



Front Cover: Primary school, Rwenzori, Uganda.
Photo: Anne O'Keefe

'WORKING TOGETHER FOR BETTER OUTCOMES'

**A Public Expenditure Review of
Development Cooperation Ireland's
Support for Education in Uganda and Zambia**

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ACRONYMS

ADP	Accelerated Decentralisation Process
AIDS	Acquired Immune Deficiency Syndrome
AIMES	Action to Improve English, Mathematics and Science
BESSIP	Basic Education Sub-Sector Investment Programme
CSP	Country Strategy Paper
DAC	Development Assistance Committee
EMIS	Education Management Information System
FAWEZA	Forum for African Women Educationalists of Zambia
GNP	Gross National Product
HIPC	Heavily Indebted Poor Countries
HIV	Human Immune-deficiency Virus
IA	Ireland Aid (former name of Development Cooperation Ireland)
IDTs	International Development Targets
MDGs	Millennium Development Goals
PERP	Primary Education Reform Programme
PAF	Poverty Action Fund
TDMS	Teacher Development and Management Strategy
UNAIDS	United Nations AIDS Agency
ZANEC	Zambia National Education Coalition
ZATEC	Zambia Teacher Education Course

1. EXECUTIVE SUMMARY

- 1.1** The Expenditure Review Initiative is an annual systematic process of evaluation conducted by each Government Department. The objectives of the reviews are to analyse Exchequer spending in a systematic manner and to provide a basis on which more informed decisions can be made on priorities within and between programmes. Within Ireland's official programme of development assistance, support to education typically accounts for approximately 18% of the total budget. This study draws heavily on the findings of the comprehensive 'Joint Donor Evaluation of External Support to Basic Education in Developing Countries 2000-2003'. That evaluation was commissioned and sponsored by a group of thirteen international development agencies, including Ireland, and conducted by an independent international team on their behalf and included Uganda and Zambia as two of the four countries studied. It is also informed by various Joint Annual and Semi-Annual Sector Reviews in the aforementioned countries, and specific reports commissioned by Development Cooperation Ireland.
- 1.2** In the years 2000 to 2003, Development Cooperation Ireland expenditure on education amounted to €153 million. Of this, €26.2m was spent in Uganda and €19m in Zambia primarily on various components of basic education. This report focuses on the expenditure in the education sectors and systems of both countries. Analysis concentrates particularly on the outputs and outcomes of expenditure rather than on the inputs, providing a more valuable measure of the contribution which the committed resources have made. In doing so, the report importantly highlights the modalities used and the partnership arrangements established. It examines the extent to which the programme objectives have been achieved; the overall effectiveness of the support; accountability structures within the programme (including the performance indicators used to monitor the programme). Finally, it assesses the progress made in the education sector in the countries concerned in the context of agreed targets.
- 1.3** This Public Expenditure Review is also set in the wider framework of major global initiatives which have driven much of the development agenda in general and the education sector specifically, over the past two decades. Universal Primary Education and Gender Equity by 2015 are amongst these major goals. The report identifies the changing nature of support introduced over the same period - in particular the move away from projects dominated by funding agencies towards various forms of budget support and sector wide programmes - led by the governments of the developing nations themselves.
- 1.4** The scale and objectives of Ireland's bilateral country support are determined through a process of dialogue both within Development Cooperation Ireland (headquarter and field office levels) and the respective partner countries. This process is ultimately manifested in a three year budgeted plan set out in a Country Strategy Paper (CSP) for each country. For support to Education, the Irish Programme has clear guidelines for policy and practice. The commitment of the governments of Uganda and Zambia to sector-wide approaches and Ireland's cooperation in support of these programmes has particular significance for this Review. It demonstrates that the performance of this support to education development in Uganda and Zambia needs to be seen largely in terms of the performance of the sectoral programmes as a whole.
- 1.5** A key element of most of Development Cooperation Ireland's country programmes is an engagement at District level. These programmes are designed to respond to local needs and challenges and assistance is typically channelled through specific regional administrative entities. Two case studies have been included to exemplify this approach.
- 1.6** Recognising that HIV/AIDS has become one of the greatest negative forces against development in poor countries, the Irish Government has a strong commitment to support and engage in the fight against it, including within the education sector.

Uganda

- 1.7** Uganda is a very poor country which has managed to introduce and adhere to strong mechanisms for aid management – financial and overall implementation. It has adopted a sector wide programmatic approach to education which, in general, is viewed as a model of good practice and has attracted increasing volumes of financial and technical support from the international donor community, including Ireland. Importantly, it has also lowered the prevalence rate of HIV/AIDS which has had significance for the country in general and the Education sector specifically.
- 1.8** Uganda has achieved a significant increase in enrolment of primary school age children, an improved pupil: teacher ratio, a narrowing of the gender gap, increased construction of classrooms and improved the provision of learning materials.
- 1.9** Ireland's official assistance to education, with the exception of the District Programmes, is disbursed through Government of Uganda systems. Support increased over the period of the Country Strategy Plan, reflecting (i) the confidence which Development Cooperation Ireland had in those systems; (ii) Uganda's commitment to the Education sector and (iii) the soundness of its sector governance structures. While Ireland's commitment encouraged other donors to contribute funds through the government budget, it is also seen as a key contributor and has been the coordinating donor of the Education Funding Agencies Group thereby giving it a highly central role. However, the sector programme process results in a heavy workload for officials of the Ministry of Education and Sport and for representatives of the donors.

Zambia

- 1.10** Zambia is one of the poorest countries in the world economically and is suffering heavily from the effects of HIV/AIDS. Its education system has also been in crisis with very low levels of provision and achievement. As in the case of Uganda, a programmatic approach was adopted in 1999 for the education sector, with the two main objectives being increased enrolment and improved learning outcomes. Ireland and other bilateral donors have energetically supported this programme. However, a major finding of the Programme's Mid-Term Review in 2002 was that Zambia has found it difficult to do much more than arrest the decline of the education system and provision, albeit with some modest gains.
- 1.11** Ireland was an enthusiastic participant in the early stages of the sector programme process and was one of the first donors to agree to channel funds through the government system. At the same time it took the decision to integrate its Provincial level support into the sector programme while maintaining its involvement at local level (in Northern Province). It was instrumental in piloting a literacy programme developed by the Department for International Development (United Kingdom) which was a major success and has been scaled up nationally. This development also demonstrated the value of external partners working together and complementing each others' contributions to the overall benefit of the system.
- 1.12** Conclusions:
- The Irish programme is committed to a collaborative and harmonised approach, thereby making highly significant contributions to coherent education programmes in both countries;
 - For both countries, programme inputs, processes, activities and outputs are largely consistent with the Ireland's education policy and practice guidelines.

Development Cooperation Ireland has become a valued participant in the development of the sector approaches;

- A key dimension of the sector-wide approach is the acceptance that individual financial contributions of bilateral donors are not identifiable within the general pool of resource provision from all sources when supporting an overall programme;
- Education development has been narrowly focused on the provision of primary schooling but is now being broadened to include other sub-sectors. However, overall poor quality, both in terms of delivery and materials, remains a major issue;
- The Irish support is also respected for the extent to which it is well-grounded, especially as a result of its experience gained through its engagement at District and Provincial levels;
- In order to refine Ireland's contribution to the cooperative and harmonised processes to which it is committed, the development of enhanced evaluation tools is required to capture its discrete interactions, analyse their quality and impact;
- Analysis of the high-level skills, competences and personal attributes is required in order to refine recruitment and training of programme staff. This is particularly important for Development Cooperation Ireland, as having a mix of staff skills and attributes, including both core professional expertise and broader negotiation and facilitation skills, competences and attributes, are some of the essential qualifications for effective contribution to the programmatic approach;
- The education sectors in both countries have not yet adequately responded to the HIV/AIDS disasters;
- For sector programme approaches to be fully inclusive of Civil Society stakeholders, the latter need to be helped to organise themselves into stronger umbrella organisations, representative of many different Non-Governmental and Civil Society Organisations.

1.13 Recommendations

Development Cooperation Ireland should:

- Make a commitment to longer-term engagement in the programme countries beyond the current 3-year approach;
- Continue to play an active role in the sector-wide approaches in both countries through the provision of its human and financial resources;
- Continue to be engaged in District-level support, deriving essential feedback on how sectoral programmes are working at local level and scale, and providing opportunities to pilot innovations which can then be scaled up;
- Continue to advocate for a widening of the programmes beyond primary education both within Development Cooperation Ireland and in partner countries;
- Refine its internal reporting mechanisms to enable it to identify the unique role it is playing in sectoral programmes; accept and adopt common sector programme reports and avoid parallel reporting except where it is to identify its own key role;
- Consider carefully the mix of competences which it requires its staff to have, taking into account the requirements of sectoral approaches for expertise which is more "upstream" in terms of policy dialogue, and to provide opportunities for appropriate staff development;
- Consider innovative ways to manage increasing budgets while restricting administration costs;
- Review how much active engagement in the education sectors is required as sector programmes mature.

2. INTRODUCTION

2.1 This study is an Expenditure Review analysis of Development Cooperation Ireland's support to the education systems of Uganda and Zambia during the period 2000-2003. The general objectives of these Reviews are to analyse, in a systematic manner, what is being achieved by Government of Ireland expenditure and to provide a foundation on which to base more informed decisions on priorities within and between programmes. Such studies focus particularly on the outputs and outcomes of expenditure rather than on the inputs, on the understanding that such a focus is of more value in providing a measure of the contribution which the committed resources have made to the projects and programmes under consideration. In the context of assistance to developing countries, this approach highlights the progress made for example, on improving access to quality education, rather than merely identifying what financial contributions were made to the sector as such.

2.2 The review presents an analysis of Development Cooperation Ireland's support to the education sector in Uganda and Zambia. It examines the objectives of that support, and reviews their validity and compatibility with Ireland's overall official assistance to these countries. The study analyses the nature of Development Cooperation Ireland's support over the period, notes the modalities used and the partnership arrangements established. It examines the extent to which the programme objectives have been achieved and the overall effectiveness of the support.

2.3 The study reviews accountability structures within the programme, including the performance indicators that are used to monitor the programme and assesses the progress made in the education sector in the countries concerned in the light of agreed targets.

2.4 The review draws primarily on the findings of a comprehensive Joint Donor Evaluation of External

Support to Basic Education in Developing Countries, carried out between February 2001 and July 2003. This evaluation was commissioned and sponsored by a group of thirteen international development agencies and was conducted by an independent international team. Representatives of these agencies, together with participants from the countries in which the study was undertaken, formed an Evaluation Steering Committee to oversee the work. The review focused on four countries, Uganda, Zambia, Bolivia and Burkina Faso and concentrated on: the nature and evolution of external support to basic education; externally supported basic education; and partnership for basic education development. These three components were addressed at three different levels: intents, policies and strategies; practices and finally, results and consequences.

2.5 The Review has also drawn on various other documents and interviews. The interviews were with Development Cooperation Ireland staff while the documents reviewed have included general and country-specific programme documents, annual and semi-annual sector reviews made by the Ministries of Education in Uganda and Zambia which focus mainly on process, progress and expenditure. Finally, this report also takes into consideration a number of other relevant research papers and evaluations carried out during the period of review. It was not however, possible to undertake specific country level field work.

2.6 Given that two of the four countries selected for study, Uganda and Zambia, are also the subject of this study and that the timescale approximates to that of the Expenditure Review period, the descriptions, analysis, conclusions and recommendations of the evaluation are of special significance to this work.

3. CHANGES IN DEVELOPMENT COOPERATION

(a) The What

- 3.1** Over the past 25 years, there has been a growing realisation that education has the potential to be the single most important element in combating poverty, empowering women, promoting human rights and democracy, protecting the environment and controlling population growth. Receiving a good education is also seen as one of the surest ways by which people can improve their social and economic status. Similarly, a well-educated population is seen as one of the key requirements for improving the quality of life through sustainable economic growth.
- 3.2** While in the period leading up to 1990 there was much international agreement and activity centred on the importance of education in the developing world and the need to provide support to secure it, the most significant initiative was the World Conference on Education For All held in Jomtien, Thailand in 1990. The Conference agreed that a joint international effort would be made to achieve that goal of Education for All by 2000. However, in 2000, there were still an estimated 115 million school age children who were not in school.
- 3.3** Subsequently, a number of international goals were brought together and expressed as The International Development Targets (IDTs). These included two specifically related to education: Universal Primary Education for All by 2015 and Demonstrated progress towards gender equality and the empowerment of women by eliminating gender disparity in primary and secondary education by 2005.
- 3.4** The decade which followed the Jomtien Conference was one of growing international commitment and collaboration on the part of developed and developing nations and assistance organisations to achieve the goals but it was also marked by a growing concern that the targets might not be met. These concerns culminated in the World Education Forum in Dakar, Senegal, in 2000, which assessed the progress made towards their achievement and strengthened commitment by adopting '*The Dakar Framework for Action: Education for All, Meeting our Collective Commitments*'.
- 3.5** In September of the same year, the UN Millennium Summit identified the Millennium Development Goals, which made minor modifications to the IDTs for education, defining the goals as (i) to ensure that by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling, and (ii) to eliminate gender disparity in primary and secondary education preferably by 2005 and in all levels of education no later than 2015. (It should be noted that the emphasis for the first goal shifted to the completion of six years of basic education.)
- 3.6** The enthusiasm and commitment generated at Jomtien might have been expected to result in significant increases in the amounts of money going to support education in developing countries, but in practice there was not a significant increase in financial inputs during the decade up to the Dakar Conference.¹ A later study, following the Dakar Conference, found that there had been very modest gains, if any, and indeed it was estimated that there was a very large funding gap between the external resources needed and those currently being provided to partner countries.²

1 (Final JDR p 20, quoting Bentall, et al).

2 (UNESCO 2002, quoted in Final JDR)

3.7 It was estimated that about US\$ 4.72 billion in 2000 was available from all sources, of which about US\$1.45 billion was provided from external sources. It was reckoned that this was only about one quarter of what would be needed each year to achieve Universal Primary Education alone. A linked outcome of the Dakar Conference was a commitment to provide additional funds quickly through what has become known as the Fast Track Initiative. This initiative is aimed at identifying those countries with either a good policy environment or the clear intent to develop one and then to use financial and non-financial aid to reinforce their strong performance³. Uganda and Zambia were both included among the 18 countries considered for the Fast Track in 2002, but in fact neither was included for funding later that year.

(b) The How

3.8 As outlined above, there have been a number of important global initiatives impacting on the development agendas of poor countries. However, over the last decade, broader more multi-sectoral, national-level frameworks have and are being developed into which education programmes are streamlined. These larger frameworks, known generically as Poverty Reduction Strategies, have attempted to provide a holistic and coordinated approach to development planning and management. While the original motivation to prepare these strategies was to qualify for debt relief under the Heavily Indebted Poor Countries initiative, they have now become the major instrument by which host Governments, their populations and donors agree poverty reduction priorities and harmonise support towards the fulfilment of these strategies.

3.9 From a donor's perspective, this requires a commitment to ensure that its support is both (a) consistent and coherent with the overall objectives of the strategies (b) its financial support is delivered through modalities which maximise efficiency and effectiveness. For further details concerning the modalities used by Development Cooperation Ireland, please see Annex 2.

3 (JDR Doc Rev p33)

4. DEVELOPMENT COOPERATION IRELAND POLICY

General

4.1 Development Cooperation Ireland is the official development cooperation programme managed by the Department of Foreign Affairs. Overall, it has a strong focus on poverty reduction and on partnership with the developing countries and other agencies with which it cooperates. It aims to devise and implement high quality development cooperation programmes, with assistance channelled mostly to least developed countries. Ireland provides assistance through contributing its share to the multilateral agencies such as the World Bank, and also the European Union, in addition to operating bilateral programmes with seven of the world's poorest countries. Within its bilateral programme funding, it typically devises three-year Country Strategy Papers which outline the primary objectives and funding commitments to partner country over the particular time period. It continues to prioritise support to the education and health sectors, and is also strongly committed to fighting the HIV/AIDS pandemic. It has been acknowledged⁴ that in terms of the guiding principles by which it operates, Ireland is at the cutting edge of international development policy.

4.2 An important feature of Ireland's commitment to poverty reduction has been the increase in financial allocations over the past fifteen years or so, rising from \$ 70 million in 1992 (0.16% of GNP) to \$ 398 million in 2002 (0.40% of GNP). In 2000, the Irish Government committed itself to reaching the United Nations target of 0.7% of GNP by the end of 2007, implying that assistance by that time would reach some \$ 1 billion. However, the target is now unlikely to be met by 2007 and a new date is being discussed.

Education Policy and Guidelines

4.3 Development Cooperation Ireland has a clearly articulated policy and practice for its support to education in developing countries ('*Education policy and practice guidelines IA 2001*'). Prepared for use by Development Cooperation Ireland officials, partners, programme and project staff, management agencies and consultants, the document guides "*partners and implementers of IA policy in refining strategies in ways that will improve teaching and learning in the classroom and ultimately help impact on poverty*".

4.4 Development Cooperation Ireland considers basic education for all to be a human right and a prerequisite for sustainable development. Its overall aim is to assist partner countries to build sustainable education systems appropriate to the needs of the people and the country. While subscribing to the goals and targets set internationally, Development Cooperation Ireland supports the achievement of locally set objectives which are developed in consultation with stakeholders in education in the countries concerned. These broadly include: improving access and equity, enhancing quality and relevance and strengthening institutional capacity to develop and implement an appropriate and sustainable education system. Development Cooperation Ireland is also particularly concerned at the impact of HIV/AIDS on the education sector in sub-Saharan Africa.

4.5 During the 1990's, Ireland's assistance became increasingly focused on support through sector-wide approaches, committing it to the principle that "*All significant funding supports a single sector policy and expenditure programme under Government leadership, adopting common*

4 DAC Peer Review 2003.

approaches across the sector, with progress toward using Government procedures to disburse and account for funds" (Lister p49). This approach also implied that it is a process, a trend towards a more fully coordinated and harmonised process which in practice is probably not likely to be fully achieved. Furthermore, as the Guidelines stressed, "there is no blueprint or prescription for the modalities involved" (p20), indicating that each sector programme would have unique features and is a unique process within a particular political context. As noted above, with this approach individual international partners, including Development Cooperation Ireland, subordinate their specific objectives for educational development to the overall, shared programmatic objectives for the sector.

4.6 The performance of Ireland's contribution to the educational development of Uganda and Zambia has therefore, to be measured largely in terms of the performance of the sectoral programme as a whole. It is neither feasible nor consistent with the overall philosophy of sector programming to fully identify the individual donor's contributions and therefore it is only appropriate to evaluate the Irish contributions in the context of the wider performance of the programme.

4.7 However, Development Cooperation Ireland's policy recognises the value of maintaining an engagement in District-level support. The *Guidelines* indicate participation at District-level is a valuable source of information to inform participation at national level. In addition they identify a responsibility "to support districts to optimize their participation in the sector programme process by facilitating a more proactive, informed role for districts (Guidelines p30). The programmes of support in both countries have accordingly continued to provide assistance to specific regional administrative entities. These programmes have included projects which have been the subject of specific evaluations.

HIV/AIDS

4.8 Over the past twenty five years or so, HIV/AIDS has become one of the greatest negative forces against development in poor countries, especially in Sub-Saharan Africa. According to the Joint UN Programme on HIV/AIDS (UNAIDS), in the last twenty years about 65 million people have contracted the illness, and some 25 million of them have died. In addition to the destructive effect on individuals, families and communities, it has a fundamental negative outcome for the social and economic development, and possibly the stability, of the most affected countries. Life expectancy falls by almost a third, poverty is increased, economic growth is reduced, the collapse of education systems becomes a possibility.

4.9 HIV/AIDS is seriously compromising efforts to achieve the Millennium Development Goal of Education For All. In some countries, teachers are dying more quickly than replacements can be trained; many teachers are absent from their schools or are struggling to teach while ill; scarce administrators are being lost from the system; large numbers of orphans and child-headed households are being created. The diversion of funds from development activity to meet the direct and indirect costs of dealing with HIV/AIDS means that the education sector is also at risk from insufficient resources.

4.10 The Irish Government has a strong commitment to support and engage in the fight against HIV/AIDS, not least because the pandemic is having a powerfully negative effect on all the programme countries which Ireland supports in Africa. These countries account for over 25% of all the deaths in the whole world due to AIDS. They have one third of all AIDS orphans and an average of one in fifteen adults have been infected with the virus. In recognition of the need for an appropriate response to this challenge, Ireland Aid Advisory Committee developed a specific strategy, an *HIV/AIDS Strategy*

for the Ireland Aid Programme, in 2000. This strategy has steered Ireland's approach to HIV/AIDS, including recognition of the central role of education in fighting the pandemic. The HIV/AIDS element of the Education *Guidelines* document was significantly strengthened as a result.

- 4.11** The *Guidelines* identified clearly the relationship between HIV/AIDS and education, including the direct and indirect negative impacts on students, their families, teachers, education managers and administrators. They also identified the positive role which education could and should play in fighting HIV/AIDS, as at the time it was virtually the only 'vaccine' available for protecting the individual. For this reason, universal access to good quality education is seen as a crucial contributor to reducing the impact of HIV/AIDS.

5. UGANDA

Context

Irish official assistance to Uganda began in 1994 and increased in overall value from €900 000 to €33 million in 2003. Support to education has been seen as a high priority. A key strategy of the Irish Country Programme for 2000-2003 was to increasingly move towards a programmatic approach, including the provision of direct budget support to the Government of Uganda for the implementation of education sector plans, through a sector-wide approach, which had originally been launched in 1998. Development Cooperation Ireland has played a leading role among donors by seeking to promote through its actions and advocacy, the key structural features of the sector programme. Ireland has also continued to provide funds specifically earmarked for classroom construction under the Poverty Action Fund, for the Primary Education Reform Programme in the Rwenzori Area, and for three broader, multi-sectoral District-level programmes. The latter involved support to primary education activities in five poor districts, and was phased out in July 2003. The Irish programme has also supported expansion of the National Teacher Development and Management Systems Programme and continues to prioritise initiatives to combat HIV/AIDS and to promote gender sensitivity and equity.

This is detailed further in the sections that follow and in the Box.

5.1 Uganda is a very poor country, with over 35% of the population living below the poverty line in 2000, and the alleviation of poverty has remained a key concern for the government. Accordingly, on the initiative of the World Bank, a Poverty Eradication Action Plan in 1996 (a forerunner to the more nationally-owned 'Poverty Reduction Strategy Paper') was established following household-level participatory poverty surveys. This outlined policies to increase the supply and improve the quality of essential services, including education, and to promote community-based development. The planning and budgeting for these strategies takes

place within the Medium Term Expenditure Framework.

5.2 The country qualified for substantial debt relief (under the HIPC arrangements) from 1998 onwards, resulting in additional flows into the social sectors totalling \$40 million per year. This led in turn to the creation of a Poverty Action Fund which combines debt relief resources with funds from the various international funding partners for the support of priority projects. By 2000 a number of donors including Ireland, were contributing funds to the Poverty Action Fund, either in the form of general budget support or earmarked for sectors.

5.3 The Uganda government had made considerable progress by 2000 in organising its financial structures and systems. It developed a robust Medium Term Expenditure Framework, an element of which was devoted to prioritising and planning financial allocations to the education sector. This required all external donors to contribute their additional resources within the framework, thus contributing to the achievement of the government's goals and priorities. Most of Ireland's support is reflected in the Medium Term Expenditure Framework. As a budget support donor, Development Cooperation Ireland contributes to the discussion around the overall allocations to the sectors. Within the actual education sector programme, Embassy personnel also contribute to discussions around allocations within the sector.

5.4 By 2000 HIV/AIDS was seen as a very grave threat to the country. However, senior national figures, including the President, have given strong leadership to the drive to combat HIV/AIDS and this appears to have had a positive effect in lowering the rate of incidence of new cases, so that the prevalence rate has now dropped from approximately 20-25% in 1992 to 6.1% (CSP-Education sector paper p 11).

State of the Education Sector

- 5.5** In the post independence period, Uganda's education sector grew strongly in terms of school building and increased enrolments. In the 1970's and 1980's internal armed conflict resulted in serious stagnation, destruction and decline. A turning point came in 1986 with the establishment by the new popular government of an Education Policy Review Commission, which was given the task of reviewing and making recommendations for the development of education at all levels. Ultimately this resulted in the initiation of Universal Primary Education in 1997.
- 5.6** The economic context for educational development was quite strong, with growth figures of 7% for much of the 1990's and a government committed to devoting meaningful resources to the education sector.
- 5.7** Uganda responded to the international initiative of the Education For All Conference at Jomtien, by establishing a National Education Task Force, and by the time of the 2000 World Education Forum in Dakar, Senegal, the country had overtaken many others in its progress toward education for all. In doing so, it had sought to be inclusive of the many different types of stakeholders which had a part to play in determining the shape of the educational system and in contributing to the achievement of its objectives.
- 5.8** When Universal Primary Education was launched in 1997, it was created on the basis of the abolition of tuition fees for four children per family, two of whom should be girls, thus providing equal treatment for boys and girls from the beginning. Whereas most other developing countries struggle to gradually implement Universal Primary Education policies, Uganda took a great leap forward on the initiative of the President. The scheme was a great success in terms of the popular response and

notable in this achievement was that some 94% of children were beneficiaries of the Universal Primary Education grant. It is considered likely that Uganda will achieve its MDG target of Universal Primary Education by 2015 - although the goal for completing the full cycle may not be met. However, the increase in primary school enrolment from 2.4 million in 1997 to 6.8 million in 2000, a net rate of 95%, put great strain on the system to provide even the most basic of services. Also by 2000 there was a shortage of some 50,000 classrooms and only 89,000 of the needed 125,000 teachers were on the payroll. There were additional knock-on consequences, as well including a major increase in demand for a significantly under-resourced secondary school sector, as the primary students graduated and sought places.

Sector Performance and Management

- 5.9** In 1998, the Ugandan government became one of the first to launch an education sector programme and adopted an Education Sector Strategic Plan for the period 1999-2003 with the key objectives of increasing equitable access, improving quality and more effective management of resources. The programme drew upon the cooperation and contributions, human, physical and financial, of a wide range of partners and stakeholders, including the external funding agencies. This first phase of the sector programme planned to address all the various requirements and goals of the education sector systematically within a five-year framework. While emphasising basic education, in line with its commitment to the international Education For All targets, it also proposed to develop plans for secondary and tertiary education.
- 5.10** In general, the Uganda process is viewed as a model of good practice in sector-wide approaches. The sector programme had several key features, including:

- Well-documented progress and high-quality dialogue at the reviews, with full participation by Ministers, Members of Parliament, senior officials, representatives of the international partners and other key stakeholders;
- Undertakings agreed between Government of Uganda and the international partners which were then used to measure progress against key objectives;
- A comprehensive system for monitoring and evaluating progress, including the establishment of an Education Management Information System (EMIS), which resulted in greatly improved data from 2000 onwards;
- Sector level indicators, linked to the Government of Uganda priorities of increased access, quality and efficiency. In particular, several Education For All indicators were more closely monitored: pupil/teacher ratio; pupil/classroom ratio and pupil/textbook ratio;
- Achievement of undertakings is used as a trigger for release of funds by budget support donors.

5.11 The combined efforts of the national government and its development partners has resulted in the following achievements:

- An increase in enrolment of primary school age children to a total of 7.3 million;
- Significant closure of the gender gap at primary level though the policy of providing free education for two girls and two boys from every family;
- Construction of new classrooms and completion of unfinished ones leading to a reduction in the pupil: classroom ratio from 116:1 in 1998 to 92.1 in 2003;
- An improved pupil: teacher ratio from more than 100:1 in 1998 to 56:1 in 2003;
- an improved provision of learning materials to reduce the pupil/textbook ratio from 6:1 in 2000 to 3:1 in the core subject areas;
- Modest improvements in provision for children with special needs, disadvantaged children and pre-primary schools.

5.12 Two main programmes, each supported by external finance, facilitated the expansion of access to primary schooling. These were the School Facilities grants, which fund classroom construction, and Universal Primary Education grants which go to individual schools to replace the income they would have formerly received from fees before the introduction of free primary education. However, there was a degree of disillusionment on the part of parents that the promised free education had not materialised. They still had to pay for school uniforms, notebooks, pencils, and lunches. Concerns were also expressed, by local officials and the schools themselves, that the Universal Primary Education capitation grants were insufficient to meet all the necessary expenditure. While the announcement of Universal Primary Education in 1997 produced a massive increase in enrolment, by 2003 the net enrolment rate at around 88%, seemed to have reached a plateau, or even declined.

5.13 In addition to the challenges of enrolment, there were significant problems in the retention of pupils, especially girls. It is of major concern that there is a trend for older girls (particularly) to drop out or attend irregularly, due to factors such as domestic duties, pregnancy and social pressures, including a perception that there is little point in educating them. For boys, a major reason for dropout appears to be a perception that the curriculum is irrelevant to their future needs. A more flexible curriculum which stimulates opportunities to respond to the needs of rural and other circumstances, would be a worthwhile development and is currently being planned.

5.14 Throughout the life of the Education Sector programme there have been concerns about the quality of provision. By the time of the November 2003 six-month Review, there was general agreement that the balance and emphasis needed to shift to the raising of quality, especially with respect to teaching and learning processes. In addition, the expansion of pupil numbers put

pressure on the supply of trained teachers and it was realized that there needed to be a strong focus on improving the quality of teacher development, support and supervision. The scheme for the training and support of new teachers (Teacher Development and Management Strategy) has been very effective in providing additional teachers to cope with the increase in student numbers.

5.15 A dominant negative influence on quality in the upper years of the primary school is the Primary Leaving Examination, which is used as a selection tool for allocation of the relatively scarce places in secondary schools. The need for students to perform well in this exam creates unhelpful pressure on them and their teachers and reinforces poor teaching approaches.

5.16 A healthy feature of the programmatic approach adopted in Uganda is the commitment to regular review and subsequent modification of elements of education provision as required. As an example, the new Education Sector Strategy Plan will respond to criticisms of the curriculum by initiating a new curriculum reform process which will not only make it more appropriate and relevant to the needs of students and the nation in general, but will also reduce the perceived overload by removing some of the thirteen subjects now deemed unnecessary. This will be followed by a revamp of the teacher training curriculum.

5.17 At the beginning of the period under review, Ireland stated its commitment to ensuring that HIV/AIDS prevention and containment activities were incorporated into the education sector plan. Since then Uganda appears to have considerably improved the HIV/AIDS situation overall but it is still a matter for very grave concern and in need of urgent sustained attention and prioritisation. Successive reviews of the sector programme have raised the issue, but there is evidence that the resultant activity on the ground has been quite

limited. More recently, the President's Initiative on AIDS Strategy for Communication to Youth has developed materials and supports training at primary education level.

5.18 The Joint Donor Evaluation of External Support to Basic Education in Developing Countries (Uganda Vol 5, 2003 p 34) found that there was little evidence of change in the desired direction. The study also failed to observe any proactive work relating to HIV/AIDS in the schools visited and noted that the subject rarely came up in discussions with local officials, head teachers and teachers. It would appear that few funds have been allocated for these purposes.

Development Cooperation Ireland Support - Rwenzori, Uganda

Development Cooperation Ireland uses a mix of aid modalities to delivery its development cooperation programme in Uganda. The delivery of assistance through budget support, sector support and district-level programming creates a number of synergic opportunities, particularly in contributing to monitoring and lesson-learning of the effectiveness of national programmes at district and sub-district levels. In the case of Uganda, one such example has been field level support to the Primary Education Reform Programme in the Rwenzori area.

Under this programme, the Ministry of Education and Sports identified the six regional areas in need of greatest support in order to meet the demands of Universal Primary Education. Ireland was asked specifically to support the area of Rwenzori (which comprises five districts) where, although school enrolment had risen from 55% to 93%, subsequent challenges included an untrained teacher rate of 32%, an urgent need for additional teachers and the establishment of pre-service and in-service training programmes combined with a construction programme to

meet the demands. In conjunction with the Ministry and Rwenzori local government administration, Development Cooperation Ireland agreed a programme in 1997, whose overall goal was to support the Poverty Eradication Plan through such specific objectives as:

- The establishment of an outreach department and the rehabilitation of a Core Primary Teachers College along with 29 Coordinating Centres managed by trained Tutors supporting some 541 primary schools
- The provision of training in relevant management, supervision and monitoring skills for District Education Officers
- Relevant plant and equipment.

While a 2002 Review of the support recognised significant progress in a number of aspects, it also noted several continuing challenges, not least of which included:

- The need to break out of the 'vicious cycle' of examination-bound, ineffective teaching and inappropriate learning;
- Establishing effective control and administrative structures to modernize teacher education;
- Handling the transition from a project format to a sector-wide/programmatic approach;
- The implications of the Primary Leaving Certificate, its curriculum and the extent to which it could be implemented;
- The absence of women in School Management Committees;
- With regard to HIV/AIDS, a necessity to continue with advocacy work and follow up implementation at both central and district levels.

The Review found that, despite the level of inputs, there has been little improvement in the quality of education. In particular, a feature reported was the failure of the curriculum component to identify qualitative outcomes. It was recommended that Development Cooperation Ireland should consider redirecting resources away from

the provision of instructional materials and towards the support of broader changes at the sector level. The report also recommended that "...to inform this support at national level and feed into policy, Development Cooperation Ireland could fund pilot projects in Rwenzori. These projects can build upon the strong and positive partnerships Ireland has already developed with the districts and schools and their developed knowledge and understanding of the local contexts."

The Review identified the issue of attribution-"while most of the developments occurred in the wake of Development Cooperation Ireland's intervention,... they are not attributable in any strict sense to that intervention. To gauge [its] impact with any confidence one would have to attempt to respond accurately to the question: to what extent would the developments described have occurred had the [Irish] programme not have been operating in the area?" The review concluded that in fact there was ample evidence to suggest that the Irish contribution to their achievement was positive.

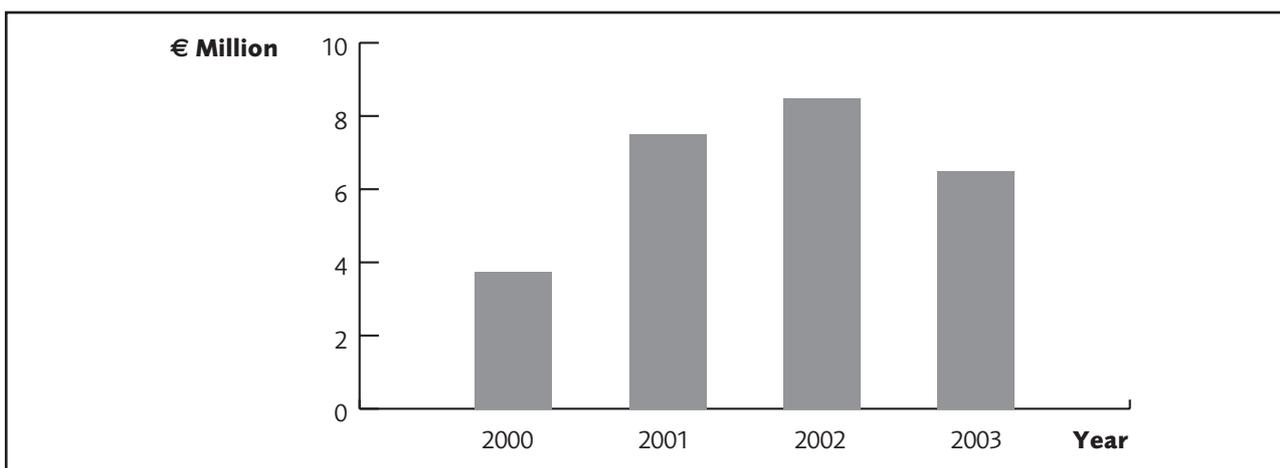
Development Cooperation Ireland's involvement at this level has fed into national level work in the following manner: (i) support has been provided through participation in education sector reviews, which are held in April and October of each year (ii) Ireland also participates in other planning and monitoring fora, namely the Finance, Planning and Management Working Group as well as the Monitoring & Evaluation Working Group. It is also a member of the Education Sector Consultative Committee (ESCC) whose meetings are chaired by the Permanent Secretary of the Ministry of Education & Sports, and held bi-monthly to review progress and make suggestions for future actions. Through these fora, Development Cooperation Ireland is able to (a) address front line needs and (b) use this knowledge/experience to inform and influence policy and reform at the national level. Ireland's involvement in the national Budget Support Working Group is the final 'up-stream' forum in which it is able to contribute and inform lesson learning and policy/strategy development.

Overall Financial Contribution

5.19 During the review period, 2000-2003, Ireland's contribution to the Education Sector Support Programme amounted to a total of €26,226,000, some one-third more than that which was projected. Annual support to the education sector increased over the period of the CSP, both through budget support and through project support, rising from the originally agreed amount of €4,776,000 to

€9,155,000 in 2003. This substantial increase reflected the confidence which Ireland had in the Government of Uganda's commitment to the education sector and the soundness of its governance and structures. In particular, it was satisfied that the mechanisms for budgeting, financial disbursement and accountability, together with the structures for steering and managing the Education Sector Investment Programme, were sufficiently robust to merit the risk that was taken in providing such a dramatic increase in financial support.

Year	2000	2001	2002	2003	Total
Expenditure	3,746,000	7,500,000	8,480,000	6,500,000	26,226,000



Uganda-Total Development Cooperation Ireland Expenditure on Education Sector 1999-2003 (€ Millions)

5.20 While delivering the majority of its support to the education sector through the central government Education Sector Programme, Ireland's support continued to remain active at the District level. Irish support to the Districts was jointly programmed with the Ministry of Education and the Districts. Annual work plans were agreed within the context of budget ceilings, indicating numbers of classrooms to be built, teachers trained, textbooks purchased, etc. Implementation was the responsibility of the senior District officials, while Development Cooperation Ireland employed a Technical Adviser to monitor the implementation of the construction component and ensure the maintenance of quality standards.

5.21 In the context of the Uganda programme there were a number of benefits from supporting the District-level programmes. Within the sector approach, Development Cooperation Ireland had a comparative advantage, in that it could engage more authoritatively in the national dialogue as a result of its close contacts and experience at local level. This attracted an enhanced level of credibility to the Irish programme at the national level. For example, in preparation for joint review meetings, Development Cooperation Ireland facilitated discussion among District Heads and non-governmental organisations, and also supported districts financially to enable their representatives to attend sector review meetings. This led in turn to

greater levels of confidence and opened up a more critical debate in the meetings. Furthermore, the nature of pre-review visits to the field improved so that they focused more on the local agenda rather than on the national one. Field visits sponsored and assisted by Development Cooperation Ireland for senior Ugandan government officials performed a very useful function in enabling key officials to get exposure to the real situation which they otherwise would not get. Finally, these contacts provided a reality check for the Embassy staff through ensuring that they were fully informed about the situation in Districts.

5.22 In a manner similar to that used in work with the Districts, the Irish programme has nurtured and facilitated local and national non-governmental organisations. The sector-wide approach created problems for these organisations initially. Not only did they tend to lose the direct support of international donors which they had enjoyed formerly, but they also found it difficult to engage in the sector programme process at the national level. Development Cooperation Ireland advocated very actively with central government and other donors for the inclusion of non-governmental organisations in the regular Sector Reviews. It also provided ideas on how the system could function, especially in terms of finding a way for the multiplicity of organisations to relate to the process. Ultimately, Development Cooperation Ireland was instrumental in proposing the formation of the Forum for Education involving non-governmental organisations in Uganda and in providing encouragement and some financial support to the new structure. The establishment of this structure has done much to enable the voice of these organisations to be heard in the education debate at national level.

5.23 Development Cooperation Ireland has advocated strongly, with some success within the Ministry, for a more vigorous effort against HIV/AIDS and funds a post in support of this. At first this person's

effectiveness as a focal point was limited through lack of support at senior level, but now the work has moved in a more strategic direction as a result of a direct link to the Permanent Secretary. There is also good work being done through the Straight Talk Foundation, which produces a supplement once a week in a national newspaper, and has developed and introduced a system which is active in 60% of all schools using peer group methods to raise the relevant issues. However, there is a lack of strong leadership at the top of the Ministry - accompanied by a lack of coordination among all the various efforts being made. In addition, the need for mainstreaming is as yet neither well understood, nor applied. Development Cooperation Ireland has provided much support to local non-governmental organisations for work related to HIV/AIDS. This has included activity directed at behaviour change in schools.

5.24 Development Cooperation Ireland recognises that gender equality in education requires resources and strategic planning for long term action. It has therefore worked with the Government of Uganda to ensure that the National Strategy for Girls' Education was implemented and that gender issues were addressed in the education sector programme.

5.25 At the end of 2003, Ireland was invited to take over the position of coordinating donor of the Education Funding Agencies Group, thus giving it an even more central role. The coordinating donor acts as the focal point for donors' and responsibility includes liaising with the Ministry, preparing for Reviews, including preparation of the required documentation, preparing for and following up the monthly donors' meeting and the bi-monthly formal meeting with the Ministry. This is an important function and places Ireland in a position to exercise even more influence on the process.

Donors

5.26 The provision of budget support by Ireland has meant that it has continued to be a key participant in the core activities of the sector programme. While the Education Funding Agencies group includes all donors, Ireland is one of a number of donors which was part of an initial "like minded" group who shared the rationale of funding through the government budget. As a result of needing to develop shared agreements with government, these donors have committed themselves to a level of intense dialogue with each other and with the government which is not shared by other donors to the same extent. While this has created an inner group and an outer group of funding partners, there has been a benefit to the latter, in that many of the more difficult issues of providing finance in a programmatic rather than in project mode, have been resolved for them. One result of this is that as the programme has progressed, more donors have gained the confidence to switch to budget support and have joined the inner group. By 2002, almost all the funding agencies were operating within the framework of the sector programme, with many contributing their funds through budget support mechanisms. This represented an enormous shift in the approach of donors from the pattern at the beginning of the 1990s. At that time agencies were funding separate projects, driven largely by their own priorities and interests, with minimal coordination and with rather weak links to Uganda's own education strategies.

5.27 One positive response to this pressure on limited human resources is an agreement to hold just one review event per year from 2004 onwards, rather than the two which were conducted annually up until the end of 2003. This is a direct result of concerns about the administrative burden on civil servants, but from a more positive perspective derives from the growing confidence which donors have in the system.

Commentary

5.28 It has been accepted by both the Ugandan authorities and the donors that there has been an over-emphasis on the primary school phase of education, to the detriment of other stages and sub-sectors. Those which have been neglected include the secondary phase, early childhood development and adult literacy. The most recent plans for the sector foresee a shift of emphasis to include the secondary stage in the next phase. This is essential, not least as there is a need to take account of the bulge at the top end of primary schools as Universal Primary Education works its way through.

5.29 The Uganda Education Sector Programme has received very favourable comments within the country and internationally. It has provided a point of reference for approaches in other African countries and beyond. It is seen as a model process in the sense that it exhibits all the expected features of a sector-wide approach, especially the strong commitment of the government, external financiers and other key stakeholders to the central elements of the process. This is not to imply that there are no difficulties, but rather that the mechanisms in place are well utilised to address problem issues as they arise and to seek solutions. However, the process is very demanding and results in a heavy workload for officials of the Ministry and for representatives of the donors, especially those such as Development Cooperation Ireland who provide, with good rationale, funding directly and indirectly through the various modalities used in Uganda.

5.30 There is now recognition that the mechanisms of sector development, planning and implementation, need to be viewed as a long-term programme. Accordingly, it has been decided that the Education Sector Strategic Plan will operate over the period 2004-2015. This decision will require international partners to seriously consider making longer-term commitments of support than the more traditional ones, which tended to be of the order of three years. Between 1998 and 2000, external assistance met between 54% and 61% of the recurrent costs of

basic education. Uganda's projections show that while the government proportion of total expenditure is increasing, the dependence on external funds is not likely to be much reduced for a significant number of years. There is some concern about the long term effect of the donors providing such strong support to the expansion of basic education. There are concerns that the government is now over-committed, and that this level of provision may not be sustainable in the longer term. There is certainly an implied commitment to long-term support from external sources for a considerably long time to come.

5.31 One issue for some donors is that they have increased financial resources to disburse, but without a corresponding increase in their own staffing to administer and supervise the expenditure nor to engage in the time-consuming processes of sector programme organisation. Some international donors have joined forces to reduce their own physical engagement by agreeing to be represented by one of their number, thus lowering their transaction costs. This has obvious advantages, but it requires that the agencies are very clear about their own objectives and they ensure these are well understood by the agency chosen to represent them. There are dangers in this, as it is likely to reduce the institutional memory of those agencies which delegate their involvement, and it also carries the risk that if there is an interruption in representation, perhaps through illness, it carries more risk of dislocation than where each agency represents itself.

5.32 The acceptance of the lead donor role is only feasible for those agencies which have sufficient staffing in the capital, and is therefore shared among the four or five which have full time education staff available in the country. This responsibility will increase the level of engagement for some Irish staff, putting increased pressure on the Embassy. Clearly the coordinating donor role requires an additional effort and input over a finite period of time, but there is also a judgment of what

constitutes an appropriate level of day-to-day engagement in the general process.

5.33 Development Cooperation Ireland also supports the work of a number of international (Irish) non-governmental organisations in Uganda. At present the work of such organisations tends to be discrete and local, with little relationship to the overall sectoral programme. However, there would appear to be some scope for Ireland to make use of its experience, where appropriate, as a way of informing the strategic discussions held at national level, and also to support innovative pilot activities aimed at finding ways to improve education provision.

5.34 Regular six-monthly reports by Development Cooperation Ireland's Education Adviser in Uganda provide a clear indication of the several facets of support and activity in which Ireland is engaged. These internal reports at present tend to ignore process elements of Ireland's contribution and of its interaction with government and other partners. With respect to a record of inputs, activities, outputs, monitoring and evaluation etc, of the programme, Irish reporting could make use of the regular sector reports, if necessary contributing to improvements in their quality. This would support the achievement of one of the goals of the sector-wide approach - common reporting. In its own reports, Development Cooperation Ireland could then concentrate on identifying its distinctive contribution, not only in terms of financial and other inputs, but particularly to the process dimension of the sector-wide approach. This would engender a more reflective stance in interacting with government and other development partners. At present, there is little or no evidence in the reports, that the role Development Cooperation Ireland personnel play is sufficiently reflective, thus implying that staff may be overlooking the need to constantly acquire, develop, hone and use the higher order skills necessary to function effectively in such an environment.

6. ZAMBIA

Context

6.1 Development Cooperation Ireland's involvement in the education sector in Zambia dates from 1993 when it provided support to a primary education project as part of an integrated programme of assistance to Northern Province. By 1999, involvement had expanded considerably and become part of the Basic Education Support Investment Programme, managed and implemented by the Ministry of Education. Ireland was an enthusiastic participant and was one of the first donors to agree to channel funds through the government system towards this new initiative. Through the history of Development Cooperation Ireland's support to Zambia, education has been a high priority. Thus, with the inception of the aforementioned initiative, annual funding has increased from €1.8 million in 2000 to €5.7 million in 2003 - a total of over €19 million for the four-year period.

6.2 Although Irish support has typically included school construction, teacher training, materials etc, a particularly significant contribution, in cooperation with Department for International Development (UK), was Ireland's instrumental role in supporting the introduction of a literacy programme. This achieved dramatic success in raising standards of reading at first in Northern Province and then throughout the country. Development Cooperation Ireland has also provided technical assistance in support of local capacity-building under the Accelerated Programme for Decentralisation. These activities and interventions are detailed further in the sections that follow and in the Boxes. This review covers the period 2000 to 2003 and therefore largely draws on the results of the Basic Education Sector Investment Programme and the current sector programme of the Ministry of Education Strategic Plan 2004-2007.

Description of Zambia

6.3 Of 79 countries in the world for which figures were available, Zambia was the only country in which the Human Development Index worsened between 1975 and 1997 seventy per cent were living below the poverty line - 40% were regarded as "core poor". There were many reasons for this, including the fact that Zambia was among the poorest countries in the world after a collapse in world copper prices, together with weak political leadership which at times resulted in poor economic growth.

6.4 Zambia has been struck by a catastrophic HIV/AIDS epidemic and this is probably its single most important challenge – currently 20% of the 15-49 age group is infected. (UNAIDS website 21.5% in 2002). It is likely that in excess of 20% of professional workers including teachers, have HIV/AIDS. Overall, life expectancy has been reduced from 54 in the mid 80's to 37 in the late 90's and is now reckoned to be as low as 33.

State of Education Sector

6.5 Although the government invested heavily in education and the system grew substantially in the immediate post-independence period, by the mid-70's there were growing problems caused by the country's economic difficulties. By 1985 the education system was described as being in a state of crisis, with falling enrolment rates, inadequate school infrastructure and educational resources, both in terms of amount and quality, and a demoralised teaching force. As a result, public confidence in the system was also in steep decline.

6.6 In 1996, Zambia adopted a national policy for education (*Educating our Future- National Policy on Education*). The policy gave priority to basic education, defined as the first nine years of school.

Other features included the growth of Community Schools, and cost-sharing mechanisms. However, a very large proportion of poor parents were not in a position to contribute much to their children's education.

6.7 By 2000, education quality was at such a low level that a national survey of pupils in grade five found very low levels of achievement in English and Mathematics. Other studies showed similar results in 4th and 6th grades, leading to the overall conclusion that standards were very low throughout the country. At the same time there was evidence of high repetition and dropout rates, resulting in low completion rates. Related to these outcomes was the continued loss of confidence of parents in the school system's ability to provide their children with a worthwhile education. Government had limited capacity to provide funds for school infrastructure and maintenance with the result that most investment was coming from the donor community. Planning was poor, management capacity was weak, and the Ministry of Education was understaffed.

6.8 Also by 2000, Zambia had one of the largest numbers of AIDS orphans anywhere in the world and it is estimated that the number will reach one million in the coming years. Indeed, teachers can be working with classes of children of whom as many as 23% have lost one or both parents. Teachers are no less affected, as they themselves may either be struggling with the syndrome or be trying to support affected members in their families.

Establishment of the Basic Education Sector Investment Programme (BESSIP 1999-2002)

6.9 By the mid to late 1990's, the Zambian government had accepted that sector-wide approaches offered the best hope of improvement and development in the health, education, agriculture and road sectors. In 1996 there was agreement between the Zambia authorities, the World Bank and key donors (including Ireland) that it would be appropriate to focus on primary education and to adopt ways of working that were sector-wide and which would be managed within the government's own systems. It then took three years to complete the planning and preparation phase and launch the Basic Education Sub Sector Investment Programme (BESSIP). At the same time a Poverty Reduction Strategy was being prepared and it prioritised education.

6.10 Although the national policy defined basic education as incorporating the first nine years of school, for the purposes of this new sector programme, this was restricted to the first seven years. In reality this programme was better classified as a sub-sector programme, in that the initiative omitted significant parts of the education system, including secondary, tertiary and vocational education. This was partly due to a recognition of the difficulty of coordinating the efforts of four separate ministries with responsibility for various elements of the system. Other reasons included the different constraints the donors had in adopting new financial and management structures and reservations about Zambia's capacity to manage a large-scale integrated programme over five years.

6.11 The role of non-governmental organisations/civil society organisations was also recognised by both their actual and potential contribution to the education sector. In order to play a fuller role in the

process, Zambian non-governmental organisations organised themselves into an umbrella organisation, the Zambia National Education Coalition (ZANEC).

6.12 The programme had two main objectives, firstly increasing enrolment and secondly, improving learning outcomes. The programme aimed to raise the net enrolment to 90% by 2005 and to significantly raise quality, with the major objectives being: provision of adequate school buildings/classroom for all children within a five km radius of their homes; an increase in the number of and quality of teachers, through pre-and in-service training, in addition to improving their conditions of service; a pupil/textbook ratio of 1:2 in core subjects; a revised curriculum; promoting healthy and well nourished children through a school health and nutrition programme; improving opportunities for vulnerable children through a bursary scheme; the introduction of a programme for girls' education; provision of support to community schools. HIV/AIDS had been treated as a cross cutting issue, but under BESSIP it was to become an additional component in the programme. In addition, a national programme of assessment was to be developed to enable the system to measure changes in learning outcomes over a five-year period.

6.13 In order to release funds in a regular and periodic manner, targets were agreed between government and donors for performance within BESSIP. For example in 2000, these included: increasing the proportions of teachers in rural schools; at least 20% of the Zambian government budget to be devoted to education; national assessment of learning to be carried out; District Education Boards to be established and functioning in 60% of Districts. These targets are seen as a management tool, as a spur to maintaining the momentum of the programme, rather than conditions which must be met. If they are not met then that fact becomes the subject for analysis by the partners in order to seek solutions and improvements.

Sector Management and Performance

Management

6.14 Full involvement in sector programmes has both inherent advantages and disadvantages for Development Cooperation Ireland. These include an acceptance of the reality that while Ireland would be able to influence to some extent all aspects of the programme, control of the programme would largely pass into the hands of the Zambian government and be shared with other donors and other stakeholders. The implication of this was that Development Cooperation Ireland would have no discrete programme of its own, other than the Northern Province support, but that it would contribute to the much larger objective of a sub-sector-wide programme, with potentially much greater developmental impact throughout the country. As a partner in the BESSIP, Ireland sat on the Joint Steering Committee. It is also represented on the Programme Coordinating Committee, which is responsible for overall management of the BESSIP programme. In addition Ireland is a member of the Informal Donor meeting, in which donors share matters of mutual interest, and also is involved in the Sector Plan Support group. In the past it has been a member of the Financial Technical Committee, but is not so currently, as membership is rotated among the various external partners. This is indicative of the shared responsibility which the donors are taking for key elements of the process.

The key elements of performance

6.15 Access:

i) A shortage of classrooms and of accessible schools in rural areas were considered to be the most important barrier to access. BESSIP brought a more coordinated approach to provision, based on planning and an intention to provide facilities on a more

equitable basis, rather than the previous ad hoc and piecemeal approach. ii) In preparation for the Ministries' Education Sector Strategic Plan 2003-2007, the government abolished the system of various types of fees that schools charged for recurrent costs and introduced grants for individual schools instead, to make up the deficit in funding. The so-called BESSIP Grants were intended to increase enrolments and improve retention of poorly off students, by paying for learning materials and stationery. However, it is outside the scope of this review to predict whether the removal of fees will have the desired affect.

6.16 Quality

i) Although the government and its international partners identified quality improvement as an equal component of BESSIP alongside access, there was a serious risk that increased access would see little or no improvement in quality. The sheer practical and financial demand of expanding the system had put such strain that quality was ultimately compromised.

ii) Since 1999, assessments of student achievement have been carried out which suggest that achievement remains low with little change (this is not unexpected in that even if there were significant improvements in quality it would take several years for these to materialise in the form of improved scores in internationally standardised tests).

iii) Overcrowding of classrooms and double-shift arrangements undermined quality i.e. where more than one full class session is held per day. In the BESSIP Mid Term Review, 93% of the schools surveyed had either double or triple shifts. This put pressure on the school infrastructure and physical resources, such as teaching and learning materials and teachers, who have had to teach more than one shift of pupils each day.

6.17 Lack of capacity at District level has been a serious problem, identified in 2001 and 2002 BESSIP reviews. Quality is typically at risk if there are blockages in the system e.g. in supplies of texts or other materials. As a result of decentralised

functions under BESSIP, time was needed to bed down new responsibilities, systems and arrangements at the District level.

6.18 Impacting on both access and quality are the very significant problems of teacher attrition, both through HIV/AIDS and as a result of teacher dissatisfaction. This is a complex problem. For example, teachers would appear to be one of the major resources for the fight against HIV/AIDS, but not only are they at risk themselves, there is also distrust, based on a widespread view that members of their profession take advantage of the situations they are in and are responsible for a considerable level of sexual abuse of their pupils.

6.19 Teacher Education

i) BESSIP targeted Teacher Education as a way of raising quality and of providing the number of teachers needed. There have been attempts to bring together the pre-service with the in-service providers of training, but this was not very successful, due to rivalries based on older traditional projects which kept these segments of teacher development responsibility separate.

ii) For in-service training, BESSIP was able to build on a successful scheme established as early as 1993 (AIEMS-Action to Improve English, Mathematics and Science). Although this was set up as a scheme to improve the teaching of English, Mathematics and Science, it has actually focused more on general teaching skills.

iii) Pre-service training was well established.

6.20 Curriculum and materials

i) The design of a new curriculum proceeded slowly. However, it was based on widespread participation and consultation and focused on core skills of numeracy and literacy.

ii) Provision of textbooks proved problematic initially. However, supply has improved during the life of BESSIP.

6.21 The BESSIP Mid Term Review in 2002 sampled widely across the country and overall identified modest gains in quality as gauged by improved provision of school infrastructure, desks, textbooks and learning materials. The review also led to important modifications for the ongoing programme.

6.22 A major finding of the review was that Zambia had simply managed to do not much more than arrest the decline of the education system and provision. Over the first four years, the major emphasis was getting the sector-wide approach established and working, and structures and systems into place, while at the same time providing financial support to keep the education system functioning at a basic level.

6.23 There was also the growing realisation that the focus of BESSIP on one major element of basic education, namely the provision of primary schooling, has led to neglect, not only of other sub-sectors such as secondary education, but also important components of basic education, especially early childhood education and adult literacy, both of which are themselves Education For All goals. Finally, it was also recognised that Head Teachers received some training but this tended to be piecemeal and not designed to provide them with generic skills and competences necessary to manage the full range of responsibilities, issues and challenges.

6.24 However, other than the benefits of some significant lesson learning there were also other gains. There was a dramatic growth in Community Schools in the five years to 2003. Community Schools serve out-of-school children by providing more flexible, relevant and more or less free schooling. For some parents this is seen as a better provision and more responsive to real needs than the formal government system. However, there is a danger of a parallel, less well funded, inferior system. The importance of the Community School system has now been recognised and a closer relationship between it and the state sector is being

fostered, notably through the establishment of the Zambia Community Schools' Secretariat with donor financial assistance.

6.25 In 2003, the Ministry formulated the Education Sector Strategic Plan 2003-2007. This has taken on a number of the experiences of the BESSIP but has also significantly moved the sector forward to a full sector-wide approach, deepening the commitment of stakeholders to the development of the Zambia education system and, essentially, the classroom. The national government, politicians and officials, have shown increased ownership evidenced in the manner in which government leads the debate in the various committees, working group and review meetings which take place between government and agencies. This is a healthy development, not least as it provides valued national leadership of the process and reduces the possibility of individual initiatives and rivalries amongst donors.

Development Cooperation Ireland Support - Northern Province

In Northern Province

Development Cooperation Ireland has supported the Education Sector in the Northern Province of Zambia since 1993. The support has changed over the past ten years in line with national priorities and now almost all the education activities in the province are supported through the national level programme.

Looking back over a ten year period it is possible to identify a number of strategic interventions that were supported by Development Cooperation Ireland in the Northern Province. The School Building Programme (initially implemented directly but now integrated into the Ministry of Education) has helped ensure an

improvement in school infrastructure in the province. The Irish programme also facilitated the pilot phase of the Breakthrough to Literacy programme which has since been developed into a successful national programme which has had a major impact on improving literacy skills.

The programme in Northern Province has helped put systems in place to allow the Ministry of Education in Northern Province to prepare for the national programme and to benefit from the funding coming from this source. Specific assistance has also been given to the Ministry to move ahead with its decentralisation programme which encourages the planning of educational activities and the management of funds at district level. Through the Irish support, Northern Province should now be in a position to actively implement the National Education programme.

At the national level

Development Cooperation Ireland has played a strong advocacy role in promoting the Sector-Wide Approach within the donor community and was one of the first to contribute to the pooled fund. The Ministry sees this early support as particularly strategic and it has led to a situation where now most of the funding for the sector goes through joint mechanisms in support of a national programme.

Within the Sector-Wide Approach, Development Cooperation Ireland has given specific support to ensure that HIV/AIDS issues are addressed and it has also ensured attention to gender issues, in particular the need to support girls in the education system.

The engagement with the Ministry has meant that Development Cooperation Ireland has been actively involved in policy development and has worked with the Ministry and other donors to strengthen monitoring within the education system.

In addition to supporting Government programmes, Development Cooperation Ireland has given complementary funding to a number of non-governmental partners including support to civil society advocacy groups.

6.26 As noted earlier, prior to 2000 support to the education sector was largely in the context of provincial level support. However, it was also significantly involved in two other important initiatives – the establishment of the Basic Education Sector Support Investment Programme and Breakthrough to Literacy.

6.27 In 1998, consultations between the Zambian authorities, donors and other stakeholders began which culminated in the establishment and launch of The Basic Education Sub Sector Investment Programme (BESSIP) in 1999. Development Cooperation Ireland was an enthusiastic participant in the early stages and has supported and funded BESSIP since then, together with Britain, Netherlands and Norway. Ireland was one of the first donors to agree to channel funds through the government system.

6.28 At the same time, Ireland took the decision to integrate the Northern Province project into BESSIP on the basis that all provinces would be supported through the sub-sector programme. However, it was felt that, at least in the early stages, it was sensible to maintain a presence and involvement at local level in Northern Province. This would provide an opportunity to gain experience and knowledge of the programme's development and impact by observing its performance at the Provincial level, but at the same time reducing direct financial assistance to the Province. It was therefore decided that the bulk of Ireland's assistance would be provided through the pooled funding mechanism, while, as a transitional arrangement and to ensure steady flows as systems embedded, some funds would go directly to the Northern Province education project for two further years (but be fully reported on to the Ministry).

6.29 However, in common with other agencies, Ireland identified circumstances in which it was considered appropriate to allocate funds outside the pool for specific activities. For example, its support to the Northern Province within the area based programme not only provided the test bed for the Breakthrough to Literacy programme but provided feedback on the functioning of the system on the ground.

support for this was provided by the UK Department for International Development, which had been involved from the beginning. The intention was to fully implement the programme country-wide in 2003 but because it would not receive funding directly from BESSIP until 2003, Ireland agreed to continue to fund it in Northern Province until that date.

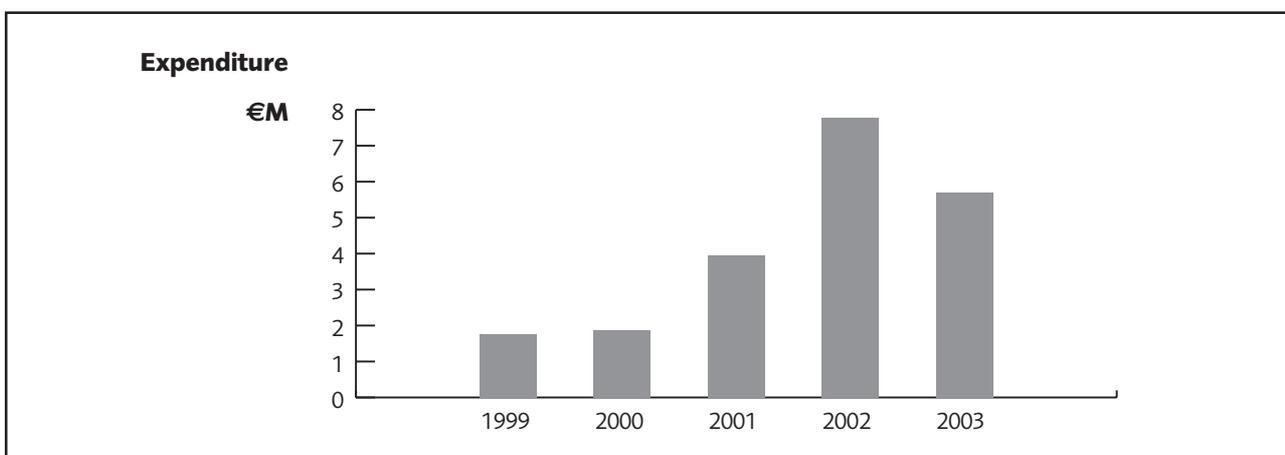
6.30 Breakthrough to Literacy [see box] was started in order to address extremely low levels of literacy among primary school pupils. It focused on developing initial literacy in the local language in grade 1, followed by a "breakthrough" year in which children were introduced to English, to be followed in turn in Grade 3 by a switch to English as the medium of instruction. The programme was first piloted in Northern Province with the assistance of Irish funding and, having been judged successful by an external evaluation, was introduced into three other Provinces. A major proportion of financial

6.31 The programme in Northern Province also had an advantage when it came to providing technical assistance in support of local capacity-building under the Accelerated Programme for Decentralisation. As it was reported, an Embassy member of staff indicated that "Our first thinking was that we would just work our way out of Northern Province, but we know now that these districts need capacity-building and we do have important in-the-field advantages there to help with that" (quoted in Z JDR Rev p 14).

Overall Financial Support to the Education Sector

6.32 The total Development Cooperation Ireland financial contribution to education in Zambia for the years 2000-2003 was €19,293,521.

	1999	2000	2001	2002	2003
Zambia	1,753097	1,867919	3,951266	7,774336	5,700000



Zambia-Total Development Cooperation Ireland Expenditure on Education Sector 1999-2003 (€ Millions)

6.33 The decision to strongly support the BESSIP was a crucially important one for Development Cooperation Ireland, in that it constituted a commitment to bring to an end project assistance under its direct or indirect control. Commitment to BESSIP had the effect that Development Cooperation Ireland became part of a collegial and cooperative mechanism which collectively set development priorities for the sector over the medium term, making decisions, planning, funding, overseeing implementation and carrying out joint review activities.

Other Donors and Cooperation/Harmonisation

6.34 At the outset of BESSIP, there were only four donors prepared to provide funds through a common pool. Development Cooperation Ireland was one of the four original core donors which committed to pooled funding after a financial systems review in preparation for this. By 2003, growing confidence among donors had resulted in a number of others joining in the pooling arrangement, with twelve donors in all supporting the programme as a whole. This was a perfectly reasonable arrangement which resulted in the donors jointly agreeing procedure with government and securing arrangement for the flow of finance and the delivery of the programme.

6.35 At the same time, the sector-wide approach created some tensions and difficulties for the various partners in working with the national government and with each other. For example, while the World Bank was a strong advocate for the sector approach and for the system to be located within the government organisation as fully as possible, its own contribution was restricted by the need to follow its own internal procedures, particularly as regards procurement, disbursement and accounting.

6.36 The close relationships among the original group of pooled fund donors (including Ireland) created some tensions with other donors who felt on the periphery of such intense activity. However, the Joint Sector Reviews overall found evidence of improved partnership, mutual understanding and increasing willingness to harmonise operational procedures. Ultimately the core circle of donors was widened in 2002 to become six and there is still some pressure to widen it further as more donors seek to join the pooled funding arrangement. This points to the need for further evolution of the ways in which government and donors are represented to each other. Whatever the negative aspects of donor engagement at the different levels, there was sufficient shared commitment to the process and confidence in it for the donors to sign a Letter of Agreement in 2003 - 'The Framework for Harmonization in Practice'. Ambitiously, this was a legally binding agreement covering the procedures for all aspects of their future working relationship with the government.

HIV/AIDS

6.37 As noted earlier the high level of incidence of HIV/AIDS affects the entire dynamic of the education system at every level, from the highest level of the Ministry through to school classrooms. It is arguably the single most important factor impinging on the education system in Zambia. It is also the case that the education system has potentially the capacity to make a major contribution to the fight against HIV/AIDS. However, the Zambian education system's response to HIV/AIDS has been largely ineffectual in the period reviewed although more recently, there appear to be signs of greater commitment to address the issues. There has been a lack of the whole-hearted commitment by political and other significant leaders seen in other countries, notably in Uganda, to the need for action. In this, both the government and its international partners have been at fault. The first phase of BESSIP had an HIV/AIDS component, but

it was only introduced some eighteen months after the programme's launch and appears neither to have been sufficiently prioritised nor resourced at a level which would have both signalled a serious intent. The curriculum for ZATEC (Zambia Teacher Education Course) designed in 1998, did not even mention HIV/AIDS as a topic for study by the student teachers nor as an issue they would be expected to raise with their pupils.

6.38 The new Education Sector Plan has raised the level of priority and funding for HIV/AIDS work. However, this does need to be accorded a very high priority indeed and to be followed through energetically to have any chance of making a meaningful contribution to the reduction of HIV/AIDS.

Commentary

6.39 A key finding of the BESSIP Review was that Zambia faces an enormous and long-term challenge, but new ways of working are slowly turning round a system that was in crisis just a few years ago. Zambia is reliant on support from outside and needs confidence that this will be a medium to long term support relationship, longer than the five-year cycle of typical agency planning.⁵

6.40 Development Cooperation Ireland has been identified as "one of the strongest proponents of sector-wide approaches".⁶ It would be very helpful if it were able to commit to a longer term support relationship with the Zambia education system of up to ten years. This would send a strong signal to the Zambian government and to development partners, that Development Cooperation Ireland had sufficient confidence and commitment to remain engaged.

6.41 Scaling up of the Breakthrough to Literacy programme in 2002 provided an important example of how a traditionally funded and managed project could demonstrate its effectiveness and become integrated into the mainstream of the sector. This programme also showed the value of external partners (Development Cooperation Ireland and DFID) working to complement each other's contributions to the overall benefit of the system. It is an essential lesson for the future of the sector programme, as it will be necessary to create other opportunities for piloting and innovation within the programme design.

6.42 At this stage of evolution of the sector programme, it is also to be expected that tensions arise between different parts of the system as regards the best ways of getting the job done.

6.43 Various problems such as those encountered with textbook supply, grants and fees' structures, difficulties in supply and deployment of teachers, are all to be expected in a system which is struggling on many fronts to address serious system-wide deficiencies within the disastrous HIV/AIDS context. The important issue is the extent to which the overall framework of BESSIP is responding to all of these types of challenges in a coherent and well-coordinated manner. It will take very many years of sustained effort and commitment to develop an education system which has the capacity to deliver the education that the country wants and needs.

6.44 There is also a danger of innovation fatigue. For many of the key participants in central and local government, and within the school system, the programme has increased the workload considerably. Also, the effect of all the procedures associated with a sector-wide programme, with its heavy emphasis on preparation for and conduct of frequent reviews, have tended to deflect key staff, especially within the ministry, from core responsibilities for day-to-day planning and management.

5 Z JDR rev pxvii.

6 JDRp 13.

6.45 With regard to Development Cooperation Ireland's own internal reporting by the Education Advisor of its engagement in Zambia, as noted above in the Ugandan context, there is considerable evidence of over-reporting, in that much attention is given to recording the activities taking place within the BESSIP framework and plan. Given that there are clear and improving arrangements for regular reports to be generated within BESSIP for the use of all stakeholders, it is probably superfluous for Development Cooperation Ireland to create parallel accounts of inputs, activities and performance. It could be argued that such reporting lies outside the spirit of the sector-wide approach, which emphasises, inter alia, a common, shared monitoring, evaluating and reporting process which both reduces transaction costs for all partners and focuses attention on the fact that it is a single joint programme.

6.46 At the same time, there is also evidence from the same reports that valuable insights into Development Cooperation Ireland's own approach to its partnership function are being gained and recorded. One such report (Sept 2003) records the discussion which took place between government and key donors supporting the Accelerated Decentralisation Process (ADP), which turned out to be "very open and eventually fruitful". Such a reflective perspective, which concentrates attention on what Ireland's role actually is in the process, appears to have more potential for lesson learning within the organisation. Not only does it create scope for recording specific, unique interventions and contributions made in the process by Ireland, but it could lead to a deeper understanding of what are the most beneficial characteristics and competencies for the professional staff of a development partner wanting to optimize its contribution to the process dimensions of the sector programme approach.

6.47 While the benefits of Development Cooperation Ireland support to specific activities outside of the

pooled funding arrangements are seen to have value, there are inherent dangers, notably that this mixed-mode approach will produce confusion in the minds of government and other stakeholders. One significant comment in the September 2003 report, in the context of a unit within the ministry responsible for the ADP, drew attention to the fact that this unit's performance was hampered by perpetuation of the notion that "the process was in fact a project under the management of Development Cooperation Ireland, Embassy of Holland and Department for International Development". In the same report there is reference to positive responses by Ireland to a number of requests for support which lay outside BESSIP. Undoubtedly such a response was quite appropriate within the overall Irish policy; nevertheless it runs the danger of compromising and weakening understanding of, and commitment to, the principle of the sector-wide approach. It is important to move toward a situation where only rarely will it be necessary to support initiatives which lie outside the government's planned and budgeted programme.

7. CONCLUSIONS

Development Cooperation Ireland in Uganda and Zambia

7.1 The development of the education sector has been seen as too narrowly focused on primary education. This is at least in part the result of the global drive towards meeting the Education For All goals. Development Cooperation Ireland has advocated for the widening of programmes, not only to include other aspects of basic education, such as adult literacy and early childhood education, but also other key sub-sectors such as post-basic and tertiary education. A sector-wide approach should be one in which the entire sector is planned for and programmed, in such a way that there is coherence and balance between sub-sectors and dimensions. It is noted that the second generation of sector programmes in Uganda and Zambia, while continuing to prioritise basic education, are taking such issues into account in their plans, for example in the former through the adoption of a Post Primary Education and Training Policy.

7.2 There needs to be closer analysis of what would constitute sustainable, affordable, basic education for all in each specific country. One size does not fit all. Given the forcefulness of international initiatives, there has been an absence of locally developed solutions to improve basic education. The risk is that children are receiving a seriously sub-standard experience which is wasting not just large amounts of money but also wasting the opportunity to provide something worthwhile directed to their immediate needs and also their need as future citizens and workers. There is widespread acknowledgement that the quality of education, which very large proportions of pupils are receiving is very low.

7.3 The HIV/AIDS pandemics in Uganda and Zambia have not yet been addressed adequately. While Uganda, as a whole, has made a commendable effort to meet the challenge of reducing the

incidence of HIV/AIDS, there is still much to do to make a meaningful response within the education system. However, Zambia is in a very precarious state. Given the current incidence of the disease and the risks to those as yet uninfected, the basic education programmes have failed to prioritise their response sufficiently. Development Cooperation Ireland is continuing to make a very strong response to the challenge of HIV/AIDS. However, both countries need to be helped to prioritise appropriate HIV/AIDS interventions within their education systems. Since there are many elements of the education systems of the two countries which require fundamental attention, and since everything can't be prioritised as a matter of urgency, such prioritization will mean that some elements will be accorded less significance and less attention during a period of such crisis. If such action is not taken there is a risk that many of the other planned gains will be eroded.

7.4 There has been a relative exclusion of some key stakeholders, especially teachers' representatives, from the process of designing, planning and reviewing the sectoral programmes. In order to achieve the full participation and commitment of teachers in the delivery of the education programmes, they must be encouraged and enabled to play an active role in the various stages of programme design and review. Good initiatives have been implemented to enable non-governmental and civil society organisations to engage in the process in a meaningful way and these should continue to be supported. For the sector programmes to be fully inclusive of civil society stakeholders, the latter need to be helped to organise themselves into stronger umbrella organisations. In this way they may develop the capacity necessary to participate in policy dialogue and reviews. Ireland has provided a lead in supporting such developments and should continue to do so.

Development Cooperation Ireland Education Policy and Practice

7.5 In Uganda and Zambia, Ireland has become a valued participator in the development of the sector programme. It took considered risks, both in being one of the first external partners to provide financing to a pool in Zambia and in stepping up its financial commitment to Uganda. These risks have paid off. As a result of the substance of its engagement and the manner in which it has engaged, Ireland is seen as a trusted 'critical friend' of government which acts positively for the achievement of agreed goals. It is also respected for the extent to which it is well-grounded, especially as a result of its experience gained through the District level support.

7.6 For both countries, programme inputs, processes, activities and outputs are largely consistent with the Development Cooperation Ireland's Education Policy and Practice Guidelines (IA 2001). Development Cooperation Ireland's commitments to the sector programme in Uganda and the sub-sector programme in Zambia are entirely appropriate, given the advantages of these approaches in terms of supporting the creation and development of sustainable education systems led by government with the full participation of key stakeholders. Apart from the District level support, it is this engagement in sectoral programmatic approaches which has become the major focus of Ireland's involvement and the channel for the bulk of its financial assistance. For this reason, the performance of Development Cooperation Ireland in these two countries has to be gauged in terms of the performance of the sectoral programmes themselves. The move away from financial support to individual earmarked projects may be seen as a maturing of Ireland's development assistance policies. It has accepted the merits of the argument that it is best for a developing country to be assisted in ways which help it to grow its own government

structures and human capacity, which help it to take the leadership role, and which carry the aspiration that ultimately the process will be sustainable.

Development Cooperation Ireland General Policy and Practice

7.7 Development Cooperation Ireland is making highly significant contributions to the respective sector-wide education programmes. It is committed to a collaborative and harmonised approach which aims at simplifying the procedures for financial disbursement, monitoring and evaluation, thus reducing the transaction costs of the national governments and the funding partners. It thus cooperates in the design and conduct of the regular monitoring and evaluation activities of the programmes and avoids inefficient parallel monitoring and evaluation activities. A key dimension of this approach is an acceptance that the individual financial contributions of bilateral donors such as Ireland, will not be identifiable within the general pool of resource provision from all sources. Despite the fact that this assistance is not always exclusively via an un-earmarked budget support process, but is in certain instances earmarked to a specific sub-sector, in neither instance is it possible to trace the financial contribution of Development Cooperation Ireland in a discrete way, separated out from the contributions of the other contributors.

7.8 Development Cooperation Ireland therefore contributes to and accepts the periodic planning and review phases of the programmes, including annual work plans and budgets, physical and financial reports, appropriately audited by the national government audit system. However, from the perspective of Development Cooperation Ireland, it is important to regularly identify the relationship between Irish commitments made in the respective Country Programmes to the actual

financing, functioning and performance of the sector programmes as they proceed over time.

- 7.9** Development Cooperation Ireland has been committed to District level support for many years, a stance which is justified on a number of grounds, including support to capacity building and governance aspects across sectors at local level to ensure effective, efficient and accountable management and leadership; provision of opportunities to pilot test initiatives, such as Breakthrough to Literacy before scaling up, and, within the context of the sector programme, giving insights into how the programme is operating at sub-national level in order to deepen the knowledge and understanding of the central policy making bodies. The latter aspect has given Ireland a distinct advantage in the national dialogue on sectoral development.
- 7.10** However, in the environment of sector programmes, there is a further policy issue with respect to District level support and other interventions such as the Process Fund. Ireland is deeply committed to the sectoral approach but it is running the risk of creating confusion and even introducing distortion by supporting discrete activities lying outside the governments' sectoral programmes. It was noted above that a misperception had arisen about ownership of the Accelerated Decentralisation Process, with a unit in the Zambian Ministry thinking that donors were managing and driving the "project". At another level, rather than using its Zambian Process Fund to support Civil Society's engagement in the sector-wide approach, Ireland should strenuously advocate for resources to be made available within the programme itself for such purposes. There is a similar argument for merging the funding for Forum for African Women Educationalists of Zambia (FAWEZA) into the sector development programme. Not to do so is to risk sending strong messages from Ireland and some other donors that they do not as yet have sufficient confidence in the

process.

- 7.11** Another judgment to be made relates to the types of expertise required and how to provide it. Ideally Irish support to the Education Sector needs to bring together expertise in education management, gender, HIV/AIDS, public sector management, governance and the like, all engaged to a different degree at different times, dependent on the stage the process has reached and the requirements of the programme. For example, now that the sector-wide structures and systems are well embedded, the Uganda Education Sector Investment Programme II will need to pay more attention to technical aspects of education, including specialist sub-sectors such as early childhood development and secondary education and to ways of increasing quality overall.
- 7.12** To some extent it has been taken for granted that there is an implicit way of working in this new programmatic, sectoral environment. The core approaches which are now required, relate closely to ongoing collegial activity with representatives of the national government, other funding agencies and key stakeholders. There is a much greater emphasis on the process of bringing about change through the development of new and improved systems and structures and less on the management of stand-alone, sub-sector projects. To a larger extent, the skills required for sector-wide approach work are less technical and more interpersonal, diplomatic, political. This requires the mastery and deployment of a subtle range of techniques and approaches which include high-level negotiation, relationship building and maintenance, trust building, leadership and counselling skills. Few, if any, development agencies have paid sufficient attention to the identification and development of such higher order attributes, competences and skills.
- 7.13** The new collaborative ways of working in sector programmes means that the contribution of

individual organisations, other than the financial inputs and the deployment of staff, is difficult to identify and measure. Much of the value added is in the process aspects of the programmatic activities, particularly at national level. To do this requires the development and use of evaluation tools which would enable a better understanding of the role which Development Cooperation Ireland and its staff plays in the process. Evaluation now needs to capture the interactions, evaluate their quality and impact, and also provide an analysis of the skills, competences and personal attributes required in the various interactions exhibited by Development Cooperation Ireland. Such an approach is needed in order to help answer questions as to what has happened differently or better as a result of the engagement of Irish staff. What value has been added to the process? Answers to such questions are essential if Ireland is to take well informed decisions about the appropriate deployment of staff and in order to consider enhanced ways of cooperating with other agencies (including perhaps shared staff, "silent partnerships", etc). Answers to such questions are also necessary in order to guide the recruitment and professional development of staff.

7.14 Within the environment of the sector programmes in the two country programmes under review, it is essential that these functions are fully analysed in order to deepen the capacity of the individuals concerned to fulfil the required roles. Attention was drawn above to the extent to which advisers'

reports, with few exceptions, failed to note or analyse their own roles in the process. It may be that they are conscious of the ways in which they select from a range of strategies to determine the various interventions and contributions they make in discussion, decision-making, etc, but do not see a value in recording them. Alternatively, they may be doing their job intuitively and even using a range of approaches at random. It is suggested that they are likely to fulfil their roles more effectively through the development of a more self-aware approach in which they make a conscious decision to adopt a particular approach to suit the circumstances. Their internal reporting could then reflect this stronger focus on the part they are playing in the process. For Development Cooperation Ireland staff the shift of emphasis from project supervision and management to programme support has necessitated the development of the new working relationships, skills and competences referred above. Rather than performing well-understood managerial and administrative tasks, officials have increasingly had to focus on a less tangible set of interactions. The area based programmes do continue to require more of the well-established functions of management, administration, team leadership, and so on. However, staff are now required to commit much more of their time and energy to the different approaches necessary for productive collegial and cooperative working with governments, other agencies and stakeholders in civil society, all of whose contributions are necessary for successful support of the education sector.

8. RECOMMENDATIONS

Development Cooperation Ireland in Uganda and Zambia

Development Cooperation Ireland should:

- 8.1** Consider making a planning commitment to longer-term engagement in the countries it supports. Countries such as Uganda and Zambia need dependable support over many years. At least 10 years would be very helpful, not only in assisting governments to plan for longer timescales, but to signal commitment to them – perhaps with 5-year explicit minimum financial commitments - and also to other international partners that Ireland was committed to the long term development of the country. In so doing other financiers could be encouraged to longer-term support in a similar way.
- 8.2** Continue, for the intermediate future, to be engaged in District level support for purposes of (i) reality checking (ii) deriving essential information about how sectoral programmes are being implemented on the ground (iii) providing opportunities to pilot and test approaches and innovations which, if successful, can then be scaled up.
- 8.3** However, avoid distorting the planned development programmes agreed between the governments and the donors by providing additional funds to activities which lie outside the sector programme. Sufficient flexibility should be built into these programmes with budgeting enabling responses to be made to additional needs which emerge, for example for research, studies etc.
- 8.4** As sector programmes mature, and local capacity and standards of governance rise, review the necessity and value of continuing District level support and also of supporting initiatives outside

Uganda's and Zambia's sectoral development programmes, such as through the Process Fund and FAWEZA (Zambia) and to adult literacy (Uganda). Doing so would involve an even stronger effort to enhance the quality, effectiveness and efficiency of the sector programmes and simultaneously send a strong message to the governments of both countries and all stakeholders that Ireland was fully committed to this approach.

- 8.5** Advocate strongly for the prioritisation of HIV/AIDS responses within the education sector programmes, especially in Zambia, even at the expense of other developmental elements of the education sector.

Development Cooperation Ireland Education Policy and Practice

It is recommended that Development Cooperation Ireland should:

- 8.6** Refine its internal reporting mechanisms to ensure that its annual report for each country's sector-wide programme: (i) relates the progress of the programme's agreed targets, achievement of undertakings, etc, to the agreed three-year Development Cooperation Ireland Education Country Programme; (ii) identifies and comments on the reasons for any divergence, including financial disbursements, which has occurred, and (iii) outlines and comments upon the key contributions of Irish programme staff, technical assistance and consultancy to the process. The latter would normally be on the basis of a self-evaluation approach, but could on occasion, be augmented by independent evaluation. Neither should be allowed to become excessively demanding of time and other resources, either of Irish staff, national government systems and staff of other funding partners and stakeholders.

- 8.7** Seek to have the annual review mechanism strengthened to ensure that there is a sufficiently rigorous assessment of the progress made against the sector targets (this is a separate issue from mechanisms for the establishment and satisfaction of undertakings and conditions which provide appropriate triggers for the disbursement of tranches of financial support to the government budget). In undertaking these initiatives, care should be taken to avoid the creation of parallel reporting mechanisms. Wherever possible, Development Cooperation Ireland should continue to support the spirit of the sector-wide approach philosophy by contributing to and accepting the reports produced from within the system itself.
- 8.8** Continue to play an active role in the sector-wide approaches in the two countries through the provision of its human and financial resources. This engagement will necessitate the commitment of both headquarters and field-based staff. Considering the requirements of sectoral approaches for expertise - which is more "upstream" in terms of policy dialogue - in addition to technical expertise within the education sector itself, Development Cooperation Ireland should consider carefully the mix of competencies which it requires its staff to have. There is increasing need for officials with expertise in system-wide analysis, policy formation, planning and in building and maintaining relationships with government and the rest of the donor community, rather than purely education specific strengths.
- 8.9** Consider, if there is concern about over-commitment of its scarce technical and administrative resources, "silent partner" arrangements with other bilateral donors. If this route was to be taken, it would still be necessary to at least maintain a dialogue within such a partnership to ensure that the active partner had a complete understanding of Development Cooperation Ireland's objectives.
- 8.10** Review its policy with respect to the amount of active engagement there needs to be in the education sectors of countries which have developed mature sector programmes. At the point where Development Cooperation Ireland judges a country's central and regional management and administration structures are sufficiently well developed, it could withdraw its full time specialist education staff. Instead of full-time, continuous engagement, it could confine the direct participation of its professional staff to the semi-annual and annual planning and review missions, contributing specifically to the overall (but not the detailed) direction of the national plans, and to rigorous monitoring and evaluation.
- 8.11** Consider, at a further stage in the evolution of partner country capacities, the nature of its direct involvement in the education sector where the opportunity to provide budget support is not earmarked.
- 8.12** Where it is constrained by limitations on administrative budgets, consider innovative ways of finding internal expertise to manage increasing budgets. Strong teamwork and relationships are needed which can draw upon the mix of expertise at Headquarters and at the Embassy level. Additionally, some elements can be outsourced, either to specialist individuals or to agencies which can provide a range of services as and when required. Development Cooperation Ireland should consider contracting out as much as possible of the management of its District level support to non-governmental organisations or commercial agencies. This would free staff to concentrate on those aspects such as policy, project design, monitoring and evaluation, without requiring to take responsibility for day-to day project management.
- 8.13** Have not only a mix of staff skills and attributes, including both core professional expertise in the education sector but also the range of skills, competencies and attributes outlined above. In the

medium term, the programme will need to have staff who have the capacity to contribute both to the generic programme decision-making, monitoring and evaluation processes and also to the articulation and design of inputs directed at achieving quality improvements in sub-sectors such as teacher development, support and supervision, curriculum, assessment and pedagogical development, and the provision of good teaching and learning materials. In order to maximise the benefit of Ireland's contribution to sector programmes in education, the range of competencies and skills required for the generic contribution needs to be identified. Once these requirements have been established, Development Cooperation Ireland needs to strengthen and provide the necessary professional development opportunities, training and supervision for its staff.

- 8.14** Develop and use evaluation tools which would enable a better understanding of the role which Development Cooperation Ireland personnel play, in order to capture the interactions, evaluate their quality and impact and also provide evidence of the discrete contribution made by Ireland to the process.

ANNEX 1

Terms of Reference

Desk Study for Development Cooperation Ireland of Support to the Education Sector in Zambia and Uganda 2000-2003

Introduction

Development Cooperation Ireland considers basic education for all to be a human right and a prerequisite for sustainable development. The overall aim is to assist partner countries build sustainable education systems appropriate to the needs of the people and the country. While subscribing to the goals and targets set internationally, Development Cooperation Ireland supports the achievement of locally set objectives which are developed in consultation with stakeholders in the countries concerned. These broadly include: improving access and equity, enhancing quality and relevance and strengthening institutional capacity to develop and implement an appropriate and sustainable education system. Development Cooperation Ireland is also particularly concerned at the impact of HIV/AIDS on the education sector in sub-Saharan Africa.

Nevertheless, growing trend in delivery of development cooperation is that it is set in the wider context of international goals and delivered through Sector wide and programmatic approaches where direct implementation, management and subsequent attribution is directly delivered by Irish aid officials but through broader and more coordinated structures and systems.

Zambia and Uganda are important priority programmes for Development Cooperation Ireland and support to the education sector in these countries has constituted a significant element of country programme strategy.

Purpose of Study

The objective of this desk study will give an analytical overview of what is being achieved by Development Cooperation Ireland's programmatic spending and support to the Education Sector in Zambia and Uganda and this will be presented as a Public Expenditure Review to the Houses of the Oireachtas.

Scope and Focus of Study

The desk study will present an analysis of support to the Education Sector in Zambia and Uganda. It will examine the objectives of Development Cooperation Ireland's support to education in these countries and will look at the current validity of these objectives and their compatibility with the overall strategy of Development Cooperation Ireland in these countries.

The Review will analyse the merits of continued support to these approaches, the lessons to be observed and provide the basis for informed decisions in the future.

The study will analyse the nature of Development Cooperation Ireland support over the period and the modalities and the partnerships used. It will examine the extent to which the programme objectives have been achieved and the overall effectiveness of the support.

The study will review accountability structures within the programme, including the performance indicators that are used to monitor the programme and it will assess the progress made in the education sector in the countries concerned in the light of agreed targets.

Methodology

The exercise is a desk study and a wide range of documents will be made available to the consultant including independent evaluation reports, Development Cooperation Ireland's programme documents and documents produced by the Ministries of Education in Zambia and Uganda. In addition to providing an overview, the desk study will include case studies of important education initiatives supported by Development Cooperation Ireland in the countries concerned and appropriate information will be provided for these case studies.

It will locate the support to these sectors in the context of wider national and international initiatives and locate how Irish support is given within these structures.

The documentary material will be supplemented by interviews with Development Cooperation Ireland staff in Dublin and telephone interviews will be arranged with staff in Zambia and Uganda.

Selection of Consultant

The consultant will have strong analytical and report writing skills and will have proven ability of applying these skills in a development context. Experience in the education sector, experience in developing countries (especially Zambia or Uganda), and familiarity with sector wide approaches will be highly desirable. The consultant should also have experience of addressing gender and HIV/AIDS issues in an education context.

Reporting and time schedule

The desk study will take place between March and the end of April 2004. A draft report will be submitted to the Evaluation and Audit Unit of Development Cooperation Ireland and following comments it will be finalised for publication. A format for the report will be agreed with the consultant. A total of 25 consultancy days will be allotted to the desk study.

February 2004

ANNEX 2

Development Frameworks and Structures through which Development Cooperation Ireland funding is delivered.

Poverty Reduction Strategy Papers

One of the underlying principles of Development Cooperation Ireland, as articulated in the 1996 White paper, is poverty reduction. Development Cooperation Ireland has also provided support to the Heavily Indebted Poor Countries (HIPC) initiative, which was conceived to assist poor countries committed to eradicating poverty, by providing debt relief. Each country participating in this process has committed itself to the preparation of a Poverty Reduction Strategy Paper and the implementation of the strategies identified therein. A key understanding has been the role of human development, including education, in eradicating poverty. Accordingly, the drive to provide basic education for all has been prioritised in the drafting and implementation of these Poverty Strategies. An important dimension within this process has been the reorientation of budget allocation and expenditure away from other elements of the education sector, such as higher education, which had traditionally absorbed very large proportions of the funds available. Another outcome of the Poverty Reduction Strategy process is that in addition to the resultant debt relief welcomed by participating countries, external funding partners have been more willing to support initiatives linked directly to the Strategies.

Global Initiatives

There have been a number of other important global initiatives impacting on the development agendas of poor countries. For several decades, United Nations organisations have taken a lead in advocating for, and supporting, education development. UNESCO has had the lead international role for monitoring Education For All;

UNICEF has a mandate for the UN Girls' Education Initiative and advocates a focus on children generally. The World Bank has a dominant influence in many developing countries, not only because it has the capacity to make large loans available for the education sector, but also because of the influential role it plays in terms of policy development, systems reform and the choosing the modalities employed.

Modalities

Budget Support

In order to boost the ability of some countries to finance their development programmes, a number of funding partners have contributed funds directly to the government budget. This approach has been utilised in countries which have shown determination in fighting poverty, have sufficiently developed systems and human capacity to provide a reliable and transparent context for the planning, allocation, disbursement and accounting for externally provided funds. Among the benefits accruing to the recipient country are the consequent availability of dependable financial resources over a certain period and the reinforcement of the government's own systems as more funds flow through it, rather than through externally managed projects (which typically are "off budget" and are generally highly intensive in terms of transaction costs) over which the government regularly has limited control.

The Sector-Wide Approach

The sector-wide approach, which has become increasingly relevant, represents a move away from the traditional approach of discrete projects (often implemented outside of the government system) towards a combined effort, led by the national government. This structure is typically developed to include the direct involvement of key stakeholders and including local government, international donors and civil society. Together, they plan and support the implementation of a coherent programme of reform

and development, usually over a period of around five years, in which all major elements of the sector are brought together. These elements include dimensions such as classroom construction, recruitment, education and deployment of teachers, curriculum and pedagogical renewal and textbook provision. It also incorporates a number of financing modalities including project support, however, the essential point is that they are consistent with and inter-linked to the overall process. Sector programmes pre-date the Poverty Reduction Strategy process but, in principle, their philosophy is close to that of the latter and the two are generally mutually reinforcing with the sector programme being an element of the overall Poverty Reduction Strategy.

Principal Features of a Sector-Wide Programme.

- It is a partnership in which the Government has ownership and leadership of the sector, coordinates the external partners and includes mechanisms for consultation with stakeholders, both within the various levels of government and, where relevant, outside it. The approach brings together government and external partner funding within a unified education expenditure framework. While some donors contribute funds directly into the government system, others may choose to retain ring-fenced project procedures for their support. It can accommodate both approaches, provided that they form part of the overall sector programme.
 - They provide an opportunity and a challenge to agree a comprehensive education sector development framework based on a shared vision and priorities; to plan holistically and coherently across all sub-components of basic and secondary education. Programme plans, implementation, budgets, monitoring and evaluation are coordinated and managed over a timescale of five or six years. It has been found to be very beneficial to have a linked planning and budgetary cycle extending over several years, which facilitate predictable financial flows. However, the planning and management of
- the process needs to be flexible and responsive to Central, Provincial, Zonal and Local needs, right through to school level. There is a key role for local officials, including heads of schools, in formulating plans, and matching them to the available budgets. They will have the opportunity to negotiate for resources that match the needs in their areas, and will be able to have confidence that funds will be made available to support implementation of their plans, once agreement on the overall programme has been reached
- It is also advantageous to streamline administrative procedures for procurement and financial management through the adoption of the government's own systems, appropriately strengthened. This removes the necessity for complicated management of several different procedures operating in parallel systems and structures. It is important to enable financial savings, such as those made through efficiency improvements, to be retained for utilisation at the appropriate level.
 - The approach also helps to identify shortfalls in capacity and enables measures for capacity building to be incorporated within the education sector development plan.
 - In the development and implementation of a successful programme, it is necessary to ensure that there is widespread commitment by government and all other stakeholders, including civil society. Government and its international partners must be willing to change their behaviour to adapt to a new process, especially the emphasis on measuring the outcomes of the education system, rather than the inputs.

District-Level Support Programmes.

A further modality typically employed by Development Cooperation Ireland (and a number of other donors) is support at the District level. These programmes are normally poverty-focused multi-sectoral interventions, designed in consultation with local-level administration and communities and largely implemented by the local government line departments. Their objectives include:

- Contribution to local-level poverty reduction;
- Strengthening of local governance;
- Testing and monitoring impact of national policies and programmes.

Working at lower levels of administration, in theory, contributes to improved local governance. District level interventions normally work through local government and have an added objective of building capacity of civil servants. Through participatory planning they also seek to increase the capacity of civil society to articulate demands of the local systems and provide resources for self-identified priorities.

A challenge for these programmes is to ensure their consistency, harmonisation and responsiveness to broader policies and initiatives. In effect, they seek to be local components of broader programmes, creating capacity for implementation of nationally defined policies and strategies but allowing for local variation and piloting. However, it is recognised that there is not yet hard evidence that District approaches do have comprehensive poverty reduction impacts.

Projects

The traditional approach for development assistance has been through discrete projects usually with the host government's involvement. Successful projects have the advantage of being well targeted and implemented to meet specific needs. However, when poorly designed they also carry the potential disadvantages of (i) not addressing key priorities of the government and (ii) can divert scarce human and other resources from what the government itself would prioritise if free to do so. Where they are managed outside the government system they deprive that system not only of the opportunity to gain experience and to build its own capacity but to effectively coordinate and manage their own sector. They also can suffer from a tendency to concentrate on limited dimensions of the sector rather than taking a holistic approach.

Development Cooperation Ireland has expressly continued to engage in both project-type assistance where it is strategically appropriate and in the more general assistance via holistic programmes, such as the sector programmes and overall poverty reduction strategies.

ANNEX 3

Management Response

The independent review of the support to Basic Education in Uganda and Zambia is welcomed by the management of Development Cooperation Ireland. The review is broadly supportive of the approach that has been adopted and it notes that Development Cooperation Ireland is making highly significant contributions to the education sectors in both countries.

The review is particularly timely as Development Cooperation Ireland is currently revising its education policy. The findings of the Public Expenditure Review have already been presented to a workshop as part of the policy development process.

The evaluator has made a number of specific recommendations. Some of these are intended to contribute to policy development and others to improve the quality of the programmes supported by Development Cooperation Ireland. The following responses are made to the specific recommendations

8.1 Consider making a planning commitment to longer-term engagement in the countries it supports

In principle, Development Cooperation Ireland has entered into long term commitments with its programme countries, but up to now it has only been possible to commit funding on a three-year time scale in line with a Country Strategy process. The issue is under review at present and it may be possible to extend the commitment to five years, under certain circumstances.

8.2 Continue to be engaged at District level

In both Uganda and Zambia, Development Cooperation Ireland continues to engage at District level as well as at national level. This approach ensures a "reality check" within the sector programmes and also provides opportunities for piloting innovative approaches.

8.3 Ensure flexible support within the sector programmes

In dialogue with other partners and with governments, every effort is made to ensure that there is sufficient flexibility in the funding structure to ensure that emergent issues can be addressed. Working groups within the sectors are often in a position to identify research or studies that need to take place and these can then be budgeted within the sector programme.

8.4 Reassess the type of support to be given as a programme matures

The report notes that the support given by Development Cooperation Ireland has changed over the years, as sector programmes have developed. It also points out the need to continuously review the type of support given as sector programme become more mature. Development Cooperation Ireland will use the annual review processes to reassess and adapt the nature of its support.

8.5 Advocate strongly for the prioritisation of HIV/AIDS responses within education sector programmes

Development Cooperation Ireland has been strongly committed to addressing HIV/AIDS issues in the education sector and a number of significant interventions have been supported in Uganda in this regard. The organization is currently reviewing its HIV/AIDS policy and programmes and will seek to identify lessons that are relevant to the education sector.

8.6 Refine internal reporting mechanisms

At the Education Sector Meeting for Development Cooperation Ireland, a commitment was given to develop mechanisms to monitor the implementation of the education policy and in this context, the internal reporting mechanisms will be modified.

8.7 Strengthen annual review mechanism

Development Cooperation Ireland will work with partner governments and other donor partners to strengthen the annual review mechanisms.

8.8 Continue to play an active role in the sector-wide approaches in both countries through the provision of human and financial resources

Development Cooperation Ireland reemphasised its commitment to education in Uganda during the last Country Strategy Process and the programme in Zambia will be reviewed in early 2005 with a view to deciding on a new Country Strategy. Ongoing support to the education sector will be considered in this context.

8.9 Consider 'silent partner' arrangements with other donors

The organization is looking at this type of arrangement in other countries but does not see it as appropriate at present for education in Uganda or Zambia.

8.10 Review the type of engagement that is needed as a programme matures

Development Cooperation Ireland uses its three-yearly Country Strategy Process as an opportunity to reconsider the nature of its involvement in the various sectors in a particular country and also the type of management arrangement that is appropriate.

8.11 Consider how the education sector can be supported through general budget support where this is appropriate

Development Cooperation Ireland is aware that the education sector can be supported through a range of aid modalities. At present the education sector in Uganda is supported through General Budget Support as well as through sector specific funding. The sector working groups that have been developed as part of a sector-wide approach will remain useful, even if the funding channel should change.

8.12 Consider innovative approaches to strengthening management of the programme

As already mentioned, the management arrangements for a programme are reviewed at least every three years in the context of the revision of a Country Strategy.

8.13 Continue to develop the skills of staff

It is recognised that a wide range of skills are needed to support an education programme. Specialist staff have been employed both in Dublin and at Embassy level and ongoing staff development is a priority for the organization.

8.14 Develop evaluation tools to provide evidence of the contribution Ireland makes

The Evaluation and Audit Unit of Development Cooperation Ireland has the responsibility for planning a comprehensive programme of evaluations to provide evidence of the contribution that Ireland makes through its development activities and that attempts to learn lessons to strengthen the programme in the future. The Evaluation and Audit Unit works with independent consultants to develop appropriate evaluation tools for these evaluations.

28th March 2005

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