal Quality Assurance impact quality and ...
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- Agenda Policy Forum 2018

- Final Agenda

- Information Note

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- Open School Data

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- Country Report – Australia

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- DepEd, UNESCO-IIEP: Effective use of open school data addresses education concerns, battles corruption | Philippine Information Agency (pia.gov.ph)

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A.8 School Grants

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  - School grants in Togo: The Blue School story
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  - School grants and education quality: Lessons from the field
  - School grants in the Democratic Republic of Congo: field notebook
- GPE website:
  - Findings from research on school grants in four countries
  - How do school grants impact equity?

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- National report - DRC (FR)
- National report - Haiti (FR)
- National report - Madagascar (FR)
- National report - Togo (FR)
- Example of school monograph - Madagascar (FR)

Documentary and videos

- Aina's school (20-minute documentary)
- Series of 8 short videos on how to design and implement a school grant policy
- 3 video interviews with researchers

Infographics

- Link to 16 infographics (4 by country)

National dissemination

- Agenda and list of participants of 4 national dissemination workshops (FR)
- Short videos and press articles (FR)

Project documents

- Concept note (FR)
- GPE-GRA project proposal (ENG)
- 8 monitoring reports to GPE

Publications

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- Améliorer le financement de l'éducation: utilisation et utilité des subventions aux écoles; Haïti, Madagascar, République démocratique du Congo et Togo
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- Research brief: school grants in DRC
- Research brief: school grants in Haiti
- Research brief: school grants in Togo
- Research brief: school grants in Madagascar

Research tools

- Analytical framework (FR)
- Interview guides (FR)

- School profile (FR)

Workshop and seminar

- Information note (FR)
- Agenda (FR)
- Power Point presentations (FR)
- Policy seminar:
    - Information note (FR)
    - Agenda (FR)
    - Evaluation (FR)
    - Press release (FR)

A.9   Teacher Careers

Books

- Exploring the impact of career models on teacher motivation
- Carreras profesionales docentes: los casos de Chile, Colombia, Ecuador, Mexico y Peru
- Teacher career reforms: learning from experience (ENG, FR, SP)

Country notes

- Teacher career reforms in Colombia
- Teacher career reforms in Ethiopia
- Teacher career reforms in Lithuania
- Teacher career reforms in Mexico
- Teacher career reforms in Peru
- Teacher career reforms in Scotland
- Teacher career reforms in South Africa
- Teacher career reforms in Thailand

Case studies

- Reforma de la carrera docente en Ecuador
- Teacher career pathways in New York City
- Teacher career pathways in South Africa

Research briefs

- Why reform Teacher careers and what models are emerging?
- How do teachers perceive career structure reforms and how does this affect the profession?
- Designing teacher career structures and evaluating staff performance

- Implementing teacher career structure reform

Blog, articles and videos

- Could new career opportunities lead to greater teacher motivation?
- Teacher career reforms: learning from country experience
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- Teacher career reforms: learning from country experience', CIES 2017 panel (5 presentations)
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A.10   National Education Accounts

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  - Rapports Pays
  - Guide Méthodologique CNE

- Infos Générales
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- Présentations Pays
- 51_2016_GPE-GRA_Finance_NEA_Final_Activities_Report

Appendix E   Activity case studies

A.11   Teacher Careers

Project title	Teacher Careers
Name of research project	Exploring the organisation and management of teachers' careers
Project leader	Paris (Barbara Tournier)
Partner institutions	Representatives from Ministries of Education (Ecuador, France, Indonesia…), New York Department of Education, OECD, Independent experts.
Project objectives	The project aimed to identify different options that exist in terms of the organisation and management of Teacher careers and to analyse the implementation challenges as well as perceived effects of different career models on teachers' motivation, attraction and retention. The research looked at innovative career structures that have been implemented around the world with the aim to provide policy-makers with a range of policy options and to generate knowledge about the management of Teacher careers in a diverse range of countries. The more detailed objectives were to: 1) Make available information on the organisation and management of Teacher careers by mapping out strategies used in countries that have atypical teacher career schemes in place or innovative aspects of specific interest; 2) Assess implementation challenges and perceived effects on teacher motivation, retention and attraction; 3) Use this information as a basis to provide policy options for policy makers and governments on the organisation and management of Teacher careers
Name of project activity	This deep dive studied several interlinked activities: the **preliminary literature review,** that developed the typology used in the rest of the project: Exploring the impact of career models on teacher motivation; the **final synthesis** 'Reforming Teacher careers: learning from experience', and the **four research briefs**. Together, these represent the key outputs of the project.
Description of the activity being analysed, expected objectives & target populations	This literature review explores the contribution of teacher career models to this motivational crisis and asks whether a change in their administration could improve the quality of teaching in schools by motivating teachers to improve and increasing the appeal of the profession. The four research briefs and the final synthesis analysed the main drivers behind teacher career reforms and presented emerging models of career organisations. They also analysed teachers' perceptions of career reform and the effects on the profession and drew some practical lessons for the design and implementation of teacher career reforms. The target population for this research are primarily national and international policy makers.
Targeted countries and / or region (s)	No target group of countries was identified in the research proposal. The research aimed to reflect the diversity of existing international teacher career schemes from different geographical zones and income levels. Special attention would be given to countries that demonstrated innovative systems and policies in place. Ultimately, the research focused on several countries in Europe (Scotland, Lithuania), Latin America (Colombia, Ecuador, Peru, Mexico), the United States (New York City), Africa (Ethiopia, South Africa) and Asia (Thailand).
Start and end date	2014-2018
Total project budget (Euro) and activity budget	Project budget: Unavailable IIEP's regular budget: $189 269,00 Extra budgetary resources: Unavailable Activity budget: Unavailable. IIEP's regular budget: Unavailable Extra budgetary resources: Unavailable

Project title	Teacher Careers
IIEP's research priority	Governance and accountability for transparency and participatory planning
Resources mobilised to conduct the activity (Human and Financial)	The Teacher careers project mobilised overall one project manager, one associate (PA and SC[29]) as well as consultants and assistants[30]. One staff member of the BA office also participated on a part-time basis. The research briefs were written by UNESCO staff (Chloé Chimier and Barbara Tournier) and at times assisted by a consultant (David Childress).
Rationale for activity implementation	While serious questions related to Teacher careers are now starting to be explored, at present, there is little available research on the topic. Further, it is difficult to find detailed documentation about existing teacher career policies at the country-level. Overall, the research set out to support the notion that teachers are motivated by career prospects and professional development, and that paying greater attention to these areas may help to improve teacher retention, boost teacher satisfaction, and support quality teaching and learning. The research sought to have an international outreach, focusing on countries that can demonstrate innovative systems and policies in place.
Description of activity implementation	- Literature review (in-depth examination of career models used in different settings) - Mapping of different innovative career models that exist around the world and identification of challenges and perceived effects - Country case studies to go further into the analysis of actors and aspects that could not be covered.
Activity outputs	- Best practices were shared through the literature review with partners and particularly the OECD and the French IGES who were interested in learning about career ladders in Singapore and co-building approaches to reform with teacher unions in NYC - Presentation of study results at country study dissemination seminars with policy representatives (Ecuador, Indonesia and France) - Presentation of study results at international conferences (Oxford, CIES in Atlanta and Mexico, Teacher Task Force policy dialogues in Siam Reap and Dubai) - References in peer international studies (OECD, Working and learning together), peer to peer collaboration - A dissemination webinar for Latin American countries - Online training through the IIEP BA course on teacher policies and face-to-face training in IIEP's specialized course on teacher management
Evidence of activity outcomes	**The study has helped national policy makers demonstrate evidence of successful policy reforms in other countries**. The IIEP was invited to speak at a French ministerial event to present the study findings (Grenelle de l'Éducation 2020 online). The international best practices helped the Government show evidence of successful teacher career reforms, particularly to French teacher unions. "It was a kind of soft-power tool," explained one of the representatives of the French Ministry of Education. **Ministries of Education from countries outside of the scope of the study have demonstrated interest for similar work to be performed in their country**. Indeed, one country author was invited to lead more work for Myanmar's Government to inform its policy design. The IIEP was also invited by the Indonesian Government to share the

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[29] We need to confirm with the IIEP-UNESCO if this is refering to the parent sector of the job or not.

[30] Human Ressource (HR)

Project title	Teacher Careers

results of its study during a webinar. The webinar was attended by the Directorate General for Teachers as well as 10 Directors.

- **The study contributes to developing international policy research on the subject.** Indeed, the OECD peer reviewed the work and also used evidence for their own research. The GPE considered that the research validated their work and gave merit for future grants. It gave their programme legitimacy on an international scale and emphasised the need to associate teacher unions in reforms.

General assessment of the project	The IIEP has contributed to informing policy makers about best practices related to teacher reforms within the French government. **Sharing international good practices was seen as a "soft power tool" to renew dialogue with unions which are a historically difficult stakeholder to engage with.** The NYC experience was inspiring and useful. There are no specific outcomes yet linked to this presentation. In France, the teaching profession unites over 1M people. Such a reform will only happen within the context of a presidential election. It was nevertheless a useful exercise. In Ecuador, a big teacher career's reform was implemented in 2006 but no real impact evaluation was performed to evaluate its effect. Looking back, some things could have been done better, particularly in relation to general policy coherence in educational planning. **The policy seminar funded by the project provided an opportunity to show the limits of the reform and to present real evaluative tools that can be used to measure a policy's impact**. Impact evaluation methodologies in this sector are missing at the country level. Following the seminar, an initial impulse was observed to go about making changes (preparatory courses for teachers, continuous training), but it was quickly cast aside. IIEP's research was very well received in several south east Asian countries that were not formally part of the project scope. **The dissemination of the research results across South East Ministry of Education centres was very effective**. In Indonesia, the research has been used to inform current debates about a national reform. The reform is still in its early changes, but the DG has asked for a follow up discussion with the IIEP team.
Enabling factors and/or obstacles to research uptake and policy learning	**Enabling factors** for the uptake of the policy learning include (and are not always specific to this particular research topic): - Free access to the research - Effective communication tools (short synthesis and research briefs) - Presentation of research findings by the research team itself (more personal and spurs a debate, a real interaction follows) - Practical and hands-on research which makes the policy research easier to apply and more approachable too. The language is not too academic and approachable. It goes into the details of policy schemes which is very useful for thinking about implementation **Barriers** limiting the effective uptake of the policy include:

Project title	Teacher Careers
	• Language barriers remain an issue when abstracts are not available in the national language
	• Political contexts are varied and can be an important barrier to change implementation. One country representative reported that the analysis was quickly forgotten due to a lack of available education experts within the ministry
	• Corruption poses a problem in the adaptation of certain policy findings. For instance, introducing a variability in paying teachers is open to misuse. As such, introducing policy changes may enhance the risk of corruption if not managed properly.
Lessons learned and recommendations	**Intersectoral dialogue to implement teacher career reforms is essential and should be further promoted within studies**. Experts within national ministries with a real interest in making changes based on evidence is a prerequisite to introduce any change. Inviting civil society to partake in the policy reform debate is essential too. **To further increase research visibility and impact, using video more as a medium is useful.** Videos can be shown in a training day or in a Ministry. Speaking at a conference is good but less accessible for reaching a wider audience. Online training courses conducted by IIEP Buenos Aires are also good for getting people in person to interact. **It is recommended to widen the stakeholder group that are associated to the research process to lead to truly effective research**. This includes unions, professional bodies, teacher educators who are often forgotten, current teachers and school leaders. NGOs should also be included as they intervene in schools.
Sources of information and interviews conducted	• IIEP-UNESCO, joint interview with Chloé Chimier (France) • Independent expert in Ecuador and retired official of the Ministry of Education, Cinthia Chiriboga (Ecuador) • Independent expert, Lucy Crehan (UK) • Mehta Riddhi, Williams Anne, NYC Governement (USA) • IGES French Government, Olivier Sidokpohou (France) • Indonesian Government, Gunawan Zaki (Indonesia) • OECD, Thomas Radinger (France)

A.12   School Grants

Project title	School Grants
Name of research project	Improving school financing: the use and usefulness of school grants
Project leader	Paris (Candy Lugaz and Chloé Chimier) **Name of partner institutions**: GPE, Ministries (Ministère de l'Éducation nationale et de la formation professionnelle d'Haïti, Ministère de l'Éducation nationale et des Finances du Madagascar, Ministère de l'Enseignement primaire, secondaire et Initiative à la nouvelle citoyenneté du Congo, Ministère des Enseignements primaire, secondaire et de la Formation profesionnelle du Togo, Ministry of Honduras), public institutions (Institut national de la statistique de Madagascar) education planners, research community (Université d'État d'Haïti, Université de Kinshasa, Institut national des sciences de l'éducation, Université de Lomé), independent consultants.
Project objectives	Building on the experience and lessons learnt from previous research projects, the research project was aimed to fill the knowledge gap on the contribution of school grants to increased access, better equity and improved quality at school level. It pays specific attention to the following issues: criteria and mechanisms of grant distribution; the use of school grants at the school level; monitoring and control on the use of grants, impact of the grants.

Project title	School Grants
Name of project activity	• **Comparative analyses** on school grants in Franchophone countries and Latin America – including benchmarks • **Blogposts and Documentary**
Description of the project activity being analysed, expected objectives & target populations	• The **comparative analysis in Latin America** was a collection of research papers on the subject of school grant policies: their implementation, their results and impact achieved in various different countries. • The comparative analysis in francophone African countries was a detailed comparative analysis structured around thematic chapters and using research findings from the four countries studied: • A collection of **blog posts** communicated about school grant policies in the various different countries involved through the IIEP website, the Learning Portal and the GPE blog. • The **documentary** focused on a presentation of the work IIEP has been doing related to school grant policies in schools. A series of 8 videos on how to design and implement a school grant policy and 3 video interviews with researchers were also developed. The objectives of these activities were aligned with those of the general project. The target audience of these activities are primarily the Ministries of Education as well as the research community.
Targeted countries and / or region (s)	Francophone Africa and Latin America were the primary target regions following previous research conducted by the IIEP on school grants in Eastern and Southern African countries, Asia and the Pacific. Countries include Togo, Madagascar, Democratic Republic of Congo, Haiti, Honduras as well as other LATAM countries in the comparative analysis. The target countries and regions of the research papers were similar to those identified at the project level. The blogposts and documentary sought to reach a broader audience.
Start and end date	2013-2016
Total project budget (Euro) and activity budget	**Project budget**: 996 812,00$[31] IIEP's regular budget: 14 210$[32] Extra budgetary resources: 982 602$[33] **Activity budget:** Information unavailable IIEP's regular budget: Information unavailable Extra budgetary resources: Information unavailable
IIEP's research priority	**Improved cognitive and non-cognitive learning outcomes**
Resources mobilised to conduct the activity (Human and Financial)	Overall, the School grants projects mobilised one project manager, an associate (PA), assistants and consultants. Overall, the IIEP staff involved included Candy Lugaz, Chloé Chimier (Associate) and Christine Emeran (Consultant) as well as external consultants (Jean-Jacques Ronald (Haïti), Crispin Mabika (DRC), etc).
Rationale for activity implementation	At the time of the study, almost all African and Latin America countries had ongoing reforms related to their school financing

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[31] This is the proposed budget in the IIEP's concept note for GPE.

[32] Budgetary information regarding projects communicated by the IIEP to Technopolis Group (February 2021).

[33] This is an assumption made by Technopolis from the total budget communicated as well as the IIEP's budget for the project.

Project title	School Grants
	systems, which is a strong component of financial decentralisation. This research project was an opportunity for countries to review their reform results and to compare themselves with neighbouring countries. The research papers were published with the goal of sharing the research results with policy makers using a more synthetic format and focusing on specific topics related to school grants. The blog and documentary were developed with the goal of reaching a wider audience through a more accessible format.
Description of activity implementation	• Desk review of school grant policies to identify the countries (DRC, Togo, Haiti, Madagascar) • Selection of research team consultants. The IIEP chose a lead researcher and a representative from the Ministry of Education and Finance. • A workshop was organised with the four team to pilot the research together. The IIEP quality controlled the input from the ground in the research phase. The national reports were not intended to be published. • Blog posts were developed by the IIEP based on the literature review and research findings. In cooperation with the local teams, mini videos and a documentary were also developed to showcase the research results.

Activity outputs	• Documentary and video series (no data available on number of viewings)
	• Research papers (no information is available on the quantitative dissemination of the papers in each country)
	• Other project outputs
	  – Dissemination seminars at the national level in all countries (37 participants took part in the October 2016 seminar)
	  – Common policy study seminar in Paris (27 participants from Benin, Burkina Faso, Haiti, Madagascar, Mali, Morocco, Democratic Republic of Congo, Tchad, Togo, Tunisia, UNESCO Nigeria).

Evidence of activity outcomes	Generally speaking, the evaluation team was not able to identify any direct links between the two activities analysed and specific outcomes. This is in part due to the nature of the activities (e.g., dissemination activities); but is also linked to the lack of available secondary data on the activities themselves (e.g., readership of posts, viewership of the documentary). As such, these activities can be seen as part of what drove the project to achieve some of its broader outcomes, including the following:
	• **Comparative research has helped partner countries to position themselves and learn from their neighbours, leading to important achievements in almost all countries**.
	  – In the case of the Democratic Republic of Congo, findings from Madagascar and Togo ((e.g., tax breaks to free children to attend school) were considered particularly interesting. Many children remain out of the system in the DRC despite the free system. Studies are useful to see what works better elsewhere and why.
	  – In Madagascar, there is evidence that the report is being used by the Ministry of Education to develop a future strategy. There is not a lot of national literature on the subject of school grants. Interactions with other countries have been fruitful, especially with Togo and DRC.
	  – In Togo, the results were shared with national education inspectors, administrations and representatives from the ministry's cabinet. According to one interviewee, the results of the research have been largely taken into account in the strategies for implementing and managing grants to schools from 2017 onwards. The plan for making funds available has been improved, and capacity building of the COGEPs (management committees of public elementary school) has been planned.
	  – In Haiti, the synthesis of the comparative study was also shared with officials from the Ministry of Education, although there has been no feedback since.
	• **Countries outside of the scope of the study have also found research results useful**. The comparative analysis research results were found relevant in Chile where the Government is still trying to revert decentralisation policies. A cross country exchange

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occurred between Chile and Brazil on this topic. In Angola, the research findings were also found to be very useful.

- **The research findings were used by a broader set of stakeholders, outside of decision makers and academics**. Slowly things have evolved in the way that the IIEP considers its main audience. The IIEP is opening up to a wider audience, and this project is a good illustration of this effort. Country experts also report that donor organisations can also use the research findings through the videos. In the case of Madagascar, technical and financial partners (mainly donors) showed interest in policy recommendations formulated by such a report. In Togo, IIEP's research is of interest to all categories of actors in education: ministry officials, inspectors, school principals, teachers, parents and partners. Many have requested copies of the printed national synthesis. Copies are available at the library of the National Institute of Educational Sciences and the University of Lomé and are consulted by students and teachers. All preschool and primary school inspectorates that took part in the research, the management and parents' associations of the schools surveyed also received copies of the summary report on Togo.

- **Partners have invited IIEP to cooperate on further research studies**. The IIEP was invited to conduct studies informing Global Education Coalition on their report. IIEP prepared a paper on decentralisation, contributing to a wider discussion on decentralisation governance.

Overall assessment of the project	**The IIEP research is often used as a source for policy makers and is not in itself a trigger for policy change**. Providing evidence-based research is well welcomed in some countries (Togo), but not all (Haiti for example) The comparative element of the study is engaging and triggers the attention of policy makers more easily as they are keen to compare themselves with neighbours. **The IIEP research on school grants was considered complimentary to existing debates on reforms relating to school grants which is a topic largely monopolised by big funders**. Indeed, the research position of IIEP offers a different perspective, a different voice. School grants is a policy often promoted by big funders such as the World Bank. The research showed some important limitations to the policy in relation to equity and implementation. Officials within Ministries could feel more comfortable going their own way thanks to additional comparative research provided by the IIEP. In Haiti, it was found that the study showed the shortcomings of the subsidy system in Haiti. The report emphasised the importance of quality in education and not just access to education. Increasingly, national policy makers are putting a stronger emphasis on the quality of education. **There is little further evidence of how findings from the school grant research have been concretely used in countries outside of the scope of the study, such as Chile or Angola. There is also a lack of evidence supporting an uptake of research results by stakeholders outside of those involved in the research work.**
Enabling factors and/or obstacles to research uptake and policy learning	**Making the information available in national languages**, not just English, **is hugely important for accessibility**, particularly in the case of comparative case studies. **Institutional support from authorities** is also key to an effective dissemination of policy learning. In Togo, an interviewee reported that there were "no barriers to participation, dissemination or use of IIEP research. Ministerial authorities supported the team and issued all authorsations for the smooth conduct of the research. They also accompanied the dissemination of results." On the contrary, an unstable political environment will limit the extent to which remarks and recommendations are taken into account. Many countries are affected by regular

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	reshuffling. Ministries change, so do their style and equipment. It is therefore difficult to give continuity to policy change processes. **The IIEP's approach**, which combines methodological workshops and workshops for cross-fertilsation of results from different countries, **was considered particularly enriching and relevant** for one interviewee. It is considered a better approach than that of the AUF's Project LEARNING on the pedagogical practices of public primary school teachers in which Togo is also involved. The fact that the country reports are developed under the auspices of the IIEP gives national researchers more credibility when they are involved in the research work. Politicians are likely to take the recommendations more seriously. **Nevertheless, some countries do not value knowledge or knowledge-informed decisions**. "If the researcher is used, it is because the policy seeks validation of expenditure or actions. Leaders do not give importance to knowledge. They are obliged to commission studies because donors demand it. These studies are not used for political decisions. They do it because it is a prerequisite[34]."
Lessons learned and recommendations	It is important and necessary when producing research on grant policy to **reach grassroot level organisations**. Some head teachers attended national dissemination seminars. Such participation should be further encouraged to broaden the impact of the research to a wider group of stakeholders. In Togo, school inspectors had not really been informed about the launch of free schooling and the criteria for the subsidy. The study made them aware of this and encouraged them to get involved. **Dissemination activities should be reinforced within local teams**. Local teams are best placed to reach local stakeholders, but the IIEP strongly depends on their willingness to communicate effectively. This can create a weakness because the communication aspect at the central level is sometimes lost. In the case of Honduras, the dissemination activity was too burdensome for the university. The IIEP team took over on this occurrence. **IIEP findings should be communicated more efficiently to donors**. The World Bank has been working on the topic of school grants for over 20 years. The report could be distributed by UNESCO, as the Chair of the Education Strategy Group where all the donors are involved. They could take care of the distribution of such findings

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[34] Interview with country report author, February 2021.

Project title	School Grants
	to inform the different actors on the issue of subsidies in schools to guide them. **School grants is an essential part of educational planning, but this goes hand in hand with teacher training**. "If we want to change education in a country, we have to look at teacher training, the content of textbooks, their effectiveness in the classroom, the pedagogical relationship between teachers and pupils, supervision, and how to help teachers to teach better. If content was standardised in Togo, or Chad... We would have made good progress[35]."
Sources of information and interviews conducted	**Interviews**: • Joint scoping interview with Chloé Chimier • Joint interview with the IIEP project activity team: Chloé Chimier, Candy Lugaz, Marcelo Souto Simao (France) • Université d'État d'Haïti, Professeur Ronald Jean Jacques (Haiti) • National Institute for Sciences of Education, Sena Yawo Akakpo-Numado (Madagascar) • University of Kinshasa, M. Crispin MABIKA MABIKA (DRC) • l'Institut National des sciences de l'éducation (INSE), Dr. Namiyate YABOURI (alias Sambiani Jean-Claude) (Togo) • National Institute for Statistics, M. Heritiana RASOLOFONIAINA (Madagascar) • GPE, Krystyna SONNENBERG and Mme Wenna Ross PRICE (USA)

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[35] Interview with country report author, February 2021.

A.13   Internal Quality Assurance (IQA)

Project title	Internal Quality Assurance (IQA)
Name of research project	Innovative and effective solutions for internal quality assurance of higher education: What are their effects on academic quality, employability and managerial effectiveness?
Project leader	Paris (Michaela Martin) **Name of partner institutions**: Jimma University (Ethiopia), WirschaftsUniversität Wien (Austria), Bahrain University, Bahrain Qualifications Authority.
Project objectives	The overall goal of the proposed research is to generate knowledge in order to provide evidence-based policy advice to national and institutional higher education leaders, mainly in developing countries on existing innovative and cost-effective solutions for IQA systems in universities. The more detailed objectives are to: illustrate approaches and options that can be considered as good principles and can guide higher education institutions in the design and development of their own IQA systems; demonstrate the effects of IQA systems on the quality and relevance of academic programmes (employability of graduates) and on planning, management and decision-making; and identify internal and external factors in universities that condition the effective functioning of IQA systems.
Name of project activity	• **Online courses** (Arab countries and NORHED programme partner institutions) • **National QA forum** (Bahrain[36])
Description of the activity being analysed, expected objectives & target populations	The **online courses** aimed to review innovative options and good practices for the development of an integrated internal quality assurance (IQA) system in a higher education institution, which supports quality, employability, and a culture of quality. They included a maximum of 15 university teams, consisting of 3–5 members each. The **National QA forum** in Bahrain jointly organised with the University of Bahrain aimed to share knowledge on IQA best practices from HEIs internationally and nationally, discuss innovative policies, processes and tools and reflect on good principles in IQA which contribute to the development of internal dialogue on quality and the creation of a quality culture. The forum was designed for QA officials from HEIs operating from the Kingdom of Bahrain. The **target populations** of the courses and policy forum were mainly university leaders, academics, experts involved in Quality Assurance (QA) units at institutions or representing a regional QA authority.
Targeted countries and / or region (s)	The online courses targeted both the Middle East and Africa. The policy forum took place in Bahrain, in the Middle East.

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[36] Originally, the intention was also to study the international policy forum that took place in China. For lack of available stakeholders, we were unable to focus the deep dive on China.

Project title	Internal Quality Assurance (IQA)
Start and end date	The online course funded by Norad took place in 2019. The online course with UNESCO's Beirut office took place in 2018. The QA Forum in Bahrain in cooperation with the Bahrain Education and Training Quality Authority occurred in 2018.
Total project budget (Euro) and activity budget	Project budget: Unknown IIEP's regular budget: $187 982,00[37] Extra budgetary resources: Unknown **Activity budget: Unknown** IIEP's regular budget: Unknown Extra budgetary resources: Unknown
IIEP's research priority	**Governance and accountability for transparency and participatory planning**
Resources mobilised to conduct the activity (Human and Financial)	The IQA project overall mobilised one project manager, associates, a part time programme assistants and external consultants who notably performed the university case studies.
Rationale for activity implementation	In order to respond to the preoccupation of UNESCO Member States with the enhancement of the quality of higher education, the IIEP has invested efforts in the area of external quality assurance in higher education. The **four training modules on IQA were developed alongside the case study research exploring organisational and methodological options of IQA systems**. These modules were used three times for regional e-learning course, one face to face course in Mongolia. The IQA course has been translated into French and adapted beginning of 2021 to be offered as an e-learning course to Tunisian universities in 2021. A second course will be organised in 2021 for the universities of the NORHED_2 programme. The **policy fora** were part of a wider international dissemination campaign on the project research results, held in partner countries.
Description of activity implementation	• The module with UNESCO Beirut was run, in 2018. The NORHED edition of the online course was run once in 2019 and will be repeated in 2021. • Participants were selected by the IIEP and its partners on the basis of their quality as university officials in charge of quality management (vice-rectors for academic affairs and quality managers at the central and decentralised levels). The participation of women professionals was strongly encouraged. • The policy forum in Bahrain was designed for QA officials from HEIs operating in the Kingdom of Bahrain. It was organised in coordination with the Education and Training Quality Authority of Bahrain. The total number of participants was 110 participants.
Activity outputs	• Delivery of 4 online courses on IQA overall. As concerns the IQA course run in cooperation with Norad, there were 36 participants from 6 countries for the 2019 edition (Ethiopia, Malawi, South Sudan, Sudan, Uganda, Zambia) (75% course completion rate). Concerning the course run in cooperation with UNESCO Beirut, 46 participants from 8 countries took part in the 2018 edition (Bahrain, Iraq, Jordan,

[37] Data communicated by IIEP to Technopolis Group in February 2021.

Project title	Internal Quality Assurance (IQA)
	Lebanon, Oman, Somalia, Syria and United Arab Emirates) (85% course completion rate). • Organisation of a policy forum on IQA in Bahrain (gathering renowned experts and researchers, QA professionals and researchers who contributed to the IIEP case study).
Evidence of activity outcomes	• **Online courses:** – **Capacity building for higher education managers and officials**: staff in Ethiopia and Bahrain were successfully trained during the modules, and they themselves have trained other institutions within their network. The public University of Bahrain for instance was contacted by private universities locally to do further training. In Ethiopia, the online course gave the University of Jimma staff a new exposure to IQA which changed their assessment of the way graduate employability for example can be assessed. The University is now using concepts from the literature produced by IIEP. Two Directors of Quality Enhancement and assurance attended the training. Since, then, all 7 members of the direction have been using the reporting to adapt the system. The IQA strategy plan of the University of Jimma was adapted and aligned with quality assurance practice from IIEP. The training with IIEP was delivered in Jimma but the university has coordinated an assessment and developed a manual so that people involved can share their experience with other southern universities (Assosa). – **Participant's satisfaction with the online courses for Africa and the Middle East was very high.** The majority of participants from both groups (Norad and UNESCO Beirut) evaluated the content of the modules as 'Very relevant' or 'Relevant' to their professional practice. The experience of working in groups for the preparation of the group assignment submissions was assessed either as 'Very good' or 'Good.' The vast majority of participants found learning resources useful and confirmed that the knowledge gained during the course contributed to improving their professional practice. Participants were also asked whether they intend to implement any changes in their institutions based on the knowledge gained in the course. Close to all respondents answered 'Yes'. • **Policy fora:** – **Sharing best practices and learning from peers**: ◦ The Higher Education Council in Bahrain in charge of implementing IQA has reported learning from Austria and Germany and will consider changing some practices as it is in the process of making some organisational changes (disassociating the Higher Education Council from the Ministry of Education); the Policy Forum in China opened Bahrain's eyes to new models and way of doing things. ◦ The Bahrain Quality Assurance invited the IIEP to co-organise a presentation at a national forum on IQA. The Higher Education Council, in charge of implementing changes in IQA, attended the workshop and studied recommendations. According to an interviewee, it takes time for such recommendations to be truly implemented but they are being considered. The University of Bahrain took part in the IQA case studies and reported that best practices from Germany and Austria were also being studied by the Higher Education Council. For instance, the accreditation procedures in Germany are outsourced, unlike in Bahrain where they are done by HE staff. The possibility of externalising the accreditation could remove an important administrative burden from the HE, who would then be able to focus on other things, like licensing. The HE also learned a lot from Austria about working through data. "They have data-driven opinions. We have taken note of this practice in Bahrain to have a better representation of the data and data driven decisions (student surveys, faculty surveys, graduate survey…) ." The University of Bahrain received new exposure at a regional level through its participation in the Policy Forum. IT was contacted by the Gulf University to discuss doing trainings. • **Other identified project outcomes:** – **Gradual implementation of changes in procedures and IQA practice**: the University of Jimma in Ethiopia is working on changing its strategic plan on IQA, helped by best practices from IIEP research during the online trainings;
General appraisal of the project	Overall, research learnings on IQA from the IIEP have played a role both in Ethiopia and Bahrain in helping policy makers reflect on

Project title	Internal Quality Assurance (IQA)
	IQA practice. This includes: improving data collection for IQA, implementing employability studies, restructuring an IQA unit, integrating QA with strategic planning of their institution, making changes to enhance teaching and learning practices, making IQApart of an institutional culture, strengthening the IQA processes and tools[38]. All Norad course participants confirmed that the knowledge acquired has helped to improve their professional practice. Whereas there are strong intentions to implement change in institutions based on the knowledge acquired gained I the course, **no current IQA reforms are expressly underway, but interviews have confirmed that high-level staff is considering such practices.** Furthermore, both universities have contributed to disseminating knowledge acquired through the trainings with their networks, thus increasing the potential impact of the research results. Jimma University provided further training to other universities in its network. The Bahrain BQA authority also shared IIEP material on its website so that private institutions could make the most of these courses. They announced the content and believe that a number of private institutions also enrolled on the course and were interested in obtaining diplomas. According to an international European partner, the IIEP has a strong reputation for delivering qualitative international comparative studies. The research produced and online trainings provides practical, hands-on solutions on IQA to policy makers or higher education staff. IIEP is contributing to the change in reflection on IQA at an international level, moving away from an instrument approach to a more holistic organisation and culture approach. **However, the ability of the IIEP to truly impact IQA systems should not be overstated**. IQA systems are complex and involve a large number of people. In Indonesia alone, there are over 300 higher education institutions. The extent to which the impact will truly be important depends on the number of institutions that are able to take part in the trainings and then share their learnings with others.
Enabling factors and/or obstacles to research uptake and policy learning	An **unstable political climate remains an important barrier** for the uptake of policy recommendations. **Organisational structures and dynamics at the national level can also limit an effective uptake of policy results**. At times, the question of IQA is split between several agencies which sometimes depend on the Ministry of Education. In the case of Bahrain, a power conflict has been reported

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[38] Evaluation IQA in HE in African Countries from NORHED Programme. Source communicated to Technopolis by the IIEP.

Project title	Internal Quality Assurance (IQA)
	between the Higher Education Council and the Quality Authority for some years which has limited change. This may quickly change with a new decree set to separate the HE Council from the Ministry. Invitations to join courses are extended to organisations that are usually part of IIEP's circle and do not always reach those organisations which have not had contact with the IIEP previously. This is one limit to a broad coverage and reach of HEI invitations but is explained by the IIEP's lack of dissemination sources to do so, and reliance on partner HEI institutions in communicating about the course. One interviewee reports that it is hard to attract new participants outside of those that are already known to the international IIEP circle. In order to partake in the training, institutions often have to find their own funding means. This is an important barrier to participation for those organisations that are less connected to international networks and funders. The IQA authority in Bahrain for instance funded its participation through the JIKAKA initiative, a global initiative for quality assurance capacity. In contrast therefore, an enabling factor is to ensure information about the course is communicated to many, in addition to possible funding options.
Lessons learned and recommendations	**Awareness raising policy forums and trainings on IQA remain extremely useful to promote research uptake**. The Jimma University benefited hugely from the NORHED programme and its funding which permitted several staff members to take part in trainings. Interviewees overall agree that such trainings should continue to be provided. From a more practical perspective, it has been noted that the certificates of attendance were very useful for agencies in Bahrain. This should also be maintained. **Ensuring a "leverage effect" at the country level is key to achieving impact and wider research uptake**. The impact of such trainings is strongly limited to the number of participants that are able to fund their participation. **Particular attention should be paid to the organisational dynamics at the country level when selecting participants.** If a national QA Authority exists, such staff representatives should be invited as well as universities. **Cooperation among universities on this topic is limited.** As reported by a representation from an IQA authority: "universities don't easily work together, they require a network to do so. Universities observe each other as competitors." **Institutions that take part in the course should therefore commit to training other universities in the field in order to ensure wider knowledge sharing.** This facilitates the knowledge sharing in the future, although universities' ability to also disseminate information about the trainings should not be overlooked.

Project title	Internal Quality Assurance (IQA)	
Sources of information and interviews conducted	• IIEP-UNESCO, Michaela Martin (France)	
	• WirschaftsUniversität Wien, Oliver Vettori (Austria)	
	• Bahrain Qualifications Authority, Jawaher Shaheen Al Mudhahki (Bahrain)	
	• Jimma University, Adula Bekele Hunde (Ethiopia)	
	• Bahrain University Bassam AlHamad (Bahrain)	

A.14   Open school data

Project title	Open school data
Name of research project	Using open school data to improve transparency and accountability
Project leader	Paris (Muriel Poisson)
	Name of partner institutions: Transparency International Bangladesh (TIB), Stanley Rabinowitz, Amherst College (Australia), National University of run C. Mehta, Educational Planning and Administration (India), Ministry of Human Resource Development (MHRD) (India), National Council for Educational Research and Training (NCERT) (India), ASER Centre (India), National Campaign for People's Right to Information (India), Centre for Policy Research (CPR) (India), Local communities of Pattiro Semarang, Skholatanpabatas Makassar, and IdFos Bojonegoro (Indonesia), Transparency International Indonesia, Faculty of Education at Sampoerna University (Indonesia).
Project objectives	The main objective of the project is to improve decision-making and the management of educational systems by integrating governance and corruption concerns into methodologies of planning and administration of education. It is also to develop methodological approaches for studying and addressing the issue of corruption in education and to collect and share information on the best approaches for promoting transparency, accountability, and integrity in the management of educational systems in both developing and industrialised countries.
Name of project activity	• Study tour on My School Initiative (Australia) • Six case studies on Asia and the Pacific on Opening School Data to improve transparency and accountability
Description of the activity being analysed, expected objectives & target populations	• **My School study visit[39]** : Decision-makers and high-level education officials from seven countries in the region gathered in Sydney, Australia for the start of the My School study visit. This event, organised by the Australian Curriculum, Assessment and Reporting Agency (ACARA) and the UNESCO International Institute for Educational Planning (IIEP) focused on how to improve transparency and accountability in schools in the Asia-Pacific region through the use of data. • **Case studies:** 6 case studies were published in the framework of the Ethics and Corruption in Education Series. IEP conducted research to explore the recent development of school report cards and to examine cases in which report cards prove especially successful in helping to improve transparency and accountability in education systems. This research included the preparation of case studies on the use of open school data in six countries from Asia and the Pacific – namely **Australia, Bangladesh, India, Indonesia, Pakistan (Punjab), and the Philippines – as well as two state-of-the-art papers on Africa and Latin America**. The main target population was policy decision makers within Ministries of Education.
Targeted countries and / or region (s)	At the project level, the main focus was Asia and the Oceania Region. The six case studies focused on Asia. The study tour was organised in Australia.
Start and end date	The Study Tour took place in 2016. The case studies were developed in 2018.
Total project budget (Euro) and activity budget	**Project budget**: Information unavailable

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[39] At the time of the submission of the draft final report, we had not managed to conduct an interview on the subject of the School Initiative tour.

Project title	Open school data
	IIEP's regular budget: $268 061,00[40]
	Extra budgetary resources: Information unavailable
	Activity budget: The case studies amounted to 15.000 USD each[41].
	IIEP's regular budget: Information unavailable
	Extra budgetary resources: Information unavailable
IIEP's research priority	Governance and accountability for transparency and participatory planning
Resources mobilised to conduct the activity (Human and Financial)	The open data activities mobilised one project manager, one associate, an assistant as well as several external consultants (Stanley Rabinowitzl (Australia), Dipu Roy and Abu Said Md. Juel Miah (Bangladesh), Mridusmita Bordoloi and Varun Kapoor (India), Nisa Felicia (Indonesia), Kashmali Khan (Pakistan), Redempto S. Parafina (Philippines) that took part in the case study drafting. Muriel Poisson was the main contact point for coordinating the human effort of the case study and study trip activities.
Rationale for activity implementation	IIEP has been working on the issue of ethics and corruption in education for over 20 years. One of the conclusions of the past research work that they carried out is that access to information is key if you want to improve transparency and accountability. Increasingly, Ministries of Education in India, Indonesia and Bangladesh, started to share information with citizens and work on open data more generally. **There was a need to document what was already being done, understand the conditions for success and meaning for people, and that at the end of the day the information used will benefit the system**. This is what embarked the IIEP on this topic, thinking that there would be a need to document what was already being done and understand the conditions for success. The choice to focus on Asia was because these countries were the most advanced in the developing world regarding open data in education (in comparison to Africa or Latin America). The study tour was organised in Australia because Australia has a lot of experience on sharing school data initiatives.
Description of activity implementation	• Local case study authors were selected by the IIEP team. They were selected on the basis of their expertise on the topic and connexion to the local ecosystem. • The study tour was co-organised with the agency in charge of managing the My School Initiative in Australia. The IIEP built a working relationship with them. The logistical organisation of the visit was done by the Australian party.

[40] This was the budget for the project disclosed by the IIEP from SAP, communicated to Technopolis in February 2021.

[41] Information communicated by the IIEP during an interview in February 2021.

Project title	Open school data
Activity outputs	6 case studies - National dissemination events (India, Indonesia, Philippines) - Study tour (Delegations from seven countries – Bangladesh, India, Indonesia, Nepal, New Zealand, Pakistan and the Philippines attended, as well as numerous Australian organisations such as ACARA itself, the Federal Department of Education, the New South Wales Department of Education, Parent Associations and the federal Department of Foreign Affairs and Trade.) - Two regional state of the art papers - Policy forum
Evidence of activity outcomes	**My School Study Visit** – Capacity building and peer learning: the school study tour was an eye opener for some officials with less experience with data. Data driven policy is still limited. Officials learned about new ways to deal with data with the report card system. Such a method was previously unknown (India, Indonesia). **Case studies** – Promotion of dialogue between the Government and civil society (Philippines, India, Pakistan) – Strong dissemination and press coverage of research results (particularly in the Philippines).
General appraisal of the project	An important outcome of the case studies has been the **promotion of dialogue between the government and civil society**. There is no common pattern reflecting how this was achieved. Countries have generated different results. In India, lessons learned from Australia were deemed particularly useful for the Ministry. In the case of Pakistan, the research was also used to push for the use of school data in some regions, particularly Punjab. **The strongest evidence of an uptake of results comes from the Philippines.** In the Philippines, the research has clearly helped to improve the existing programmes. The units and offices took interest: the School Effectiveness division invited the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA) to be present in their capacity building events and trainings. For a long time, there was no commitment on education. In 2018, ANSA was able to convince them to go into the Open Government Partnership processes and to commit. The Ministry of Education has since then developed a course on transparency and included a number of references to open data in the training material. It should be noted however that **in some cases**, like Bangladesh, **the policy discussion following the case studies was relatively short-lived**. The study strengthened the local education authorities and temporarily acted as point of reference for the discussion. The Directorate of Primary Education received the report and a policy brief. A press conference was held to launch the report and conferences are largely covered by the Media. However, involved parties are said to lack the authority to implement any further changes. In Indonesia, the study struggled to attract a lot of attention from the Ministry of Education. Few representatives from the Ministry were present at the dissemination seminar. It was received more positively from NGOs and local partners like Transparency International. **Less information is available regarding the effect of the Study Tour on Participants**. The main effect was to push the agenda in these countries, and for them to learn from each other. The extent to which these learnings have led to changes within the organisation is unknown.
Enabling factors and/or obstacles to research uptake and policy learning	**A committed Ministry of Education is a major enabling factor for the uptake of research and policy work**. In the Philippines, where the Ministry of Education is strongly committed to the topic of

Project title	Open school data

transparency and working with civil society, the research has been extensively studied and will be used. In Indonesia however, where open data is a relatively new topic, the discussion was culturally challenging. "When collecting the data, it wasn't easy to build trust, reporting to the authority. In our culture it is not easy to speak deliberately. Culture plays a role." In Bangladesh, obtaining data from the Government was difficult too they are reluctant to share information.

A shortage of funds to pursue research and study recommendations further to consider their adaptability **is an important limit for the successful uptake of policy recommendations**. In Bangladesh, more work is required still to implement changes, but funding is missing. The broad circulation of the report is also a necessary prerequisite to ensure a successful uptake of research learnings.

Lessons learned and recommendations	On some occasions, engagement with the report was short-lived. Those concerned countries suggest that **follow-up activities on the report are necessary** to keep the momentum going. Follow-up from the IIEP is necessary but locally it is also important to use the research results as an advocacy tool (e.g: organise consultation meetings of training programmes). As an intergovernmental body, the IIEP has access to governmental contacts. Developing training programmes with open-data initiative personnel is a good idea.

To ensure an effective uptake of research results, it is strongly recommended to democratise the dissemination of results to a wider group. In the case of Indonesia, it was considered particularly important to open up this research to students, to build their civic engagement and give them a voice. It is important to treat students not only as beneficiaries but also as participants of education planning. The research results could be simplified and turned into short informational sheets which could reach a greater percentage of people. On the academic side, it has been suggested to also further engage with universities in the social sciences to see how the findings could be incorporated in syllabus or education planning.

Sources of information and interviews conducted	**Interviews**

- Muriel Poisson, Coordinator IIEP.
- Redempto Parafina, ANSA Phillipines
- Nisa Felicia, PSPK Indonesia
- Iftekar Zaman, BRAC Bangladesh

Documents

- Six country reports: Australia, Bangladesh, India, Indonesia, Pakistan, Philippines.

Project title	Open school data
	2018 Policy Forum: Using Open School Data to Improve Transparency and Accountability in Education | IIEP-UNESCO - Two regional states of the art reports: Latin America and Africa - Review of 14 school report card initiatives - Improving transparency and accountability through public access to school data" | ETICO - IIEP UNESCO | Platform on ethics and corruption in education "You measure what you treasure": key lessons from Australia's My School | ETICO - IIEP UNESCO | Platform on ethics and corruption in education - International Policy Forum puts the spotlight on using open school data to combat corruption | IIEP-UNESCO - Press articles - DepEd, UNESCO-IIEP: Effective use of open school data addresses education concerns, battles corruption | Philippine Information Agency (pia.gov.ph) - https://edukasi.kompas.com/read/2018/11/14/17125671/mendorong-keterbukaan-data-untuk-peningkatan-kualitas-pendidikan

A.15   ICT in Education

Project title	**Aprendizaje Movil**
Name of research project	**Iniciativas Nacionales de Aprendizaje Móvil en América Latina (Buenos Aires)**
Project leader	IIPE Buenos Aires Partner institutions: Division for Policies and Lifelong Learning Systems in UNESCO's Education Sector.
Project objectives	The goal of the study was to delve into the analysis of public policies focused on the integration of ICT into the education system as a strategy for educational needs in the region. The study is thus presented as a tool for policy makers and actors involved in educational planning by providing elements of analysis and recommendations to develop mobile learning policies and programs.
Name of project activity	Country case study reports
Description of the activity being analysed, expected objectives & target populations	IIEP therefore conducted an analysis of public policies focused on the integration of ICT in education in four Latin American countries. For each country listed below, a specific policy was analyzed with the goal of then publishing a comparative study on a cluster of mobile learning initiatives. The four policies analyzed were: Computadores para Educar (Colombia) Programa Nacional de Infomatica Educativa (Costa Rica) Acciones e initiativas TIC (Peru) Plan Ceibal (Uruguay) Specific objectives include : Strengthen the knowledge base on effective mobile learning initiatives and 1:1 models in the education system ; promote the use of effective practices in the area of mobile learning development and 1:1 model implementation ; improve understanding of the drivers and mechanisms of effective practices and policies ; contribute to the adaptation and/or scaling up of effective initiatives as well as to produce guidance and recommendations for implementation in other contexts
Targeted countries and / or region (s)	Colombia, Costa Rica, Peru and Uruguay
Start and end date	2014 - 2016
Total project budget (Euro) and activity budget	Project budget: NA IIEP's regular budget: NA Extra budgetary resources: NA Activity budget: NA IIEP's regular budget:NA Extra budgetary resources: NA
IIEP's research priority	**Improved cognitive and non-cognitive learning outcomes**

Project title	Aprendizaje Movil
Resources mobilised to conduct the activity (Human and Financial)	This project was exta-budgetary (external source). Financial resources were covered by a Nokia grant, who was interested in developing the concept of connectivity. For each country report, a consultant specialist was chosen to carry out the mission, under the supervision of IIEP – Buenos Aires (led by Maria Teresa Lugo and Violeta Ruiz). An Advisory Council was constituted, made up of a group of international experts specialised in the design and analysis of public policies focused on information and communication technologies. Its participation was planned to provide a critical review of the recommendations and utility of certain programs. Its members were: • Manuel Area Moreira (Professor of the Department of Didactics and Educational Research- Faculty of Education- University of La Laguna- Spain). • Raúl Katz (Director of Research Business Strategy, Columbia Institute for Tele-Information). • Margarita Poggi (Director of IIEP-UNESCO Buenos Aires Regional Headquarters). • Guillermo Sunkel (Consultant of the Social Development Division-ECLAC). • Francesc Pedró (Division of Lifelong Learning Policies and Systems of UNESCO's Education Sector).
Rationale for activity implementation	The rationale was originally to share best practices on the implementation ICT in education, so that the material produced ultimately serves the countries interested in implementing similar programs. Indeed, there was a need to show how ICT could improve education results and lead to greater social inclusion and democratisation of education systems. With the perspective of education as a fundamental right, the incorporation of ICT in education could ultimately bridge the digital divide, improve equity and reinforce the quality of education, especially in regions undergoing problems with education inequality.
Description of activity implementation	• The case study for each country is developed by an international expert on the subject under the direction of the IIEP UNESCO Buenos Aires, in coordination with the Division of Lifelong Learning Policies and Systems. The consultant was expected to conduct a field mission in the country of analysis. • A quantitative-qualitative methodology was used, focused on the survey, analysis and interpretation of primary and secondary sources. For the collection of information, a one-week field mission was carried out in each country, • The consultant was asked to outline 9 potential academic institutions, managed by public authorities in which the program was implemented for at least a year. The selection of 9 schools was also determined by its geography: 3 schools had to be in urban areas, 3 in peri-urban areas, and 3 in rural areas. • The consultant then had to conduct at least 6 interviews with key informants (director of the program, officer of teacher training, officer of technology) and other relevant stakeholders directly involved in the implementation of the program under analysis (administrative board, teachers, students). • The data collection and analysis work was guided by an analysis matrix which considered four components of ICT policies in education: *governance and management; infrastructure, access and connectivity ; digital resources ; use and appropriation.*

Project title	Aprendizaje Movil
Activity outputs	• A country report for each country. The objective of the reports were to assess the viability, practicality, and relevance of ICT in education policies. Each report was structured so as to include the national context, the background of ICT policies, description of the program, an analysis of the outcomes (strengths and weaknesses), and conclusions and recommandations.
	• Revision comparativa de inicitativas nacionales de aprendizaje movil en America Latina. The intention is to offer elements for the strengthening of each initiative as well as considerations for its applicability in other contexts. The study is structured as follows: conceptual and methodological framework ; socio-economic setting ; politics of ICT in pilot countries ; main features ; conclusion and recommendations for continuity.
	• August 2016 Conference. This reunion took place at the IIEP Buenos Aires Office. Its objective was to discuss the main conclusions of the Revisión Comparativa de Iniciativas Nacionales de Aprendizaje Móvil en América Latina. It brought together the main stakeholders of each country program.
Evidence of activity outcomes	The objective was to create change from a policy perspective, but also from a behavioural perspective. Before 2012 - 2014, mobile learning was seen as a danger to teaching since it could distract students. Until then, for example, cellphones were forbidden in classrooms in most countries. Furthermore, many education ministries focused on the PISA test as the main reference point with regards to education planning in their countries, without necessarily questioning the process that leads to higher results. The publication of the report provided evidence that ICT in education was in fact a steppingstone for better results in math, science, languages etc. Uruguay especially, but also Costa Rica, were regarded as pioneers with regards to using ICT in education. From a policy perspective, the study of national reports, which are often in close collaboration with education ministries can provide data and information. The research serves as proof with regards to specific metrics. If a metric is, for example, "number of laptops / number of students" in each school, than it will be easier to map out the distributional differences between rural and urban schools with the goal of improving equity in education.
Assessment of activity contribution to observed outcomes	• The project was successful in the sense that it reinforced the view that UNESCO was a reliable voice in the research it was doing for ICT in education. The publications helped schools and governments change their minds with regards to the possible advantages that ICT in education could have, an example being that the project was recognised by USAID. Indeed, IIEP were among the first to introduce the idea of promoting ICT in education, not only through communication with a variety of stakeholders but through actual evidence around the world. This raises the interest by several ministries regarding issues of connectivity.
	• Capacity building. Many of the countries in Latin America face the same challenges (rural disparities, operational capacity, internet connectivity, literacy rates, dropout rates). Sharing best practices amongst each other allowed participating countries to create a shared voice to the government and put pressure on education ministries with regards to access to education. Uruguay, for example, was the first country in the world to commit itself to a plan to ensure one computer per child and teacher in the public education system. Sharing the methodologies and results with Colombia, Costa Rica and Peru allows those countries to legitimise their own ICT initiatives (evidence-based planning) and pressure their governments to increase budget for their program.
Enabling factors and/or obstacles to research uptake and policy learning	• One enabling factor was the methodology and implementation of the research. Indeed, the activities were rolled out as a research project, which allowed for a more academic perspective. The beneficiaries thought this was beneficial since it allowed to get the most information out of all participants (not a "one size fits all" perspective).

Project title	Aprendizaje Movil
	• The main challenge was that the concept of ICT in education at the time was relatively novel in 2014. The fact this was completely new meant that a major challenge was to find relevant data (who has access to mobile phones?), and also that the consultants in charge of doing the field work had limited first-hand experience on mobile learning. • The way in which the results are written or published must respect certain rules. Some stakeholders mentioned the difficulty of publishing information that can be used against the government. This creates political damage or could expose corruption. Certain interviews were conducted with government officials at a very high level, so there is a tension between the "investigative" aspect and the "research" aspect.
Lessons learned and recommendations	Overall, the project proved to be successful at an individual level for the authors of the reports and for the members of the country initiatives. The research was aligned with their priorities, and most importantly gave them access to very relevant information. The sharing of best practices, especially with regards to institutional management and leadership promoted the motivational ability of actors to initiate change. Representatives from the country initiatives also appreciated the multi-faceted aspect of the research and the intersectionality of practices. This allows stakeholders to consider aspects in education planning that they hadn't concerned. It was recommended to make the results of the research much more accessible to the general public. Making a shorter, more concise publication could help democratise the information for NGO's, academics, and teachers alike. Another recommendation was to ensure a follow-up, as simple as a questionnaire for example, to all stakeholders involved in the project. Indeed, the value of the project was the creation of a network of like-minded individuals with similar objectives and policy goals.
Sources of information and interviews conducted	• Four Country Reports: Colombia, Costa Rica, Uruguay, Peru • Summary of 4 country reports: Revisión comparativa de iniciativas nacionales de aprendizaje móvil en América Latina • Documento 2 Matriz de Analysis • Agenda Definitiva para reunion 2021 • Orientaciones a los paises relativas al trabajo de campo • Estudio Revision Comparativa Politica TIC consejo asesor • Interview Guide • Interviews conducted with Francesc Pedro (Supervisor of the project), Ana Rivoire (author for Peru Case Study), and Fernando Bedoya (Executive Director of Colombia's Computadores para Educar).

A.16   National Education Accounts (NEA)

Project title	**National Education Accounts (NEA)**
Name of research project	Improving national reporting systems on financing flows
Project leader	Ousmane Diouf
	UNESCO International Institute for Educational Planning, UNESCO Institute for Statistics, Pôle de Dakar, Global Partnership for Education.
Project objectives	The objective of the project was to improve quality of education finance for national and international policy-making. Specifically, the project aimed to
	• develop, test and agree on methods for: tracking budget allocations within the country to assess equity, estimating private expenditures on education, monitoring external contributions to education
	• develop international expertise and methodologies on National Education Accounts, and put them into practice by implementing comprehensive NEAs in two countries.
	• Set up/harmonise sustainable methods for the collection, reporting and analysis of government expenditure on education.
	To reach these objectives, all countries received technical support in collecting and analyzing government expenditure on education data.
	Each of the 8 participating countries were split into 4 streams (A, B, C, D): public resources allocation within the system (Guinea and Zimbabwe), tracking household expenditure on education (Vietnam and Côte d'Ivoire), external funding for education (Senegal and Lao PDR), and a combined work of stream A, B, and C in order to conduct a complete National Education Accounts.
Name of project activity	National Education Account Project - Beneficiary Country Report
Description of the activity being analysed, expected objectives & target populations	Monitoring of government expenditure on an annual basis was put in place and used for national sector planning. The research questions that were to be answered by each country report were: how much does education cost? Who finances it? What are the financing and costs structures at different levels of education? The target populations were national education planners (Ministries of Education)
Targeted countries and / or region (s)	Africa and Asia
	Guinea, Zimbabwe, Côte d'Ivoire, Vietnam, Senegal, Lao PDR, Nepal, Uganda
Start and end date	September 2013 – July 2016
Total project budget (Euro) and activity budget	Project budget: IIEP's regular budget: NA
	Extra budgetary resources: Fund granted by GPE. $US 2,119,074 ($US 1,980,443 activity grant + $US 138,631 agency fee).
	Activity budget: NA

Project title	**National Education Accounts (NEA)**
	IIEP's regular budget: NA
	Extra budgetary resources: NA
IIEP's research priority	**Governance and accountability for transparency and participatory planning**
Resources mobilised to conduct the activity (Human and Financial)	Internal human resources include two senior education specialists from GPE, three members from IIEP Paris, three policy analysts from IIEP Pôle de Dakar, and five specialists from UIS.
Rationale for activity implementation	The overall goal of the activity is to seek a more consolidated picture of the economy of education in each country. Different sources of data and the complexity of education finance flows makes it difficult to monitor education activities: sources of funding for education are varied between public records (at a national or local level), school reports, household surveys. The goal was to build a methodology that would streamline all of that data and organise it into a way so that it "matches" in order to identify how much is spent, by whom, and for what. The project is in line with SDG 4, and specifically 4.1: By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes.
Description of activity implementation	- Setting up a national team. Once a coordinator is designated for the project, a national team is formed composed of senior staff from education ministries (depending on how the education sector is overseen in each country), finance ministries (national institutes for statistics), and/or other relevant government bodies (planning and evaluation offices). - Mapping of financial flows and data collection. The team gathers data from various sources based on a specific NEA methodology in order to ensure consistency (definitions, classifications, and terminology). One main aspect of the NEA methodology, for example, is to differentiate producing units (schools, universities, research institutions) and financing units (government ministries, corporations, households, non-profit institutions). - Sets of sources for a full National Education Account are the following : central government funding (government financing from budget execution documents by Ministries of Finance and Education), local government funding (individual financial statements of each local authority), external funding (mainly obtained from development budgets, donors under off-budget funding, or international partnerships), households (mainly obtained from surveys to collect data on average expenditure by level of education, categories of schools and items of expenditure), NGOs (collected through surveys) and religious organisations (who manage private schools and fund certain educational activities). - Data Processing. Data is processed during workshops and training sessions led by IIEP (budget data treatment & EMIS data analysis). These workshops allowed team members to classify expenditures in subsectors (infant education, junior or secondary, etc.) and level of activity (administration, teaching, investment). - Dissemination of results at the national level. Key results are presented to senior officials in ministries, or to external stakeholders (NGOs, teacher unions, civil society organisations).

Project title	National Education Accounts (NEA)
Activity outputs	2016: Each country report is published. - April of 2016: members of the team for each country were invited and participated in the international NEA workshop help at IIEP in Paris to present their main findings. The conference was also attended by external participants from UNICEF, the World Bank, AfD, OECD, and Brookings Institute. - Publication on UIS website "National Education Accounts: getting the full picture on education finance". - Publication on IIEP website "National Education Accounts: a catalyst for change". The publication includes a link to a powerpoint used by the Global Partnership for Education who hosted a Webinar on September 1st 2016. - Publication on UIS website "Methodology of National Education Accounts", which proposes a novel methodology built on existing international standards (System of National Accounts & International Standard Classification of Education).
Evidence of activity outcomes	- Internal Discussions. For each country activity, key results from the reports were presented by senior staff of the team to other government officials, NGO's, international organisations, teacher unions. The presentations were often followed by debates on equity (or lack thereof) and discussions on next steps. The Honourable Minister in Zimbabwe, for example, expressed the relevance of the project and assured the team that the key takeaways would be taken into account in the preparation of the Education Sector Strategic Plan 2016-2020. - Dissemination of results through national media. Many countries followed the Uganda Communication Strategy, whose objective was to share the results both nationally and internationally. As such, the extraction of main findings were presented to journalists in order to assess comparability with global goals. Press releases were published in Uganda, Senegal, and Lao. - Key findings were easily accessible : countries spend more on education than normally assumed (as a percentage of GDP), households are major funders of education (excessive burden on family finances), and ministries of education are not always the main government funders (when taking into account emergency programmes, civil service commissions, tertiary institutions, or localised provinces or districts).
Assessment of activity contribution to observed outcomes	The major success of the project was creating a "shock effect". Before the program, Uganda and Nepal seemed to be spending roughly 2% and 4% of their GDP on education respectively. After the program, Nepal's contribution to education spending represented 9.3% of GDP. Senegal was able to internalise the NEA methodology to develop a national expertise in education financing analysis. The country was able to install its own program to harmonise the collection and transmission of data in the policy-making process, and launch statistical campaigns of administrative data. Their program STAT'EDUC2, (which was initially put in place by IIEP) allowed to integrate different experiences of local districts and government partners. For the statistical campaign of 2019, the government developed a new tool called KOBO to integrate data from schools and included professional insertion, based on different economic sectors (primary, secondary, tertiary). Although the variables used in KOBO are essentially the same than those used in NEA, Senegal was able to develop sufficient human resources dedicated to the project in order to adapt the variables to the local context. One of the key findings for Zimbabwe was that 90% of education expenses were going towards teacher salaries. As a result, the government announced that it would increase the budget towards investment in infrastructure and equipment, which are unequally distributed across the country. Teacher salaries ended up representing 50% of expenditure 2 years after the publication of the report. Similarly in Uganda, it was found that 81% of the Ministry of Local Government expenditure was allocated to salaries and only 4% to capital expenditure. The ministry of education planned for investments in school supplies and scholarships to increase.

Project title	National Education Accounts (NEA)
	Certain countries with insufficient human resources who did not conduct a full NEA (stream A, B, or C) were able to continue part of the NEA with the technical aid from the World Bank, and incorporate missing funding sources into their data.
Enabling factors and/or obstacles to research uptake and policy learning	Due to the technicality of the project, a recurring obstacle was the gathering of comparable data. One case is where the data is heavily decentralised with multiple ministries, overlapping local authorities and districts, making the mapping out of flows confusing. Another case is when the finance data is owned by the Ministry of Finance, in which case the access to that data heavily depends on the willingness of the ministry to give access, and in general on the culture of sharing data in the country. Here, although local governments generally have a better sense of education needs (recruitment, textbook, student outreach), regional budgets are ultimately decided at a central level.

With regards to its effectiveness for long-term policy learning, the main issue regards sustainability. The grant lasted 2 years, and most countries who were very keen on developing the project further (Côte d'Ivoire) did not have the technical or human resources to effectively internalise the NEA methodology into their own education planning (Senegal being the exception).

Another challenge was the fact that the project was novel and based on trial and error. One interviewee mentioned the metaphor of "building the plane and flying it at the same time". Training by UIS and IIEP occurred through 4-6 field missions in the country of study for 2-year period. A challenge in this regard was that they were developing a methodology at the same time as the data was being collected. The language barrier in these trainings was also a barrier.

A particular tension was mentioned with regards to the level of scalability and adaptability to a certain context. One of the objectives of the project was to publish data internationally and propose a methodology that works both for the country and for international comparison. Although country project leaders were appreciative of the level of the adaptability that was given, it was difficult to achieve this second objective of international scalability.

A major enabling factor with regards to IIEP exposure was the level of confidence that planning officers had to pursue their research. Researchers were not only carrying out the data collection, but were also entrusted with presenting the findings to senior managers and government officials. |

Project title	National Education Accounts (NEA)
	Likewise, the involvement of different stakeholders upheld both confidence and prioritised future education planning. The fact that results were shared with organisations, unions, associations and NGOs other than government ministries meant that these organisations could then review their strategic objectives with regards to education to "fill in the gaps".
Lessons learned and recommendations	The value of the project revolves around the building of the NEA methodology. Indeed, the health sector had already developed such a methodology and the education sector was lagging in this regard. The potential that this methodology has on education planning can be very important, but it needs follow-up. When developing a methodology, it is important to train people to give ownership to that mechanism. The follow-up and scale-up were not integrated into the design of the project and should be strategised from the very start of the implementation phase. The research is extremely valuable, but it is the IIEP's responsibility to "knock on the government's door" and request feedback.

It was noted during the interviews that the NEA project resembled a pilot program. If results of the research activity indeed produced a "shock effect", it is expected that the methodology, and more specifically its implementation, must be developed further. If the goal of IIEP's research activities is to fully contribute to long-term education planning, then the follow-up and continuation of the project requires significant human and financial resources. Human resources need to be centralised at the national government level and financial resources are required for data analysis methods. This mixed approach would allow governments and statistical bureaus to surpass descriptive analysis of data and incorporate internal efficiency and efficacy. All education planners interviewed have a positive view of the project and look forward to future partnerships.

Regarding the dissemination of results, it was noted that the IIEP had rouble translating complete methodological findings into key messages. IIEP tended to write very long and technical reports. The short report published on the UIS website containing a couple lines explaining the results of the countries has been cited and circulated more widely.

The NEA project is aligned with SDG 4 on securing equitable education for boys and girls. It has been suggested to expand on the results of the NEA project with regards to (in)equitable |

Project title	National Education Accounts (NEA)
	outcomes by researching what type of investments are needed. Lessons from Covid-19, for example, have shown that many schools without ICT in education have left some schools beyond (especially rural). The question is then how to access these children and in which way.
Sources of information and interviews conducted	Interviews conducted: - Elise Legault (UIS) - S. Mugari (Planning officer, Ministry of Primary and Secondary Education, Zimbabwe) - Oumar Diedhou (Chef du bureau suivi évaluation, Ministère de la Formation professionnelle, de l'Apprentissage et de l'Artisanat, Senegal) - Ms. Audrey Kemigisha (Statistician, Uganda Bureau of Statistics) Sources of Information : 1. National Education Accounts UNESCO UIS 2. Atelier Final Paris Avril 2016 3. Rapports Pays 4. Guide Méthodologique CNE 5. Infos Générales 6. Présentations Méthodologiques 7. Présentations Pays 8. 51_2016_GPE-GRA_Finance_NEA_Final_Activities_Report 9. Media Coverage 10. Getting the full picture of education spending: http://www.iiep.unesco.org/en/getting-full-picture-education-finance-national-education-accounts-3669 1. Blog on GPE following national launches: https://www.globalpartnership.org/blog/how-national-education-accounts-are-spurring-change 2. Launch in Uganda: http://www.iiep.unesco.org/fr/node/3598 3. Article on the seminar for the research: http://www.iiep.unesco.org/en/national-education-accounts-pathway-improved-tracking-education-financing-flows-3507 4. Launch of the education commission report with NEA input: http://www.iiep.unesco.org/en/launch-education-commission-report-how-finance-learning-generation-3656

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