



Ministry of Foreign Affairs of the
Netherlands

IOB Evaluation

Unconditional trust: Dutch support to basic education in Bolivia (2000 – 2009)

Dutch support to basic education in Bolivia (2000 – 2009) | IOB Evaluation | no. 350 | Dutch support to basic education in Bolivia (2000 – 2009) |



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Preface

In 1999, the Dutch education policy for development cooperation was updated with the policy document '*Education: a basic human right*'.¹ This policy on basic education intended to support the embassies, to whom bilateral development cooperation was recently delegated, with the implementation of the sector-wide approach in education. In 2002, in response to a widely-supported proposal by Parliament, the Ministry of Foreign Affairs in the Netherlands agreed to increase the expenditures for basic education up to 15 % of the Dutch official development assistance, to be reached in 2007.² This led to a sharp increase in expenditures for education, the majority of which was spent through bilateral programmes of the Dutch Embassies, including in Bolivia.

More recently, in November 2010, the Ministry of Foreign Affairs presented a new approach to development cooperation, which has far-reaching consequences for Dutch education programmes in developing countries. There will be major a shift from social programs to investments in economic sectors. Education, and specifically basic education, is no longer considered a priority for the Netherlands. A large part of the cut back in expenditure will be realised by reducing the education sector-support programmes. Moreover, savings are made by reducing the number of priority countries for Dutch bilateral aid. Bolivia is one of those countries where the Embassy of the Kingdom of the Netherlands will be closed and the development cooperation will be phased out. Obviously, all these changes will affect the education programme of the Dutch Embassy in Bolivia.

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It is against this background that the results of the evaluation of the support by the Netherlands to basic education in Bolivia are presented. This evaluation forms part of a set of four country evaluations on basic education in Dutch partner countries (Bolivia, Zambia, Uganda and Bangladesh). These studies will feed into a broader policy review of Dutch support to basic education over the past ten years, which will be used to account for investments made by the Ministry of Foreign Affairs and learn from past experiences. With regard to the evaluation in Bolivia, IOB hopes to provide useful insights to inform the Embassy's education programme. Moreover, the report should also be valuable for other actors in the education sector, especially for the Bolivian government and other donors.

After a description of the methodology of the evaluation (Chapter 2), the report starts off with a brief outline of the political and socio-economic context (Chapter 3). Chapter 4 describes the education programme of the Netherlands in Bolivia. The Embassy has used two main instruments: (1) sector support to the Ministry of Education, and (2) support to international and national Non-Governmental Organizations (NGOs), and to research. Chapter 5 discusses the way in which the Dutch support has been provided (based on the principles of alignment, ownership, donor coordination and harmonisation, monitoring and evaluation). The domestic and external expenditures on education are described in Chapter 6, together with an analysis of the governance of the education sector (focusing on

¹ Ministry of Foreign Affairs (2000), *Education: a basic human right. Development cooperation and basic education: policy, practice and implementation*.

² Motion Hessing in 2001 (TK 28 000V nr 32).

decentralisation). Chapter 7 discusses the evidence regarding the effects of the education reforms and policies supported by the Netherlands, focusing both on educational quantity and quality. In chapter 8 conclusions are drawn with regard to the relevance, efficiency, effectiveness and sustainability of the Dutch contribution to basic education in Bolivia.

In short, the conclusions paint a picture of the Netherlands as an appreciated partner of the Ministry of Education in Bolivia, respected by other actors in the sector for its active and involved role, but with insufficient attention to effective monitoring of results of its investments in basic education. Unconditional trust in the Ministry of Education, despite evidence of disappointing results and in such a turbulent environment, seems to have impeded the effectiveness of the education programme of the Embassy. The exit strategy of the Embassy should provide options for enhancing the long-term effectiveness of the Netherlands' contribution to the education sector, supported by the relative stability in the Ministry of Education.

An international reference group, including Mr. Nick Taylor (JET Education Services), Mr. Yusuf Sayed (University of Sussex) and Mr. Chris de Nie (Ministry of Foreign Affairs) commented and advised on the draft report. Within IOB, the report was reviewed by Mr. Paul de Nooijer. IOB is responsible for the report's content.

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The report is written by Ms. Phil Compernelle (IOB) with support from Ms. Kirsten Mastwijk (IOB), drawing on the work of the evaluation team. The evaluation team consisted of Ms. Beatriz Cajías, Mr. Alfonso García Salaues, Mr. Arend Pieper, and Mr. Miguel Urquiola. The evaluation team would like to thank all those people who have contributed to the report through interviews and access to data and research. They are also grateful to the Embassy, in particular the senior education advisor Ms Anke van Dam and her team, for their support.

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Abbreviations

ALBA	Alianza Bolivariana para los Pueblos de Nuestra América (Bolivarian Alliance for the Americas)
BEIO	Bloque Educativo Indígena Originario (Indigenous Education Block)
BOB	Bolivianos
CDF	Comprehensive Development Framework
CEA	Centro de Educación Alternativa (Centre for Alternative Education)
CEBIAE	Centro Boliviano de Investigación y Acción Educativa (Bolivian Centre for Investigation and Educative Action)
CEPOs	Consejos Educativos de Pueblos Originarios (Indigenous People's Education Councils)
CIE	Comité Interinstitucional de Educación (Inter-agency Committee on Education)
CNC-CEPOs	Comité Nacional de Coordinación de los Consejos Educativos de Pueblos Originarios (National Coordination Committee of the Indigenous People's Education Councils)
COFASE	Comité del Fondo de Apoyo al Sector Educativo (Committee of the Fund to Support the Education Sector)
CONED	Congreso Nacional de Educación (National Education Congress)
CPE	Constitución Política del Estado (Political Constitution of the State)
DAC	Development Assistance Committee
EKN	Embassy of the Kingdom of the Netherlands
EUR	Euro
FASE	Fondo de Apoyo al Sector Educativo (Education Sector Support Fund)
FAUTAPO	Fundación Educación para el Desarrollo (Education for Development Foundation)
FIS	Fondo de Inversión Social (Social Investment Fund)
FPS	Fondo Nacional de Inversión Productiva y Social (National Fund for Social and Productive Investments)
GDP	Gross Domestic Product
HDI	Human Development Index
HIPC	Heavily Indebted Poor Countries
ICAP	Institutos de Capacitación (Training Institutes)
ICE	Índice de Calidad de Escuelas (Index of School Quality)
IDB	Inter-American Development Bank
IEB	Intercultural and bilingual education
IEHD	Impuesto especial a los hidrocarburos y derivados (Special tax on hydrocarbons and derivatives)
IMF	International Monetary Fund
INE	Instituto Nacional de Estadística (National Institute for Statistics)
JICA	Japan International Cooperation Agency
LLECE	Laboratorio Latinoamericano de Evaluación de la Calidad de la Educación (Latin American Laboratory for the Assessment of Quality of Education)

MAS	Movimiento al Socialismo (Movement towards Socialism)
ME	Ministry of Education
MDG	Millennium Development Goals
M&E	Monitoring & Evaluation
MFS	Medefinancieringsstelsel (Netherlands co-financing arrangement)
MNR	Movimiento Nacionalista Revolucionario (National Revolutionary Movement)
NFPS	Non-financial Public Sector
NGO	Non-governmental Organisation
OCE	Observatorio de la Calidad Educativa (Observatory of Educational Quality)
OPCE	Observatorio Plurinacional de la Calidad Educativa (Plurinational Observatory of Educational Quality)
OECD	Organisation for Economic Co-operation and Development
OTB	Organización Territorial de Base (Grassroots Organisation)
PEI	Plan Estratégico Institucional (Strategic Institutional Plan)
PIEB	Programa de Investigación Estratégica en Bolivia (Bolivian Strategic Investigation Programme)
PINS-EID	Proyecto de Institutos Normales Superiores en Educación Intercultural Bilingüe (Project for Intercultural Bilingual Education Teacher Institutes)
PND	Plan Nacional de Desarrollo (National Development Plan)
PNUD	Programa de las Naciones Unidas para el Desarrollo (United Nations Development Programme)
POMA	Programa Operativo Multianual (Multiannual Operational Plan)
PRI	Proyecto de Reforma Institucional (Institutional Reform Project)
PROME	Programa Municipal de Educación (Municipal Education Programme)
PRSP	Poverty Reduction Strategy Paper
REC	Reunión de Evaluación Conjunta (Joint Evaluation Meeting)
RUDE	Registro Único de Estudiantes (Unique Student Register)
SDC	Swiss Agency for Development and Cooperation
SEDUCA	Servicio Departamental de Educación (Departmental Education Service)
SIE	Sistema de Información Educativa (Education Information System)
SIGMA	Sistema Integrado de Gestión y Modernización Administrativa (Integrated Public Financial Management System)
SIMECAL	Sistema de Medición y Evaluación de la Calidad Educativa (Measurement and Evaluation System of Education Quality)
SISIN	Sistema de Información de Inversiones (System of Information of Investments)
SNV	Stichting Nederlandse Vrijwilligers (Netherlands Development Organisation)
SWAp	Sector Wide Approach
TGN	Tesoro General de la Nación (National Treasury)
TVET	Technical and Vocational Education and Training
UDAPE	Unidad de Análisis de Políticas Sociales y Económicas (Social and Economic Policy Analysis Unit)
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization

UNFPA	United Nations Population Fund
UNIBOL	Universidades Indígenas Bolivianas Comunitarias Interculturales Productivas (Indigenous, communitarian, Intercultural and Productive Bolivian Universities)
UNICEF	United Nations Children's Fund
USD	United States dollar
VIPFE	Viceministerio de Inversión Pública y Financiamiento Externo (Vice Ministry of Public Investment and External Financing)
WB	World Bank
WCEFA	World Conference on Education for All

Executive summary

This evaluation of the support to basic education in Bolivia took place between October 2010 and March 2011. The evaluation forms part of a set of evaluations of the Dutch contribution to the basic education sector in different countries.³ The set-up and scope of the evaluation in Bolivia differs from other country evaluations by IOB, but the objective remains to evaluate the relevance, effectiveness, efficiency and sustainability of the Dutch support to the basic education sector in the past ten years (2000-2009). The evaluation focused on the financial contribution to the Ministry of Education (ME), which represents nearly 70 % of the program of the Embassy of the Kingdom of the Netherlands (EKN).

The report starts off with a brief description of the political and socio-economic context (Chapter 2). The evaluation period (2000 – 2009) is characterised by political instability and unresolved conflict in the education sector, as in Bolivia in general. For example, the current minister of education has been in office for more than a year, but ten ministers preceded him since 2000.

As described in Chapter 3, the Netherlands has been a major donor in the education sector in Bolivia during the evaluation period, enabled by the commitment of the Netherlands to basic education, the sector-wide approach, and the delegated authority for Dutch embassies. The Netherlands has been appreciated as a stable and continuous partner of the Ministry of Education during some turbulent years. The Embassy has used two main instruments: 1) sector support to the Ministry of Education, and 2) support to international and national Non-Governmental Organizations (NGOs), and to research. The Embassy has set up a working group, the '*Mesa de Trabajo en Educación*', to enhance the synergy between different organisations working with the Netherlands in Bolivia.

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The overview provided in Chapter 4, shows a movement away from direct donor influence towards a large degree of ownership by the Bolivian Ministry of Education. This is accompanied by a gradual move by the Embassy from a more conditioned, earmarked type of support towards a more general sector support without earmarking. Moreover, significant progress has been made towards coordination and harmonisation with government policies and procedures. The basket funding in 2004 has been a major step forward. However, transaction costs for the coordinating donors are high and the group of donors willing to fully commit to the principles for aid effectiveness has remained small.

An analysis of the education sector expenditure in Bolivia, as described in the second part of Chapter 5, clearly shows that expenditure on education has grown over the evaluation period, both in absolute terms and as a percentage of Gross Domestic Product (GDP).

³ See: Ministry of Foreign Affairs (2008). Primary Education in Uganda. IOB Impact Evaluation No. 311; Ministry of Foreign Affairs (2008). Primary Education in Zambia. IOB Impact Evaluation No. 312.; Ministry of Foreign Affairs (2011). The two-pronged approach: Evaluation of Netherlands support to formal and non-formal primary education in Bangladesh (1999-2009), IOB Evaluation No. 353; Ministry of Foreign Affairs (2011). Evaluation of the budget support for Basic Education in Zambia. IOB Evaluation No. 354.

Primary education has received the bulk of education resources. At subnational levels, departments and municipalities account for more than half of the expenditure, mainly for teacher salaries and infrastructure. However, different studies of the distribution of public resources for education within Bolivia point out large variations in total expenditure per student per year between different departments and municipalities. On average, households spend about 6,5 % of their total expenditure on education.

Due to a lack of reliable data, it is impossible to evaluate the development of quality of education in Bolivia over the past ten years (Chapter 6). The implementation of standardised tests took place only between 1996 and 2000. At the moment, the availability of information about access to education is better. Recently there have been significant improvements in data collection by the Ministry of Education (e.g. the unique student register, RUDE). However, there are also negative developments in this area, which risks creating a situation in which quantity, equity *and* quality cannot be monitored.

Conclusions

The Netherlands has been appreciated as a stable and continuous partner of the ME during rather turbulent years. Other actors in the sector have also valued the active and involved role of the Embassy in the educational sector.

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In addition, the evaluation of the Dutch contribution to the education sector in Bolivia leads to one other main conclusion: even though recently it has been given more attention, there has been too little effective monitoring of results throughout the evaluation period, both by the Bolivian Ministry of Education and by the Embassy. On the one hand, the unstable environment hindered monitoring, while on the other hand it made close monitoring and follow-up on progress even more important. The monitoring that has taken place focused on financial monitoring and has not been used effectively, i.e. responding actively before evidence. As one of the largest donors, and a respected partner of the ME and other donors, the Netherlands should have played a leading role in this area. This conclusion has consequences for every response to the evaluation questions on relevance, efficiency, effectiveness and sustainability.

Relevance⁴

Dutch support to basic education in Bolivia can be considered relevant as far as government policies are concerned. The Netherlands has been a stable partner of the government. Its objectives are in line with Bolivian government's objectives. Increased leadership and ownership of the Bolivian government have been actively encouraged.

The education programme of the Embassy is, in principle, also consistent with the country's needs. The programme addresses key issues in the Bolivian education sector. The Embassy pays extra attention to relevance of education and the link with the productive sectors, which is relevant in the Bolivian context. However, it can be argued that for the support to

⁴ Relevance is defined as 'the extent to which the objectives of an intervention are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donors' policies'. OECD/DAC (2002), *Glossary of key terms in evaluation and results based management*.

maintain its relevance for beneficiaries and country needs, the government and donors should have responded more actively to the evidence of disappointing results at school level with regard to the quality of education.

Efficiency⁵

The Netherlands played a leading role in achieving progress towards the Paris Principles. This approach and the confidence in the capacity of the ME it implies, during some very restless times, has not been followed by all donors. Nevertheless, the basket members have been able to operate jointly, despite differences in appraisals. However, such an approach should be combined with more effective and closer monitoring, beyond what was undertaken during the evaluation period. The current programme is imbalanced as the promotion by the Netherlands of ownership of the Bolivian government is not matched by sufficient attention to accountability.

The picture is mixed regarding education sector management and governance, which affects the efficiency of implementing the country's education strategy as supported by the Netherlands. The Indigenous People's Education Councils (CEPOs), funded by the Netherlands, have been a case of exceptional success of popular participation in the education sector. However, the decentralisation process has gone no further than deconcentration, which is said to have impeded education reforms to reach the classrooms in large parts of the country. There is a wide variation in expenditure per student throughout the country, which does not seem to reflect differences in costs or targeting of the poor. In general, improved governance and capacity in the education sector should be encapsulated in broader government reforms.

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The Netherlands has contributed to the education sector in Bolivia in the past ten years through a mixture of support to the ME and to various NGOs. The Embassy has made an effort to strengthen the complementarity between the different instruments (e.g. by coordinating the NGOs supported by the Netherlands, and by using NGO support to either back the support to government or address problems that are insufficiently covered in the government's education programme).

Effectiveness⁶

Unfortunately, there is too limited data available to assess the effectiveness of the Dutch contribution to the education sector in Bolivia. Nevertheless, an analysis of household data undertaken as part of this evaluation provides some useful insights on education quantity. Access to education has increased over the past ten years, more so in rural areas, and both for girls and boys. However, late entry and school leaving from the age of 13 are still a

⁵ In this evaluation efficiency refers to the way in which the Dutch support to basic education is provided, focusing on the support to the government's education strategy (e.g. choice of instruments, donor harmonisation and alignment).

⁶ Effectiveness assesses the extent to which the direct results, or output, of an intervention contributed to the objectives, or outcomes. Effectiveness of the Dutch contribution to the education sector in Bolivia is measured by the outcomes of the Bolivian education policies and strategies mainly with regard to access, quality, relevance and equity.

challenge, especially in rural areas. Other studies have indicated that though the gap in access to primary education between indigenous and non-indigenous populations has diminished, differences in completion rates remain. This is of particular concern given that differences in schooling explain part of the income inequality in Bolivia. More research is needed to assess how access differs for different population groups or geographical areas, and how well different policies respond to those challenges.

Several small studies of education quality are available, some of which have been published with support of the Netherlands. Though they are not representative for the country as a whole, they are illustrative of some of the worrying circumstances in which Bolivian children receive their education. The incomplete implementation of reforms is apparently reinforcing existing processes of exclusion and limits the relevance of education in Bolivia.

It is also likely that in particular the limited attention to post-primary education and fragmented implementation of intercultural education during the evaluation period has reduced the relevance of education in Bolivia. The attention of the Netherlands to technical and vocational education addresses this concern. Hopefully, FAUTAPO's recent attention to improving its Monitoring & Evaluation (M&E) systems will generate useful information about the effects of their Technical and Vocational Education and Training (TVET) programme.

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Sustainability⁷

Analysis of education expenditure for the public education sector as a whole, including subnational levels, points to a reduced share of external financing. This trend will continue with the exiting of some major donors, including the Netherlands, in the next few years. Despite increased domestic funding, the Ministry of Education has been reliant on the basket funding for some crucial aspects of the education sector strategy (e.g. key positions in the Ministry, M&E and curricula development).

In addition to support through the basket funding and support to the Institutional Reform Programme (PRI) for the government as a whole, the Netherlands has contributed to two operational audits of the ME's capacity in 2005 and in 2009. From such external assessments of the institutional capacity of the ME can be concluded that important improvements have been made during the evaluation period. However, more effective monitoring, on the basis of relevant progress indicators and linked to more stringent follow up of institutional assessments, is required to ensure that investments made by the Netherlands result in sustainable improvements in the capacity of ME and subsequent progress in the education sector. Moreover, in the longer term, the capacity of the Ministry is also determined by the management and governance of the government as a whole.

⁷ The evaluation of the longer term impact of the Dutch support to the basic education sector is based on an assessment of the institutions and organisations that implement the national education sector strategy, i.e. the financial and institutional capacity of those institutions to function in the longer run and the way in which the Dutch support has contributed to that.

To finalize, though there still remain many conflicts to be resolved in the education sector, the recently approved education law '*Avelino Siñani - Elizardo Pérez*' might provide new impetus for the education reforms in Bolivia. This should be facilitated by the relative stability of leadership in the Ministry of Education in recent years. However, at the same time but independently determined, the relationship between Bolivia and the Netherlands has altered with the recent announcement of the closure of the Embassy and its development programme, including education, in the next few years.

This new state of affairs, coupled with a pressing need to improve the quality of education in Bolivia, commands a careful exit strategy for the Netherlands from the education sector in Bolivia. Though the support for the PEI 2011-2014 has already been committed, there remain areas through which the contribution by the Netherlands can be enhanced. The plans to monitor on results and link disbursements to performance on the basis of pre-defined indicators in this phase could be an important improvement, in line with the findings of this evaluation.

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Research questions and method

The Policy and Operations Evaluation Department of the Ministry of Foreign Affairs of the Netherlands (IOB)⁸ is responsible for reviewing the Dutch support to basic education in 2011. For this policy review, IOB will draw on several country evaluations, among which in Bolivia.⁹ IOB has already published impact evaluations of primary education in Uganda and Zambia, and has one on-going in Bangladesh.¹⁰

After a long start-up phase, the evaluation in Bolivia took place between October 2010 and March 2011.¹¹ The set-up and scope of this evaluation is limited compared to the other country evaluations, but the objective remains to evaluate the relevance, effectiveness, efficiency and sustainability of the Dutch support to the basic education sector in the past ten years (2000-2009). The evaluation concentrates on the support to the Bolivian Ministry of Education, given that this accounts for the largest part of the budget (68 %). The focus is furthermore on the contribution by the Netherlands to the sector rather than on the specific basic education sector policies and strategies of the Ministry of Education. Although the focus is on the Netherlands, and in particular the education programme of the Embassy, the Netherlands will be considered as one of many actors in the national education sector.

The key evaluation questions (Annex 2) that form the structure of the evaluation are based on the Dutch policy on basic education. They are organised according to the standard evaluation criteria of relevance, efficiency, effectiveness and sustainability of the Development Assistance Committee of Organisation for Economic Co-operation and Development (OECD/DAC).

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In the broader policy review as well as in the country evaluations, basic education is narrowly defined as primary education and first stage secondary education for children and youth.¹² In Bolivia the focus will therefore be on the compulsory eight years of schooling in the *nivel primario* (primary level, years 1-8, age 6 to 13) and the subsequent *nivel secundario* (secondary level, years 1 and 2 up to age 15 - 16).¹³ This implies that adult education, the *nivel*

⁸ Policy and Operations Evaluation Department (IOB), www.minbuza.nl/iob-en.

⁹ The countries have been purposefully selected in order to provide an overview of the world-wide support to basic education by the Netherlands.

¹⁰ Uganda: IOB (2008), Impact Evaluation: Primary Education in Uganda, IOB Evaluation no. 311; and Zambia: IOB (2008), Impact Evaluation: Primary Education in Zambia, IOB Evaluation no. 312.

¹¹ First discussions started in 2009. However, on request of the EKN, IOB awaited the results of the joint donor evaluation by the basket donors. Given the incomplete and inconclusive nature of that evaluation, and critique from both donors and Bolivian government, it was thereafter agreed that an additional evaluation study was still required and would add value. However, due to time limitations the scope and depth of this evaluation is inevitably limited compared to the other country evaluation undertaken by IOB.

¹² UNESCO ISCED definition. http://www.unesco.org/education/information/nfsunesco/doc/iscsed_1997.htm.

¹³ The curricular organisation (type of education, grades and cycles) in Bolivia is determined in the 'Ley Reforma Educativa 1565' of 1995. Currently secondary education, first and second cycle (years 3, 4) is also compulsory.

pre-escolar (pre-school) and education beyond the first cycle of secondary schooling (years 3 and 4) will not be evaluated.¹⁴

Nevertheless, basic education as defined for this evaluation will be considered in the context of the overall education sector strategy. This is particularly important in Bolivia given the fact that since 2004 the Netherlands supports the overall education sector strategy, not only primary education. Moreover, given the increasing attention to Technical and Vocational Education and Training (TVET) in the programme of the Netherlands (and Bolivian government), a key programme as FAUTAPO will be covered in the descriptive part of the report. Though an evaluation of the results of this programme would certainly be useful and timely, this lies beyond the scope and timeframe of this country evaluation.¹⁵

The evaluation is based on analysis of both qualitative and quantitative data. The main data sources for the quantitative data analysis are statistical data from: the Ministry of Education through the Education Information System (SIE), and the Integrated Public Financial Management System (SIGMA); the Vice Ministry of Public Investment and External Financing (VIPFE) through the System of Information of Investments (SISIN); the National Statistics Institute (INE); and the Social and Economic Policy Analysis Unit (UDAPE). As discussed in chapter 6, there are limitations to using the official education statistics of the past ten years. The qualitative analysis is based on extensive document and literature reviews and interviews with key stakeholders in the education sector, based in La Paz. Annex 3 and 4 provide overviews of the reviewed documents and literature, and of the people interviewed.

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Due to the holiday season it was not possible to involve the intended beneficiaries of the Dutch support to the education sector: schools, teachers and students. This limitation was overcome by including Bolivian education experts in the team with ample experience and knowledge of the education sector. Though the field visits to two schools (*Núcleo Patamanta* in *Pucarani* municipality), organised by Plan International, and an exhibition of the TVET courses, organised by FAUTAPO, were obviously too little to provide evidence for the evaluation, it did allow the other team members to get a feel of the environment in which some children and youth in Bolivia go to school in 2010.¹⁶

¹⁴ During the evaluation period, the Reforma organised formal, public education in four levels: 1) pre-school (ages 1 to 5); 2) primary (ages 6 to 13), with three cycles (basic, essential, applied); 3) secondary (ages 14 to 17), with two cycles; and 4) tertiary. According to law, primary education was compulsory and free. Besides the formal public education, so-called 'alternative' (*educación alternativa*) existed, including for example adult and special needs education. This system will change in line with the new education law (for example, since the new Constitution of 2009, secondary has now also become compulsory). The private sector ('*colegios particulares/privados*') also provides education in Bolivia, though not very large (no more than 10% of primary enrolment).

¹⁵ Unfortunately, the most recent evaluation focuses on the organisation itself and the processes, rather than the results. Wit, C. de et al. (2010), *Fundación Educación para el Desarrollo. Evaluación de medio término*.

¹⁶ The team is grateful to Plan International and FAUTAPO for organising these visits in cooperation with Embassy.

2

Context: Bolivia and education policy

The chapter starts off with a very brief summary of the political and socio-economic context of the past ten years. This is followed by a short description of the education system in Bolivia, and a more in-depth, but still summarised, analysis of the education policies and strategies between 2000 and 2009. Together, these sections sketch the environment in which the Netherlands has cooperated with Bolivian government, providing evidence of the turmoil that characterised the education sector during the evaluation period.

2.1 Context¹⁷

Political context

While Bolivia became independent from its former colonizer Spain in 1825, the foundations for the modern state were not laid until 1952, when Víctor Paz Estenssoro and the National Revolutionary Movement (MNR) introduced universal adult suffrage and land reform and adopted a state-led development model. The MNR regime was ended in 1964 by a military coup, which gave way to a series of short-lived military *juntas* which further expanded the role of the state in the economy. The armed forces remained in power through various *coups d'état* until the early 1980s. From 1982 on, power was gradually transferred again to a civilian government, and in 1986 a period of free-market liberal reforms was introduced, which focused on debt-stabilisation and rebuilding fiscal stability after inflation had risen to 20.000 % in 1985. These fiscal interventions turned out to be successful, causing inflation to drop to single-digit levels by 1993.

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A second wave of reforms between 1993 and 1997 led to decentralisation policies, education reforms, political and constitutional reforms, and privatisation of previously state-run companies. One notorious privatisation concerned the takeover of water resources by a foreign company in 1999, which effectively doubled the water prices. The subsequent so-called '*Guerra de agua*', or the '*Cochabamba Water Wars*', was the first of a series of popular protests to government policies that ended in the abandoning the privatisation project. In 2003 popular protests escalated once more into social confrontations about the exploitation of the country's vast natural gas reserves, nicknamed the '*Guerra del gas*' (Bolivian Gas conflict), which resulted in the resignation of president Sánchez de Lozada. Social unrest and uprisings went on continuously in the first few years of the new Millennium, as illustrated by an article in the newspaper *La Razón* (2010), stating that between 2000 and 2004, 14.513 blockades, marches, walkouts and strikes took place, averaging almost 10 conflicts per day.¹⁸ The '*Guerra del gas*' revived again in 2005 as gas protests resurged, after which yet another president, Carlos Mesa, was forced to resign.

¹⁷ This section is based on the following sources: (unless stated otherwise) The Economist Intelligence Unit (2001/2008), Country report Bolivia; The Economist Intelligence Unit (2001/2003), Country report Bolivia – October 2003/2008; PNUD (2007), Informe Nacional sobre Desarrollo Humano en Bolivia: El estado del Estado.

¹⁸ Razon, 2010: 96. Laserna y Villarroel (2008) have analysed conflicts in Bolivia over 38 years as tensions between different social groups, as well as ways of exercising civil rights. They note that since 2000 protests have been increasingly violent.

During the following elections in 2005 Evo Morales, the leader of the leftist Movement towards Socialism (MAS) was elected with an absolute majority as the first indigenous president of Bolivia. The election of Morales entailed a significant change, with Morales being an advocate of indigenous rights and a strong opponent of orthodox free-market policies and privatisation. However, political tensions have continued since the inauguration of Morales on 22 January 2006, especially between the central government in La Paz and the relatively wealthier departments in the eastern lowlands (known as the '*Media Luna*') about the demand for regional autonomy.¹⁹ In 2009, a new Constitution for the 'Plurinational State of Bolivia' was approved through a referendum. Shortly thereafter Morales was re-elected with again a large majority (64 %).²⁰ However, the large majority of the MAS in Parliament is said to pose a challenge to democratic processes in the country.²¹

Socio-economic context

Bolivia's economy is based on agriculture (the main agricultural products are sugarcane, soya and other oil-bearing seed crops, such as maize and sunflower) and the mining and hydrocarbon (natural gas) sectors.²² The mining industry has traditionally taken on a central role in the Bolivian economy (from silver in the colonial era, to tin and zinc-ore in the post-independence era and lithium and potassium in the recent years). Bolivia's hydrocarbon-sector has benefited from recent international price rises and an increase in production capacity. This has also positively affected the government's revenues, especially after the 2005 hydrocarbons law which imposed a 32 % flat tax (in addition to the existing 18 % tax) on the value of all oil and gas production, followed by the 'nationalisation' of the gas sector and renegotiation of contracts with foreign oil companies in 2006. This caused the public deficit to improve from a deficit of 2,3 % of GDP in 2005, to a surplus of 4,6 % of GDP in 2006, but shrinking again to an estimated 1,5 % surplus in 2010. For the coming years a modest fiscal deficit is expected as a result of fuel subsidies, stronger demands for public sector wage increases and growth in local investment projects.²³ Moreover, by benefitting

¹⁹ The opposition against the constitutional reform and the demands for regional autonomy culminated in 2008, when shooting during demonstrations in the northernmost department, Pando, killed at least 18 demonstrators in what is now known as 'the Pando Massacre'.

²⁰ This election was combined with controversial referenda on far-reaching departmental autonomy for four departments.

²¹ This is exacerbated by far-reaching constitutional changes, and increasing politicising, of the judiciary. This has been indirectly addressed, for example, by the High Commissioner for Human Rights, Ms. Pillay, during her visit to Bolivia. Press Conference by UN High Commissioner for Human Rights, Navi Pillay, La Paz, Bolivia (Tuesday 16 November 2010). Human Rights Watch (2011), *Bolivia Country Summary*

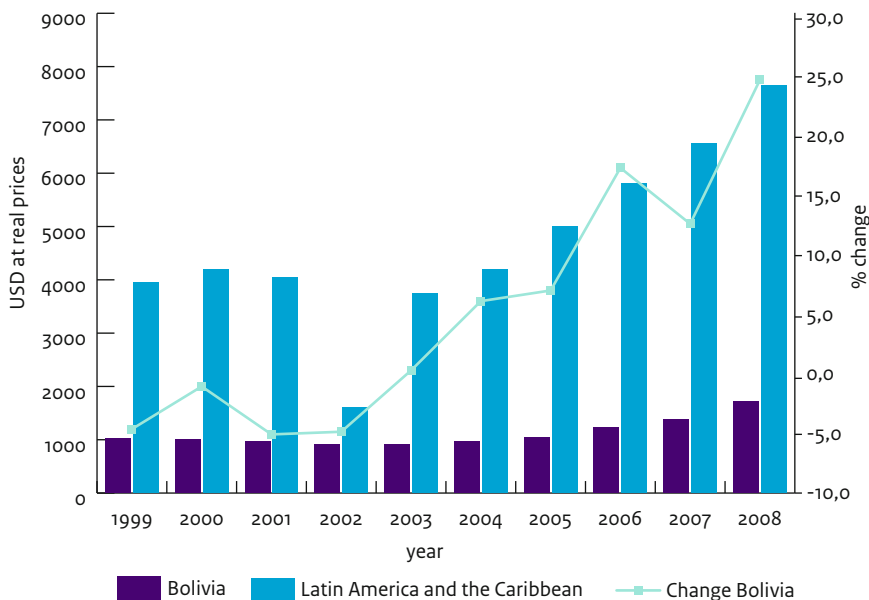
²² Bolivia's economic development is closely linked to its diverse geography. The Media Luna area is formed by the eastern and southern departments of the country, which are characterised by temperate lowlands with strong economies, boosted by arable farming and the presence of extensive oil and natural-gas reserves. The Altiplano area consists of the rugged Andes Mountains in the west (including the administrative capital La Paz). Agriculture at these heights is difficult due to the cold climate and strong winds, and a large part of the zone is inhabitable. The third geographical zone lies between the tropical lowlands and the Altiplano and is made out of the mountains and valleys of the two mountain ranges crossing this semitropical zone.

²³ NFPS (Non financial public sector) deficit. According to this source, there are increasing doubts about the accuracy of the fiscal accounts, however, slow implementation of public investment projects and relatively steady revenue should prevent larger deficits. Source: The Economist Intelligence Unit (2008), Country profile 2008 – Bolivia; The Economist Intelligence Unit (2011), Country report March 2011 – Bolivia.

from various debt-forgiveness initiatives, linked to relatively sound macroeconomic policies, Bolivia has been able to significantly decrease its foreign debt in the past decade (e.g. Highly Indebted Poor Countries (HIPC) debt relief initiated in 1999).

Nevertheless, although these actions significantly improved the fiscal position of the national government, Bolivia still remains among the least developed countries in Latin America and the Caribbean and one of the poorest in terms of GDP per capita, as can be seen in figure 2.1.

Figure 2.1 GDP per capita in Bolivia and Latin America, 1999-2009



Source: United Nations Data Retrieval System, <http://data.un.org>

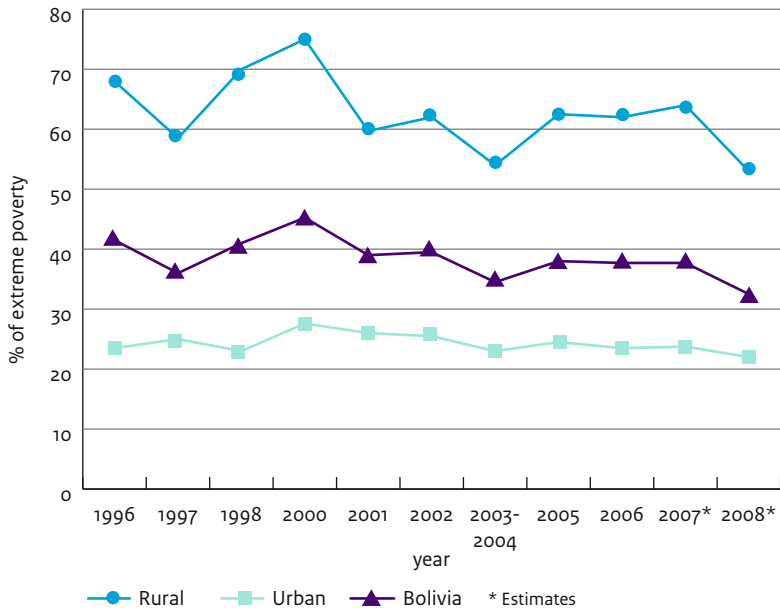
While Bolivia's GDP has increased over the past decade as can be observed in figure 2.1, this increase has been insufficient to reduce poverty significantly (graph 2.2).²⁴ The Human Development Index for Bolivia remains below the regional average of Latin America and the Caribbean.²⁵ According to preliminary estimates, in 2008 59 % of the population was living in poverty (74 % of the population in rural areas), and 33 % of the population lived in extreme poverty (53 % of the population in rural areas).²⁶

²⁴ The low growth elasticity of poverty in Bolivia has been described by, among others, Landa and Jiménez (2005)

²⁵ Website UNDP International Human Development Indicators <http://hdrstats.undp.org/en/countries/profiles/BOL.html>.

²⁶ UDAPE (2010), Dossier de estadísticas sociales y económicas. Series históricas sistematizadas de las principales variables económicas y sociales a partir de 1980 - 2009, Vol. 20. See also World Bank (2006), *Crecer beneficiando a los más pobres. Evaluación de la pobreza en Bolivia*. Informe n. 28068.

Figure 2.2 Percentage of population living in extreme poverty, 1996-2009



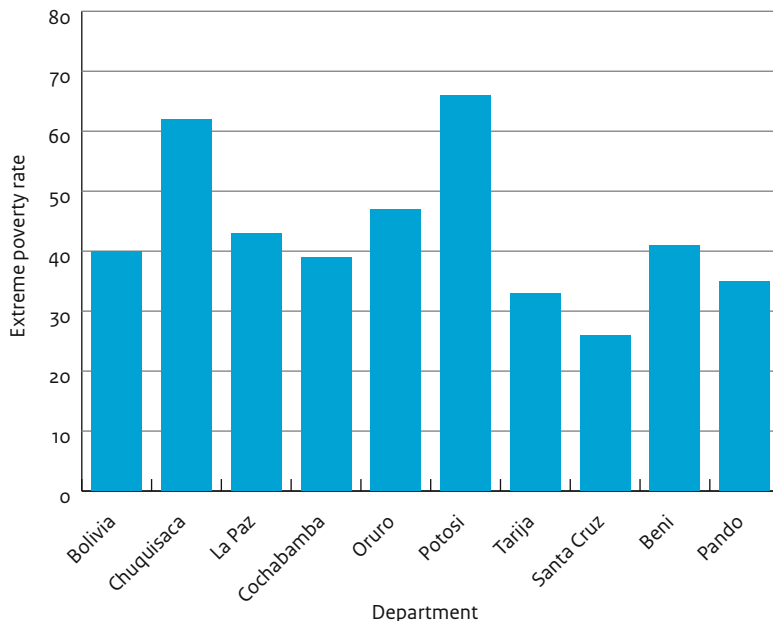
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Source: UDAPE (2010)

What is more, poverty levels in Bolivia vary strongly per department, with the highest extreme poverty rates in Chuquisaca and Potosí, which are also the departments with the highest levels of indigenous population (see figure 2.3).²⁷

²⁷ PNUD/UDAPE (2010), Bolivia Development Indicators. In: Human Development Bulletin.

Figure 2.3 Extreme poverty²⁸ rate by department, 2001



Source: PNUD/UDAPE (2010), *Bolivia Development Indicators*

Large regional and departmental differences in income have been further complicated by Bolivia’s continuous flow of migration, with large cities attracting more and more migrants from rural areas. Especially the richer departments attract migrants from other departments. For example, Santa Cruz, the department with the lowest poverty rate, had a 10 % share of population originally from La Paz and Potosí each, and 15 % of both Chuquisaca and Cochabamba departments. Consequently, the uneven distribution of the country’s population has further increased, with indigenous habitans increasingly exchanging their traditional rural lifestyle for the opportunities of the city.²⁹

According to the most recent national census conducted by the National Institute for Statistics (INE) in 2001, 30 % of Bolivians are of mixed origins, 28 % are Quechua, 19 % are Aymara and 12 % are of European origin; the remaining 11 % is of ‘other ethnic origins’. While forming a majority, the indigenous population has traditionally been excluded in both social and economic developments.³⁰ The United Nations Development Programme

²⁸ Extreme poverty is defined as the percentage of the population that does not have sufficient income to buy the basic food basket is meant.

²⁹ PNUD (2010), *Informe Nacional sobre Desarrollo Humano en Bolivia: Los cambios detrás del cambio. Desigualdades y movilidad social en Bolivia.*

³⁰ It is important to note, even without having to go into depth, that the terminology ‘indigenous’ does not cover a homogenous, fixed and predefined group of people. See Howard (2009), *Education reform, indigenous politics, and decolonisation in the Bolivia of Evo Morales*, in: *International Journal of Educational Development*, 29.

(UNDP) has calculated that the Human Development Index (HDI) for Bolivian municipalities in rural areas with a majority indigenous population tends to be lower than that of Bolivia as a whole, with the lowest HDI-scores belonging to the highland indigenous groups.³¹ According to UDAPE, in 2007 47 % of the indigenous population lived in extreme poverty, while only 25 % of the non-indigenous population lived in these circumstances.³² The Gini coefficient, a measure of inequality, of Bolivia is among the highest in the region.³³

This historically engrained, uneven pattern of socio-economic development and the large geographical and ethnic differences between the nine departments in Bolivia, in turn affect the political stability. The re-election of Morales in 2009 provides support for the development of a more inclusive, so-called '*Estado Plurinacional*' (Plurinational State) with emancipation of the indigenous population groups (i.e. the different nations). However, expectations thereof are high, which requires rapid results for the political support to be retained.

2.2 Education policies and strategies

To say the least, the past ten years have been turbulent years for the education sector in Bolivia. The *Reforma Educativa* (hereafter *Reforma*) was supported by successive governments between 1995 and 2006. At the same time, however, the government, the Catholic Church, urban teacher unions and universities have fiercely debated education sector strategies throughout the evaluation period, without reaching a consensus up to date.³⁴

The best way to illustrate the instability in the sector is by pointing out that between 2000 and 2009, there have been six presidents of State and eleven ministers of education (see figure 2.4), with the resultant changes in technical staff and subsequent approaches to the education sector.³⁵ Only the current minister has been in office for more than a year.

³¹ PNUD (2010), Informe Nacional sobre Desarrollo Humano en Bolivia: Los cambios detrás del cambio. Desigualdades y movilidad social en Bolivia.

³² The classification 'Indigenous' is based on mother tongue. UDAPE (2010), Dossier de estadísticas sociales y económicas. Series históricas sistematizadas de las principales variables económicas y sociales a partir de 1980 - 2009, Vol. 20. See also World Bank (2006), Crecer beneficiando a los más pobres. Evaluación de la pobreza en Bolivia. Informe n. 28068.

³³ The Gini coefficient in 2007 was estimated at 0.6 (1 is extreme inequality). UDAPE (2010), Dossier de estadísticas sociales y económicas. Series históricas sistematizadas de las principales variables económicas y sociales a partir de 1980 - 2009, Vol. 20. According to the UNDP (2010), Regional Human Development Report for Latin America and the Caribbean, this is the highest of the region (followed by Haiti at 0.6 and Brazil at 0.56).

³⁴ For an overview of the conflicts in the education sector, listing the amount of days teachers were on strike (varying between 23 in 2002 and over 50 in 2001/2003 and 2005), see Barié (2009), Entre Tizas y Pancartas. La Educación primaria en Bolivia.

³⁵ The organisation of the Ministry of Education (ME) also changed frequently. Therefore, throughout this report, the terminology 'Ministry of Education/ME' will be used, even when the name has changed during the evaluation period.

Figure 2.4 *Bolivia political context: Presidents and Ministers of Education*

Banzer	Quiroga	Sánchez de Lozada	Mesa	Rodríguez	Morales					
2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hoz de Villa	Anaya	Maldana	Carvajal	Ayma	Quiroga	Mejía	Patzí	Cáceres	Cajías	Aguilar

This evaluation focuses on the contribution of the Netherlands to the education sector in Bolivia and its results, taking the policies and strategies of the Bolivian government as given. However, the way in which these policies have been implemented is important as a background to the evaluation. The following analysis is based on extensive literature review and interviews, and the input of the education experts in the evaluation team.³⁶

Overall, three periods can be identified in the development of the education system in Bolivia, closely related to political and social events:

- 2000-2002: Implementation of the *Reforma* (started in 1995)
- 2002-2005: Standstill *Reforma* in a period of increased political instability
- 2006-2009: Preparation of *Ley de la Educación ‘Avelino Siñani - Elizardo Pérez’*

2000-2002

The first period under evaluation runs between 2000 and 2002, but actually refers to the first stage of implementation of the *Reforma* since its establishment by law in 1994.³⁷

- During that period the curriculum for primary education was developed.
- Intercultural and bilingual education (IEB) was promoted in response to the socio-cultural heterogeneity of the country (on the basis of small-scale, pioneering projects since the

³⁶ Key documents are: Contreras, M.E. y M. L. Talavera (2004), Examen parcial. La reforma educativa boliviana 1992-2002; Yapu, M. (2009), La calidad de la educación en Bolivia. Tendencias y puntos de vista; Cajías, B. (2000), Formulación y aplicación de políticas educativas en Bolivia 1994-1999; Pérez S. V. B., y S. M. Oviedo (2002), Estado de situación de la educación en Bolivia; policy documents of the ME (e.g. on curriculum development, PEI, ASEP) and reports from education meetings (such as the ‘Workshops in preparation for the national education conferences’, Foro Educativo Boliviano and the Observatorio Social de Políticas de Bolivia).

³⁷ Government of Bolivia (1995), Ley 1565 de Reforma Educativa. About the Reforma, see (among others): Cajías, B. (1995), 1995: la educación boliviana ante el desafío de la reforma. En Informe Social Bolivia 2; Gamboa, F. (1998), Contra viento y marea, tras las huellas de al Reforma Educativa en Bolivia.

1970s).³⁸ Previously, the education system aimed at assimilating all students into the then dominant culture (Spanish).³⁹ Teachers were trained including through specialised teacher training institutes for bilingual education (*Proyecto de Institutos Normales Superiores en Educación Intercultural Bilingüe* PINS-EID). Books were published in different indigenous languages.

- Entities of popular participation were established and the decentralisation process was initiated by transferring responsibilities to municipal and departmental levels (see section 5.1).
- For the first time, the ME worked together with universities to improve teacher training. Materials were developed and distributed. In many schools throughout the country 'learning corners' and libraries appeared as part of the new pedagogical methods.⁴⁰ However, the national policy of teacher training and development was not adapted accordingly (e.g. no new curriculum), which led to a fragmented process of modernization.⁴¹
- Annual evaluation reports were published between 1996 and 2000 by SIMECAL (Measurement and Evaluation System of Education Quality), the institution responsible for evaluating education quality. These reports assessed the progress in language and mathematics and identified key determinants of differences in achievements between students (see also section 7.1). Unfortunately, the evaluations were not used to provide input into the education strategy and the testing by SIMECAL was discontinued in 2000.⁴²
- In sum, according to Contreras and Talavera (2004), most of the intended reforms of the *Reforma* were implemented by 2000, albeit not throughout the country.⁴³

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2002-2005

During the second period, from 2002 to 2005, the *Reforma* still applied but little advance was made with its further implementation and roll out. This period is marked by political instability, with rapid succession of different ministers of education.

³⁸ Bilingual education, which assumes teaching in the mother tongue facilitates learning, is highly relevant in Bolivia. Analysis of the 2002 and 2008 household surveys, points out that of the Bolivian population between the ages 6 and 13 roughly 26% have Aymara, Quechua, Guaraní or another indigenous language as their mother tongue, rather than Spanish. Of the 74% that have Spanish as their mother tongue, 83% only speaks Spanish. So overall, almost 40% of school-age children speak a native language or have it as their mother tongue. For more information, see Benito Fernández (2000) 'Principales experiencias y propuestas sobre Educación Intercultural y Bilingüe desarrolladas y planteadas en Bolivia', en la memoria del seminario La Educación Intercultural Bilingüe en Bolivia. Balance y perspectivas.

³⁹ For an interesting discussion on the concepts of inter- and intraculturality over the past years, see Howard (2009), Education reform, indigenous politics, and decolonisation in the Bolivia of Evo Morales, In: International Journal of Educational Development, 29.

⁴⁰ Described, among others, in Yapu, M. (2010), Una evaluación de políticas educativas: cambios contextuales y las implicancias para los municipios de Yotala, Yamparáez, Tarabuco y Mojocoya, comparing pre-Reforma, Reforma and the proposals for the new education law. See also Contreras, M.E. y M. L. Talavera (2004), Examen parcial. La reforma educativa boliviana 1992-2002.

⁴¹ Martínez Portocarrero, J. L. (2002), Educación Primaria. Análisis y propuesta de política pública.

⁴² See among others, Yapu, M. (2010), Una evaluación de políticas educativas: cambios contextuales y las implicancias para los municipios de Yotala, Yamparáez, Tarabuco y Mojocoya.

⁴³ Contreras, M.E. y M. L. Talavera (2004), Examen parcial. La reforma educativa boliviana 1992-2002.

- The Ministry of Education did not deal with the education sector as an integrated system. Due to the political turmoil at that time, curriculum development halted at the first levels of primary education. Secondary education was treated as a mere go-between primary education and universities.
- Progress was made with the indigenous language component of the bilingual teaching methodology. However, the development of teaching of Spanish as a second language was delayed. This discrepancy became one of the reasons for opposition against the policy by indigenous parents who expected their children to use Spanish to escape from their disadvantaged socio-economic position.
- Already in 2002, Pérez and Oviedo noted that the so-called '*ramas diversificadas*', i.e. regionally specific part of the curriculum, were hardly promoted by the national government, nor being delegated to subnational levels (e.g. departments or municipalities).⁴⁴ This impeded its roll-out throughout the country except where indigenous organisations themselves took the responsibility.
- The decentralisation process was continued gradually, but did not move beyond deconcentration.⁴⁵
- The system for teacher training and development was insufficiently developed. In-service training through pedagogical advisors was abolished in 2004 due to opposition of teacher unions and weakness of the responsible departmental education services.⁴⁶
- Without supervision, the achievements with regard to the pedagogical methods were not sustained, apart from special efforts made by national and international NGOs.
- In 2003 the ME organised a series of public events in preparation of the national education conference, which provided new impetus to the education sector from a wide variety of stakeholders in and outside the sector.⁴⁷ Unfortunately, the conference itself did not take place due to opposition from the urban teacher union, the change of minister and the political instability at that time.
- However, the Ministry did develop a national sector-wide education strategy for 2004-2008 POMA (Multiannual Operative Plan). Though the strategy covered all levels of education, primary education was still seen as one of the main priorities (table 5.3 illustrates how this is also evident in expenditure patterns).⁴⁸
- SIMECAL, after having stopped evaluating in 2000, was ultimately abolished in 2004.⁴⁹

⁴⁴ Pérez and Oviedo (2002), *Estado de situación de la educación en Bolivia*.

⁴⁵ Deconcentration is considered the most limited type of decentralisation. This is discussed in more detail in chapter 5.

⁴⁶ Talavera (2002), *Innovation and resistance to change in Bolivian schools*.

⁴⁷ Campaign '*Hacia el II Congreso Nacional de Educación*'. The results of these workshops were collated by the ME in the publication '*Diálogo Educativo*'. The participants were generally very critical of the implementation of the *Reforma Educativa*, especially with regard to the above-mentioned issues. See also Pérez S. V. B., y S. M. Oviedo (2002), *Estado de situación de la educación en Bolivia*. In 2004, with the new government of Carlos Mesa, and a new minister of education, another series of meetings was organised.

⁴⁸ As also noted by the EKN. See for example; EKN La Paz (2001), *Aantekening Sector Onderwijs*, 12.04.2001; EKN La Paz (2004), *BEMO Apoyo al Plan Operativo Multianual de Educación*; EKN La Paz (2005), *Medium-Term Plan 2005-2008*; EKN La Paz (no date), *Sector Track Record Education Bolivia 2009*.

⁴⁹ See among others, Yapu, M. (2010), *Una evaluación de políticas educativas: cambios contextuales y las implicancias para los municipios de Yotala, Yamparáez, Tarabuco y Mojocoya*.

2006-current

The third period starts with the change of government in 2006 and lasts up to date. With the change of government, a new vision of the Bolivian State was promoted, as expressed in the PND in 2006 (National Development Plan) and the new CPE in 2009 (Political Constitution of the State). This period is characterised by heated and often ideological debates about education, connected to the transformation process on-going in the whole of Bolivia.

The new government renounced the *Reforma*, and the POMA, as being ‘discriminating and neo-colonial’.⁵⁰ In the absence of a new strategy to replace the *Reforma* and POMA, the overall goals of the POMA were continued, though subsequent annual plans reflected different interpretation of the objectives. A draft for a new education law (*Anteproyecto de Ley*) was presented at the second national congress in July 2006.⁵¹ The delegations of the urban teacher unions, public universities and Catholic Church, among others, walked out of the congress.

Awaiting the approval of the new education law, the Strategic Institutional Plan (PEI) was developed in 2008 for the period 2010-2014. Key issues of this strategy are:

- inclusive education as part of a Plurinational State;
- productive education, including linkages with the labour market;
- education completion (using incentives such as school transport and boarding for both primary and secondary education);
- education quality, with interventions ranging from nutrition, early childhood development, special needs education, improving teacher training, use of technology and indigenous knowledge;
- education management, with community participation and public accountability of education expenditures.

It took until December 2010 for the new education law *‘Avelino Siñani - Elizardo Pérez’*, to be finalised and approved by parliament (while the opposition remains strong). As a result, the education sector experienced a so-called ‘educational limbo’ between 2006, with the renunciation of the *Reforma*, and 2010, with the introduction of the PEI and the new education law.⁵² During that period, the *Reforma* continued to be the most relevant education strategy for a lot of teachers and pupils at classroom level. In some instances, there is evidence that *pre-Reforma* practices are reintroduced, due to a lack of guidance, methods and materials.⁵³ This is a particular problem for secondary education, which has not been reformed since 1975 due to the *Reforma’s* phased approach, starting with primary education.

⁵⁰ See for example Government of Bolivia (2007), *Plan Nacional de Desarrollo*, p 67: ‘La política de Reforma Educativa aplicada en el país no ha logrado superar el modelo colonial que conlleva procesos de exclusión, discriminación, marginación y explotación.’ The abolishment of the *Reforma* was approved through Decreto Supremo 2825.

⁵¹ Ministerio de Educación y Culturas (2006), *Ante Proyecto: Nueva Ley de Educación “Avelino Siñani y Elizardo Pérez”*. (Documento de socialización).

⁵² *Nuevas Palabras* (2008), *Ausencia de ley sume a Bolivia en un ‘limbo’ educativo*, in: *Nuevas Palabras*, 118.

⁵³ Yapu, M. (2009), *La calidad de la educación en Bolivia. Tendencias y puntos de vista*.

Secondary education has retained a relatively low net enrolment rates between 55 % and 60 % during the evaluation period.⁵⁴

Nevertheless, even though no advances could be made with the improvement and transformation of the education system, for example with regard to the curriculum development,⁵⁵ important stand-alone projects were implemented by the ME. For example, more teachers were employed (3.850 in 2006, 4.022 in 2007) and more than 12.000 interim teachers were trained to be upgraded to professional teachers.⁵⁶ A large alphabetisation programme, ‘*Yo sí puedo*’, was rolled-out with the help of Venezuela and Cuba, after which Bolivia was declared illiteracy free by the United Nations Educational, Scientific and Cultural Organization (UNESCO) in 2008. Thirty-three municipalities benefited from the ‘*Niña Indígena*’ (Indigenous girl) programme, supported by United Nations Children’s Fund (UNICEF) and financed by the Netherlands, whereby an integral approach with transport, school breakfasts, boarding and improvements to infrastructure aims at reducing the last of the gender gap in primary education completion.⁵⁷ Also with respect to intercultural and bilingual education advances have been made, among others, through the establishment of UNIBOL (Indigenous, communitarian, Intercultural and Productive Bolivian Universities).⁵⁸

Moreover, the ‘*Bono Juancito Pinto*’ (conditional cash transfer) was introduced as a nationwide programme in 2006 with the aim of tackling drop-out in primary schools.⁵⁹ The group of beneficiaries has expanded since 2006 and now includes all children in public schools who

⁵⁴ UDAPE (2010), Dossier de estadísticas sociales y económicas. Series históricas sistematizadas de las principales variables económicas y sociales a partir de 1980 – 2009, Vol. 20. As will be discussed in chapter 6, there are concerns about estimates of net enrolment rates in Bolivia (e.g. due to population estimates).

⁵⁵ Several proposals were made (2007, 2008, 2009 and 2010) by a team of professionals and stakeholders, including indigenous knowledge, in the ME (supported by donors, including the Netherlands – see chapter 3.3), some of which were presented publicly (2008). However, its finalisation depended on the approval of the new education law. Now that this has been approved, the long-awaited and necessary curriculum can be rolled out at the earliest in 2012. Interview current Vice Minister of Education: ‘La currícula todavía no se ha terminado. En su elaboración se tomará(n) en cuenta muchos aspectos, como la dinámica del país, de la región, de las autonomías, de las capacidades productivas’. Source: La Razón (2010), ‘La nueva Ley Educativa propone 10 cambios’, in: La Razón, 17/12/2010.

⁵⁶ UDAPE (2008), Informe de progreso de los Objetivos de Desarrollo del Milenio.

⁵⁷ This particular programme ran from 2006 to 2010. Source: EKN La Paz (2005), Memorandum ter beslissing Voorstel Onderwijsproject Bolivia van UNICEF Nederland.

⁵⁸ It is important to note that the approach to intercultural and bilingual education changed compared to the Reforma. See, for example, Howard (2009), Education reform, indigenous politics, and decolonisation in the Bolivia of Evo Morales, In: International Journal of Educational Development, 29.

⁵⁹ The grant consists of an annual voucher of 200 bolivianos for the parents of children who attended class for at least 80% of the school year (up to September). It is distributed to the parents (preferably mothers) by the armed forces on the basis of student registration (RUDE). See Reglamento de Pago del BJP 2010. Presentación disponible en: Organización Internacional del Trabajo, Oficina Regional América Latina y el Caribe, <http://www.oit.org.pe/index.php>.

attend the first eighth grades of regular, special and alternative primary education (less than 18 years old). The ME and the EKN maintain that the grant has had an effect on the enrolment and retention of children in primary schools. However, unfortunately, there is to date no research to confirm such statements.⁶⁰

However, though there has been more continuity in the leadership of the ME since 2008 and the new law has been approved in Parliament, several key stakeholders, such as the teacher unions but also the Catholic Church, continue to oppose the implementation of the education sector reforms and strategy beyond such stand-alone programmes.⁶¹

2.3 Conclusions

The *Reforma* was only partially implemented between 2000 and 2005, and discontinued without replacement in 2006 until 2010. Important reforms such as modernisation of teaching practices and intercultural and bilingual education were realised to some degree and in some places, but only for primary education and never expanded throughout the country. The political instability in the country, and in the Ministry of Education, during a large part of the evaluation period has been a major impediment to the implementation of education reforms.

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This fragmented implementation of education reforms, during the *Reforma* and thereafter, is said to have continued existing processes of exclusion and limited the relevance of education (e.g. link with labour market). The effect on access and quality of education will be discussed in chapter 6.

However, even without a new government education strategy in the past few years, large stand-alone programmes have been implemented since 2006. The largest programmes are the introduction of the *Bono Juancito Pinto* for primary education and the nationwide alphabetisation programme. Yet these programmes were implemented without support by traditional donors such as the Netherlands (see chapter 5). In the past year an education sector strategy has been developed and the new law '*Avelino Siñani - Elizardo Pérez*' was finally

⁶⁰ While it is clear that the uptake of the grants has increased, this has to date not been linked to reductions in drop out rates (PNUD, 2010). UDAPE is currently working on an evaluation of the *Bono Juancito Pinto*. The implementation and design of the *Bono Juancito Pinto* make it difficult to determine its causal impact on enrolment. This is in contrast with the situation in some Latin American countries, in which these programs were implemented with experimental treatment and control designs.

⁶¹ The teacher unions play a very important role in the education sector in Bolivia. They are well organised and militant, having opposed all different governments throughout the evaluation period. However, the unions have been weakened, because of a distinction in organisation and opinions between the urban and rural unions (for example, in 2006, the urban unions left the National Education Congress while the rural unions remained active). The article by Lopes Cardozo (2009) discusses the different conflicts in which teachers (unions) are involved. See for a historic overview; Talavera, M. L. (2002), Innovation and resistance to change in Bolivian schools, in: *Prospects*, XXXII : 3; and Contreras, M.E. y M. L. Talavera (2004), *Exámen parcial. La reforma educativa boliviana 1992-2002*.

been approved, which is expected to provide new impetus to education reforms. However, this will require solving outstanding conflicts with several key stakeholders in the education sector, such as the teacher unions. As the history of education reform in Bolivia has shown, this is not an easy task.

3

Dutch support to basic education in Bolivia

This chapter provides an overview of the Dutch support to the basic education sector in Bolivia over the past ten years, the objectives of the support and the different instruments used thereto. Given that a large part of the portfolio consists of direct support to the ME (more than 68 %), the Netherlands’ contribution to institutional strengthening of the ME receives extra attention.

3.1 Background

Netherlands support to the Bolivian education sector dates back to 1993 and has developed over time into a combination of support to government and to non-governmental entities (NGOs and research). This development can be divided into five, partly overlapping, phases.

	1993-1994	1994-2001	2001-2004	2004-2009	2010-2014
Support to ME	n/a	Joint co-financing of World Bank programme	Direct support to Ministry of Education	Basket support to Ministry of Education, together with Sweden, Denmark and Spain	Basket support to ME, together with Sweden, Denmark, Spain and United Nations Population Fund (UNFPA)
Support to NGOs and research	Exclusively project support	Support to a number of NGOs flanking government support	Flanking government support, local and international NGOs	Flanking government support, research, local and international NGOs	Flanking government support, research, local and international NGOs

Source: EKN La Paz (2010); EKN La Paz (2003); EKN La Paz (2004); EKN La Paz (2001).

Analysis of policy documents from the EKN, interviews in Bolivia and the Netherlands point out three main factors that have been influential for the development of the Dutch education programme in Bolivia. First of all, the Netherlands has been committed to basic education since the World Conference on Education for All (WCEFA) in 1990 in Jomtien, Thailand.⁶² In 1999, the Dutch education policy was last updated with the policy document ‘Education: a basic human right. Development cooperation and basic education: policy,

⁶² In 1992, the policy document ‘Development Cooperation and Education in 1990s’ was published by the Ministry of Foreign Affairs. It was clearly inspired by WCEFA and focused on aid for basic education, through bilateral and multilateral channels. Until then, the focus of the Dutch education policy had been on vocational and higher education. For a review, see Ministry of Foreign Affairs (1992), *Development Cooperation and Education in 1990s*.

practice and implementation'.⁶³ In response to the findings of the mid-decade review of the WCEFA in 1996 and preparations for the second WCEFA in Dakar, Senegal in 2000, the focus shifted from access to education to improving the quality of learning. Access (enrolment and completion in primary education) remained important of course, not in the least because of the Netherlands' commitment to the Millennium Development Goals (MDGs).

Moreover, in 2002 the Netherlands Parliament formulated an explicit request to increase the expenditure for basic education up to 15 % of the Dutch official development assistance in 2007.⁶⁴ This resulted in major budget increases for education programmes in developing countries and permitted the Netherlands to become the main education donor in Bolivia.⁶⁵

The second factor of influence was the decentralisation policy of the Dutch Ministry of Foreign Affairs in 1997 that allowed embassies to play a relatively independent role in the design, appraisal and commitment of development activities.⁶⁶ The Embassy in La Paz installed a specialised team with extensive education expertise (both Dutch and Bolivian team members). As will be discussed in more detail below, the education programme developed by the EKN consisted not only of cooperation with the ME, but also cooperation with a variety of NGOs and institutions active in the education sector in Bolivia. The delegated authority of the EKN and its subsequent wide involvement in the sector allowed the Embassy to gain a strong profile.

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Finally, in 1998 the Netherlands decided to redirect bilateral development cooperation away from project aid to a Sector-Wide Approach (SWAp) with the aim of increasing the effectiveness of aid delivery.⁶⁷ This approach was also included in the Dutch policy on basic education of 1999. The approach includes, among others, allowing national authorities (including subnational levels) to take responsibility for both policy formulation and implementation, including the administration of aid funds. The ultimate aim was to provide sector budget support. In each country, two to three sectors were to be selected as so-called concentration sectors in which the sector wide approach was to be applied.⁶⁸ In Bolivia the education sector was selected without much discussion about its importance to the development process, but

⁶³ Ministry of Foreign Affairs (1999), *Onderwijs is een recht voor iedereen, Ontwikkelingssamenwerking en basic education: beleid, ervaringen en uitvoering*. English translation 2000, Education: a basic human right. Development cooperation and basic education: policy, practice and implementation.

⁶⁴ Response to motion Hessing in 2001 (TK 28 000V nr 32). Since 2008, the 15% applies to the whole education sector, no longer focusing exclusively on basic education.

⁶⁵ This motion was explicitly mentioned with regard to the funding for the POMA in 2004.

⁶⁶ In principle the EKN is responsible for managing the Dutch education programme in Bolivia. However, the project 'Education for Indigenous Girls' (Niña Indígena) by UNICEF Bolivia (see section 3.3) forms part of a broader international programme of UNICEF supported by the Netherlands. It was therefore initiated and financed by the Ministry of Foreign Affairs (DSO/OO) in the Netherlands rather than the EKN. EKN undertakes the monitoring of the project.

⁶⁷ DGIS (2000), Sectoral approach. Working Document.

⁶⁸ According to the Dutch policy on education "the aim is to work with governments and other donors towards sectoral support through budget support for the entire sector, a sub-sector or specific budget headings, or – where cooperation with other donors is not yet possible – through bilateral support". Ministry of Foreign Affairs (2000), Education: a basic human right. Development cooperation and basic education: policy, practice and implementation.

with some initial doubts about the capacity of government to deal with direct financing.⁶⁹ However, Bolivia participated in the Comprehensive Development Framework (CDF) by the World Bank in 1999, and in 2000 a Poverty Reduction Strategy Paper (PRSP) was endorsed by the World Bank and International Monetary Fund (IMF) that resulted in the Bolivia's meeting of the Heavily Indebted Poor Countries (HIPC II) Completion Point requirements. Together, these events reflected the international confidence in the Bolivian government, and opened the way for intensification of Dutch sector support to the ME in Bolivia. As will be discussed in the following chapter, since then the support by the Netherlands has been very similar to sector budget support, despite the fact that several conditions for such support, among which public financial management, are not fulfilled.

3.2 Objectives of Embassy's education programme

In short, the overall objective of the Netherlands was improvement in the quality and equity of the education sector. In all annual sector plans of the EKN the need to improve educational quality is mentioned as a main objective, to be achieved through, among others, the development of management capacity of the national education system, teacher training, consolidating and generalising the transformation of the curriculum and promoting citizen's participation.⁷⁰

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According to the Embassy's policy documents, emancipation and inclusion of indigenous groups is another objective of the Dutch education programme in Bolivia. Nowadays this might seem a mainstream issue in Bolivian government, but this has not always been the case. The Netherlands has supported the CEPOs,⁷¹ which have grown to become one of the main channels of participation in the education sector furthering the interests of previously disadvantaged indigenous population groups (also see section 3.3). Closely related is the attention of the EKN to the limited progress with regard to rolling-out intercultural and bilingual education, which reappears as a concern in almost every policy plan and track record up to date.

The sector-wide approach, advocated by the Netherlands, requires a national education strategy that is truly sector-wide, covering all levels of education (initial, primary, secondary, higher and alternative and technical education). The *Reforma* concentrated solely on primary education. In 2004, the POMA did include all these levels of education, although completion of primary education was still seen as one of the main priorities.⁷² In this context, the

⁶⁹ EKN La Paz (1998), Jaarplan; Described in: IOB (2005), IOB Evaluation Sector-wide approach. Working document Bolivia.

⁷⁰ EKN La Paz (2001), Aantekening Sector Onderwijs, 12.04.2001; EKN La Paz (2005), Medium-Term Plan 2005-2008; EKN La Paz (no date), Memorandum de Valoración Programa de Reforma Educativa; EKN La Paz (no date), Sector Track Record Education Bolivia 2009.

⁷¹ See for example: EKN La Paz (1999), Memorandum verslag dienstreis Bolivia; EKN La Paz (no date), Jaarplan 2004 EKN La Paz; EKN La Paz (2005), Medium-Term Plan 2005-2008.

⁷² As noted by the Embassy. See for example: EKN La Paz (2001), Aantekening Sector Onderwijs, 12.04.2001; EKN La Paz (2004), BEMO Apoyo al Plan Operativo Multianual de Educación; EKN La Paz (2005), Medium-Term Plan 2005-2008; EKN La Paz (no date), Sector Track Record Education Bolivia 2009.

attention of the Embassy to TVET, or ‘*educación productiva*’, since 1998 has been important. In 2004, TVET was included in the POMA, and in the most recent Strategic Plan of Education 2010-2014 (PEI) it is considered as a main priority. The input of the EKN has certainly played a role in the development of the Bolivian policy on TVET, evidenced for example by the cooperation of government with FAUTAPO, an NGO focused on TVET, supported by the Netherlands (more on this in section 3.3).⁷³

The policy documents of the Embassy mention two transversal themes for the EKN as a whole that are also applied to the education programme: decentralisation and gender.⁷⁴ The importance of decentralisation for the education sector in Bolivia was pointed out as early as 1999-2001, when Dutch policies mentioned it as a way of strengthening institutional capacity in the sector.⁷⁵ Late 2009, the Embassy commissioned a report on the status of decentralisation in the education sector and possible ways in which the EKN could play a role in this process.⁷⁶ Though at national level gender parity was achieved with regard to access to education, The Netherlands continued to stress gender equity in rural areas and post-primary education.⁷⁷ For example, the Embassy promoted gender sensitivity in their NGO support, such as FAUTAPO.⁷⁸ Due to the nature of the support to the government programme, in which the donors acted within the basket without earmarking of specific themes, gender was less explicitly addressed in the Embassy’s education programme after the Dutch technical assistance on gender and environment to the Ministry ended in 2000. However, recently the Netherlands has taken the lead in the joint donor-government working group on equity and opportunities, which covers gender.

⁷³ TVET falls outside the scope of the current evaluation, so the influence of the Netherlands on TVET in Bolivia has not been assessed. However, there is evidence of the influence of FAUTAPO on national TVET policy, e.g. the certification system for competencies acquired on the job used by the ME and the Ministry of Labour was initially developed by FAUTAPO (confirmed by interviews).

⁷⁴ From 1997 until 2008 environment was also a transversal theme of the EKN, but apart from technical assistance to the ME in the 1990s, this has not been pursued in the education programme.

⁷⁵ EKN La Paz (1999), Memorandum verslag dienstreis Bolivia; EKN La Paz (2001), Aantekening Sector Onderwijs, 12.04.2001.

⁷⁶ EKN La Paz (2010), Bases para una estrategia de enfoque descentralizado de la cooperación al sector de la educación en Bolivia (Propuesta del Programa transversal de Descentralización y MIL, La Paz 22.03.2010).

⁷⁷ The education advisor in the Embassy is also a gender specialist, who has previously been active in this area as technical assistant to the ME. EKN La Paz (no date), Resultatenrapportage 2005-2006: Onderwijs Bolivia; EKN La Paz (no date), Midterm Review Emancipatie Januari 2008-April 2010.

⁷⁸ EKN La Paz (2007), BEMO FAUTAPO 2007 – 2010.

In general, the objectives of the Dutch support to the basic education sector in Bolivia have been compatible with the main Bolivian policy documents, applicable to the education sector during the past ten years, such as the *Reforma Educativa*, the ME's strategic plan 1999-2002, the POMA, and since 2006 with the PND, the new Bolivian Constitution and the Law 'Avelino Siñani - Elizardo Pérez'. For example, the PND supports the Millennium Development Goals and is even more ambitious in certain areas. However, the compatibility of Dutch support with the Bolivian policies did require some liveness in interpretation of key policy documents. Both the objectives of the *Reforma*, focusing on primary education, and the subsequent POMA, covering more of the sector, were fully endorsed by the Netherlands. In 2006, with the change of government, the POMA was rejected without a replacing sector strategy, but the basket members, including the Netherlands, continued its support based on annual plans for projects.

3.3 Portfolio

Over the past 10 years, the EKN has used two main instruments: 1) sector support to the ME, and 2) support to international and national NGOs, and research. In line with the policy of the Embassy as a whole, the largest part of the programme concentrates on government funding. The support to NGOs can be considered complementary to the support to government. On the one hand, there are several projects that back up the support to government (e.g. by providing support for entities with participation in the education sector). On the other hand, other projects, implemented by local and international NGOs, are funded because they tackle problems that are not sufficiently covered in the government's education programme (e.g. TVET).

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The following table presents an overview of the education portfolio of the Netherlands in Bolivia, amounting to over EUR 101 million between 2001 and 2009.⁷⁹

⁷⁹ The support to education amounted to almost 40% of the expenditure by the Netherlands in Bolivia according to the project administration system (Piramide) of the Ministry of Foreign Affairs.

Table 3.2 Overview of instruments, modalities and activities used in Bolivia ⁸⁰				
Instrument	Type	Project	Time period	Budget in EUR
Support to ME	Co-financing with the WB	Support to the <i>Reforma Educativa</i> (3 projects)	09/2001-12/2005	21.437.993
	Direct bilateral support / basket	Support to the Multiannual Operational Plan (POMA)	01/2004-12/2012 ⁸¹	47.059.911
Support to NGOs and research	Projects flanking sector support	Education Forums	09/2001-12/2004	130.000
		Indigenous Fund	07/2002-03/2003	14.606
		Indigenous People's Education Councils (CEPO)	06/2002-09/2006	1.435.184
	Support to research	Bolivian Strategic Investigation Programme (PIEB), (2 projects)	01/2000- 10/2015 ⁸³	9.086.098
	Support to NGOs/ Multilaterals	Plan International	12/2007-09/2012	1.082.023
		UNICEF – Alphabetization	08/2001-12/2004	738.689
		UNICEF – Indigenous girls ⁸⁴	01/2006-12-2010	4.167.305
		FAUTAPO (3 projects)	01/2005-04/2011	16.176.595
Total portfolio 2001-2009				101.328.404

Source: Based on the project administration system (*Piramide*) of the Ministry of Foreign Affairs, The Netherlands, as well as project files of the EKN.

Besides through the education programme of the Embassy, the Netherlands has also been active in the education sector in Bolivia through a number of Dutch NGOs that are co-financed by the Dutch Ministry of foreign affairs.⁸⁴ This particular component of Dutch support to basic education in Bolivia falls outside the scope of the current evaluation.

⁸⁰ This does not include the indirect support of the Netherlands to the education sector in Bolivia through core funding for multilateral organisations or through co-financing of Dutch NGOs (see below). For those projects that are still being executed after 2009, the disbursements until December 2009 are given. All other amounts refer to total project budget.

⁸¹ Due to administrative reasons the closure of this programme was delayed.

⁸² The funding for PIEB was funded directly by the Ministry of Foreign Affairs in the Netherlands since 1995. After two phases of funding, the project was taken over by the Embassy in 2006.

⁸³ Funded through central funds of the Ministry of Foreign Affairs in the Netherlands.

⁸⁴ For example, in 2008-2009 the Dutch NGOs Cordaid, ICCO, Terre des Hommes, Oxfam Novib and Hivos were executing education programmes in Bolivia, subsidised through the co-financing arrangement (MFS, Medefinancieringsstelsel). The Netherlands Development Organisation (SNV) is also active in Bolivia and co-financed by the Ministry of Foreign Affairs through a different arrangement.

Support to the government (ME)

Of the budget of the Embassy 68 % is directed at government programmes (as part of alignment objectives), though this varies depending on the political situation (e.g. less in 2007).⁸⁵ The support to government has developed from joint co-financing with the World Bank, to bilateral direct sector support to the ME and finally support to the ME through a basket fund. Four, slightly overlapping, phases can be identified (whereby the final phase falls outside the scope of this evaluation):

- 2001-2004, where the *Reforma* was supported through direct funding;⁸⁶
- 2004-2006, when basket funding was provided for the sector-wide POMA;
- 2006-2010, with basket funding on the basis of annual plans (in the absence of a new education strategy);
- 2011-2014, where the Netherlands has committed to continue basket funding for the new education strategy (PEI).

In the funding proposals and financing agreements with the Ministry of Education, the Netherlands did identify programmes and activities for funding, with varying degrees of specificity. For example, in 2001 the Dutch contribution was distributed among seven broad categories (e.g. capacity strengthening, curriculum development).⁸⁷ In 2003, an unsettled year in Bolivia and the Ministry, less flexibility was allowed and funding was restricted to pre-defined areas with specific targets (e.g. 4.381 school directors trained in curriculum matters).⁸⁸

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However, in execution, the support to the *Reforma* and the POMA was provided by the Netherlands with considerably more flexibility of spending within broad, indicative budget lines of the initial strategic plans.⁸⁹ For example, with regard to the POMA, the basket as a whole specified areas for funding (e.g. infrastructure for rural technical schools), but the Netherlands was of the opinion, as expressed in the project proposal, that no further earmarking was required because the priorities of the POMA fitted with the priorities of the donors.⁹⁰ This flexibility was further expanded by the limited monitoring of the results for the pre-identified areas by the Netherlands. As will be discussed in the next chapter, during

⁸⁵ EKN La Paz (2008), *Meerjarig Strategisch Plan*.

⁸⁶ This consists of three separately funded programmes: direct support during 2001-2003 for the ME's strategic plan 1999-2002; extra funding in 2002 for pedagogical advisors; additional support in 2003 to finalise the strategic objectives of the Ministry's Strategic Plan 1999-2002 and to prepare the next strategic plan for 2004-2008. Source: EKN La Paz (2003), *BEMO Apoyo Financiero a la Reforma Educativa de Bolivia*, EKN La Paz (2004), *Caratula del documento final Salarios Asesores Pedagógicos*

⁸⁷ In total, 9.7 million euro was divided among Education networks (14%), Decentralisation of management to municipal/district level (15%), Strengthening capacity Ministry (9%), Information, planning and evaluation system (11%), Teacher training - among others with regard to bilingual education (29%), Curriculum development (19%) and Information campaign about Reforma (2%). EKN La Paz (2001), *Memorandum de Valoración Programa de Reforma Educativa*

⁸⁸ EKN La Paz (2003), *BEMO Apoyo Financiero a la Reforma Educativa de Bolivia*.

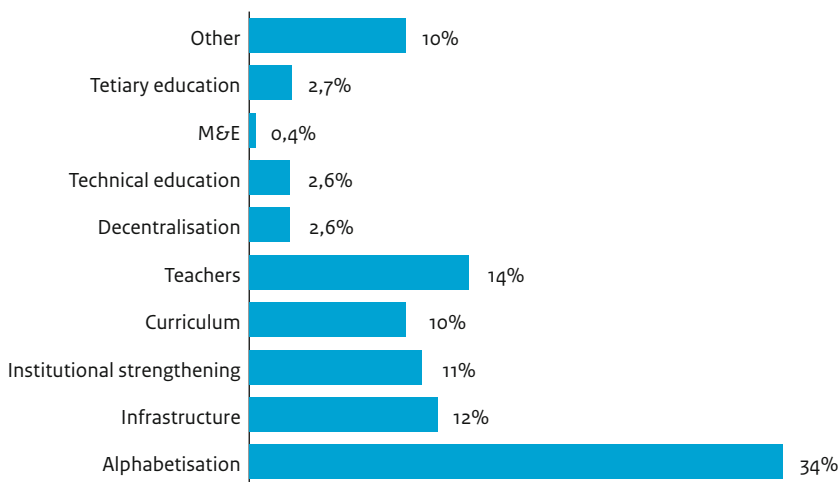
⁸⁹ With regard to the Reforma, see financing agreement 29 Nov 2001 (but a different distribution in EKN La Paz (2001), *Memorandum de Valoración Programa de Reforma Educativa*). As long as it was according to the Strategic Plan 1999-2002, the funds could be used flexibly. Only in case the funds were to be used for other budget items, this would have to be discussed beforehand with the Embassy for approval (except for the institutional strengthening component).

⁹⁰ EKN La Paz (2004), *BEMO Apoyo al Plan Operativo Multianual de Educación*.

the evaluation period monitoring focused on financial inputs and execution rather than results (with regard to pre-defined targets or otherwise).

Effectively, the majority of the direct funding by the Netherlands through the basket fund was spent by the ME at national level, and in particular on its investment programme (see table 5.7). The following chart shows the broad expenditure categories that are included in the investment budget to which the basket has contributed between 2004 and 2009.⁹¹ The programmes consist of, for example, the development and implementation of the curriculum, the education information and management system, but also include technical consultants working on these key issues. However, it is important to note that the Netherlands itself did not earmark its funding to these categories, in accordance with the sectoral approach to funding.

Figure 3.1 Investment expenditure Ministry of Education, 2004-2009



Source: Own calculations on the basis of data received from VIPFE (SISIN).

Institutional strengthening

The education programme of the Netherlands consisted for 68 % of support to the ME. Combined with increasingly un-earmarked funding and promotion of the Ministry’s leadership, this assumes considerable institutional capacity of the ME. An analysis of the funding proposals and related documents shows that there were nevertheless serious

⁹¹ Note that in Bolivia investment expenditure includes expenditure on capital as well as human resources, utilized to enhance the country’s capacity to deliver services and produce goods. See the definition of ‘inversión pública’ in Ministeria de Hacienda (2003) Sistema Nacional de Inversión Pública. Normas básica.

concerns about the capacity during the evaluation period.⁹² This is not surprisingly given the political volatility during that period, with frequent changes in the management and staff of the ME. However, on the other hand, the EKN has expressed more confidence in the capacity of the ME to implement education policies in the specific context of Bolivia than many other donors.⁹³

Institutional strengthening of the Ministry was one of the programmes supported by the basket (11 %, see figure 3.1). In addition, the capacity of the ME was addressed through a government-wide reform programme: Institutional Reform Project (PRI), which was supported by the EKN since 1999. Though not part of the EKN's education programme, the ME was encouraged to comply with these reforms. Unfortunately, the Institutional Reform Project was not completed, neither in the ME, nor in the Bolivian government as a whole, and ended unsuccessfully in 2005 before its planned completion date in 2007.⁹⁴

Apart from those initiatives, the Netherlands invested in two operational audit consultancies, which were also used as part of the programme appraisal procedures.⁹⁵ These analyses, conducted in 2005 and 2009, provide evidence of limited progress, which needs to be considered within the above-described context of political turmoil in the ME. Improvements have been made to the financial management and auditing systems, in line with the overall government systems, and with the education information systems. Nevertheless, in other areas the same concerns are raised in 2009 as in 2005. For example, the assessments stress the urgent need for a human resource policy that is more sustainable than the current practice.⁹⁶

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One of the issues that are repeated time and again, also in assessments made by the Embassy, is the use of 'fixed term' consultants (the so-called *consultores de línea*). These are funded through external resources rather than domestic resources, for crucial positions in the ME. It has been noted that this is not only an issue in the ME, but also exists in the Bolivian government as a whole.⁹⁷ However, it appears to be a larger problem in the education sector, where

⁹² See, for example: EKN La Paz (2005), *Medium-Term Plan 2005-2008*; EKN La Paz (2008), *MJSP 2008-2011 La Paz*. For critical notes from within the EKN, *Memo SBM-OS to TD/EDU*, 14/06/2004 and most recently EKN La Paz, (2010), *Hacia un Nuevo apoyo de la Embajada a la educación en Bolivia*. Confirmed by interviews EKN.

⁹³ Confirmed by interviews with EKN and other donors, and analysis of EKN documents. For a more critical analysis by another donor, see for example: *Ministry of Education of Bolivia & Ministry of Foreign Affairs of Denmark/DANIDA (2005), Danish support to Education in Bolivia through the sector wide approach, 2005-2009, La Paz*.

⁹⁴ According to the World Bank's assessment of the programme: 'outcomes were moderately unsatisfactory'. With regard to the lessons learned the assessment adds: 'a political economic analysis of reforms was not undertaken as part of the project's design, affecting project implementation. ... This strategy collapsed with the change of government. ... Positive results in Civil Service Reform should be expanded across all levels of governments and enhanced with the implementation of policies for a merit-based promotion system and a new structure of salaries.' Project ID: Po62790. www.worldbank.org

⁹⁵ *Reingeniería Total SRL (2005), Ministerio de Educación: diagnóstico de fortalezas y debilidad del área administrativa y financiera. Informe de diagnóstico*; and *TUDELA & TH Consulting Group S.R.L. (2009), Informe de Consultoría de evaluación de Capacidad Institucional, Ministerio de Educación*.

⁹⁶ Confirmed by interviews.

⁹⁷ Interview EKN.

the ME has been able to expand its workforce with less qualified personnel using domestic resources, benefiting from extensive basket funding for hiring technical staff (on investment budget for the ME's programmes).⁹⁸

However, the effectiveness of the efforts to improve the institutional capacity of the ME has been limited. The progress indicators for the support to ME through the basket did not allow close monitoring of the issues raised in the operational audit reports.⁹⁹ Nor was the implementation of the reforms effectively followed up, e.g. used as a condition for further support.¹⁰⁰ For example, aspects of civil service reforms in the ME were included as conditionality since the funding of the *Reforma* (threshold of 120 consultants to be funded through the basket), but with no repercussions, nor results.¹⁰¹ The amount of consultants has been crossed in the past few years.¹⁰²

Support to NGOs and research

The support to the ME is backed by part of the Embassy's support to NGOs, often focusing on increased participation of civil society in education policy development. For example, at the start of this millennium the Netherlands supported the organisation of 'Education Forums' during which the national education agenda was discussed with representatives of political parties, civil society organizations and (inter)national NGOs.¹⁰³ Financial assistance was also provided for aligning the demands and action plans of three different indigenous funds who were participating in the preparations for the Law of National Advisory Council for indigenous peoples of Bolivia (*Ley del Consejo consultivo nacional de los pueblos indígenas de Bolivia*).¹⁰⁴ Furthermore, the Netherlands funded the Indigenous People's Education Councils in order to improve their capacity to participate actively in the formulation; application and supervision of education policies within the *Reforma* and the POMA (see more on CEPOs in Chapter 5.1).¹⁰⁵

Secondly, the Embassy directly funds two programmes executed by international NGOs: Plan International and UNICEF. These projects fit within the broader objectives of the Dutch education

⁹⁸ As mentioned in the capacity assessments of the ME and confirmed through analysis of data from the Vice Ministry Public Investment and External Financing (VIPFE).

⁹⁹ Ministerio de Educación, *Matriz de Indicadores del Programa Operativo Multianual 2004-2008*: '1.15 Fortalecer la capacidad gerencial del Ministerio de Educación'.

¹⁰⁰ For example, the 2005 report includes a monitoring plan with 58 objectives. Reingeniería Total SRL (2005), Ministerio de Educación: diagnóstico de fortalezas y debilidad del área administrativa y financiera. Informe de diagnóstico

¹⁰¹ See for example in the Financing agreement for the POMA. EKN La Paz (2004), *Acuerdo Bilateral entre la ministra de cooperación de los países bajos y el Gobierno de Bolivia*, June 18, 2004

¹⁰² Based on data from the Dirección General de Asuntos Administrativos of the ME, and confirmed by interviews.

¹⁰³ EKN La Paz (2001), *Memorandum de Valoración Análisis y formulación de propuestas de políticas educativas con participación social*.

¹⁰⁴ EKN La Paz (2002), *Memorandum de Valoración SOF EDU-Fondo Indígena*.

¹⁰⁵ Between 2002 and 2006, the EKN had a separate project in its portfolio for supporting the CEPOs. However, in 2006 the CEPOs have requested the Fundación AUTAPO to take on their administration and technical assistance. Therefore, the CEPOs have become part of the FAUTAPO projects since 2006 (see below for more information). Source: EKN La Paz (2002), *Memorandum de Valoración Apoyo al Plan Estratégico de los CEPOs*; EKN La Paz (2006); *Memorandum Solicitud de Decisión FAUTAPO Cambio de presupuesto 2006*.

programme in Bolivia and are implemented in cooperation with the Bolivian government (including decentralised levels). The programme executed by Plan International focuses on the quality of education (e.g. through the implementation of an improved curriculum, cooperation with municipalities and interventions at the school level).¹⁰⁶ The main project with UNICEF¹⁰⁷ focuses on gender equity by developing strategies to improve access, retention and return to school of indigenous girls.¹⁰⁸

The largest project consists of the support by the EKN to a local NGO called FAUTAPO, which is active in both the education and the productive sector. FAUTAPO originated as a project of the Embassy and the ME to assist two universities in Tarija and Potosí departments in 1998.¹⁰⁹ In 2005, the project AUTAPO was converted into a foundation called FAUTAPO, *Fundación Educación para el Desarrollo* (Education for Development Foundation) (see box 3.1).

And last but not least, the Embassy has also provided financial support to the Bolivian academic research institute Programme of Strategic Research in Bolivia (PIEB). The objective of this support was to strengthen independent research capacities and to promote research-oriented education.¹¹⁰ Moreover, the Embassy has funded the publication of various studies on the education sector in Bolivia, which is important given the limited attention to evaluating the quality of education by the government (as will be discussed in chapter 6).¹¹¹

The Embassy has set up a working group, the '*Mesa de Trabajo en Educación*', to enhance the coordination and complementarities between different organisations working with the Netherlands in the education sector in Bolivia.¹¹² This includes some of the Dutch NGOs active in the education sector in Bolivia, such as Terre des Hommes and SNV, an international NGO supported by the Netherlands (Plan International), as well as Bolivian NGOs, e.g. Bolivian Centre for Investigation and Educative Action (*Centro Boliviano de Investigación y Acción Educativa*, CEBIAE), FAUTAPO, National Coordination

¹⁰⁶ EKN La Paz (2007), BEMO Plan Internacional 2008-2011.

¹⁰⁷ Another project of UNICEF co-funded by the EKN, but beyond the scope of this evaluation, aims at decreasing absolute and functional illiteracy in the departments of Chuquisaca and Potosí, mainly among indigenous women aged 15-45. EKN La Paz (2001), Memorandum de Valoración Apoyo adicional al proyecto de alfabetización UNICEF.

¹⁰⁸ EKN La Paz (2006), Memorandum ter beslissing Voorstel Onderwijsproject Bolivia van Unicef Nederland; Unicef Bolivia (2009), Final Fund Utilization Report for the Netherlands Committee for Unicef.

¹⁰⁹ Hence, its name: 'Apoyo a las Universidades de Tarija y Potosí' (Assistance to the Universities of Tarija and Potosí, AUTAPO). Source: Fundación FAUTAPO (2010), Memoria Anual 2009.

¹¹⁰ The initial project ran until 2010, but a second project (with slightly altered objectives) was already started late 2009. EKN La Paz (2006), Memorandum de Valoración Programa de Investigación Estratégica en Bolivia - PIEB; EKN La Paz (2009), Activity appraisal document PIEB. EKN La Paz (2009), Acuerdo de Contribución Programa: 'Plan Estratégico Quinquenal 2010-2014' - PIEB.

¹¹¹ For example, Saavedra (2007), Educación superior, interculturalidad y descolonización; Contreras, M.E. y M. L. Talavera (2004), Examen parcial. La reforma educativa boliviana 1992-2002; Barriga, P. M. et al. (2004), Leer y escribir en quechua... ¿Es necesario? Un estudio en tres Unidades Educativas de Chuquisaca; Talavera et al. (1999), Otras voces, otros maestros. Aproximación a los procesos de innovación y resistencia en tres escuelas del Programa de la Reforma Educativa.

¹¹² The evaluation of external assistance to the education sector in Bolivia of 2003 recommended developing stronger links between donors and civil society. Source: IOB (2003), Local Solutions to Global Challenges; Joint Evaluation of External Support to Basic Education in Developing Countries. Case study Bolivia.

Committee of the Indigenous People's Education Councils (*Comité Nacional de Coordinación de los Consejos Educativos de Pueblos Originarios, CNC-CEPOs*). The *Mesa* has also published several books, e.g. on education quality and decentralisation in the education sector.¹¹³

Box 3.1 *Productive education – FAUTAPO*

FAUTAPO aims to contribute to TVET in Bolivia through innovating education processes that develop skills which enable people to optimize their performance; the articulation of complex production processes; and the development of management information systems, supporting government policies for relevant and productive education for all.¹¹⁵ In order to achieve this, FAUTAPO cooperates with a larger number of counterparts, such as producers, municipal governments, teaching centres Training Institutes (ICAPs) and Centres for Alternative Education (CEAs) and several Bolivian universities. FAUTAPO receives financial support from the EKN and other donors, among which the Swedish Embassy, DANIDA and the Swiss Agency for Development and Cooperation (SDC).

FAUTAPO is active in three different areas with support from the Netherlands: Education, Production and Institutional Strengthening. Within the area of education, FAUTAPO offers a wide variety of courses on technical and productive education, for pupils who completed secondary school but who cannot find a job, for youngster who are about to finish their military service, and for persons who, for any number of reasons, lack formal education.¹¹⁶ Through communication with local authorities, with local entrepreneurs and with universities, FAUTAPO aims at fine-tuning the supply of its courses to local demand for labour. In the area of institutional strengthening, FAUTAPO implements various programmes, including support to popular participation in education by means of the CEPOs.¹¹⁷ Since 2006, FAUTAPO has also been implementing programmes in the productive area, by offering capacity training to producers of *quinua* (Andean grain), grapes, wines and *singani* (local liquor). Through these trainings, producers are expected to increase their production, leading to a higher standard of living.¹¹⁸ FAUTAPO has developed a gender strategy both at the institutional and the course level, promoting women to participate (e.g. single mothers through the provision of day care for children). Women are also stimulated to participate in courses like construction, woodcarving and technical professions.¹¹⁹

¹¹³ Yapu, M. (2009), *La calidad de la educación en Bolivia. Tendencias y puntos de vista*; and Nina, O. (2006), *La educación Inicial, Primaria y Secundaria en el marco de la descentralización: Contexto y perspectivas*.

¹¹⁴ Fundación FAUTAPO (2010), *Memoria Anual 2009*; EKN La Paz (2006), *Acuerdo de Contribución entre La ministra de Cooperación de los Países Bajos y La Fundación AUTAPO*; EKN La Paz (2006), *BEMO FAUTAPO 2007 – 2010*.

¹¹⁵ Fundación FAUTAPO (2010), *Memoria Anual 2009*.

¹¹⁶ *Ibid.*

¹¹⁷ EKN La Paz (2007), *BEMO FAUTAPO 2007 – 2010*.

¹¹⁸ Dam, A. van (2011), *Technical education in Bolivia. The case of Fautapo*. Presentation given on 03/02/2011.

Since FAUTAPO started offering its courses in the field of technical and vocational training in 2005, over 20.000 students (of which 55 % female) have participated in its educational programme through more than 750 different courses.¹²⁰ According to the EKN, the average costs per student for the FAUTAPO programme are estimated at about USD 777 for an eight-month period.¹²¹ This includes payments to the learning centres for didactical materials, classrooms and salaries for instructors; insurance; financial support for food and transport for the students (about USD 1 per day); and the costs of the three-month technical internship.¹²²

Generally speaking, the results achieved by the various education programmes of FAUTAPO are valued as positive and successful, not only by FAUTAPO itself and the EKN, but also by external evaluators.¹²³ According to FAUTAPO's own monitoring scheme, 80 % of its former students find a job in the field where he or she was trained in, or establishes their own business, after having followed a TVET-course.¹²⁴ The Foundation's efficiency is appreciated by the EKN that notes that FAUTAPO has made 'a real impact that normally is only seen in longer time lapses'.¹²⁵ This corresponds with the midterm evaluation in 2006, which concluded that FAUTAPO managed to position itself firmly within the national education sector and through its various programmes and projects taken on a leading role in the field of TVET.¹²⁶

Unfortunately, despite external evaluations of FAUTAPO, there is to date no more evidence of the effects of the training and impact on lives of pupils in the longer term. Such information is important not only for FAUTAPO and the EKN, but even more so for policy development in this area by the Bolivian government. Hopefully, FAUTAPO's recent attention to improving its M&E systems will generate useful information in the near future about the effects and replicability of their work.¹²⁷

¹¹⁹ Fundación FAUTAPO (2010), Fichas de programa de Educación Técnica Productiva (ETP) – Ejército, Tarija y Potosí; Formación Técnica Laboral para Jóvenes Bachilleres; Educación Superior.

¹²⁰ This compares well with similar programmes in other Latin American countries (over USD 1.000,- for 6 months) and by the Bolivian government. EKN La Paz (2006), Memorandum Solicitud de decision Financiamiento de formación Técnica Laboral – FAUTAPO.

¹²¹ EKN La Paz (2006), Memorándum Solicitud de decisión Financiamiento de formación Técnica Laboral – FAUTAPO.

¹²² An external evaluation was conducted in 2010. Unfortunately, this evaluation focused on processes and activities rather than on results. Source: Wit, C. de et al. (2010), Fundación Educación para el Desarrollo. Evaluación de medio término.

¹²³ Fundación FAUTAPO (2010), Memoria Anual 2009; Fundación FAUTAPO (2010), Fichas de programa Formación Técnica Laboral para Jóvenes Bachilleres; confirmed by interviews.

¹²⁴ EKN La Paz (2007), BEMO FAUTAPO 2007 – 2010.

¹²⁵ Chumacero, C. et al. (2006), Evaluación de Medio Término a la Fundación FAUTAPO; EKN La Paz (2007), BEMO FAUTAPO 2007 – 2010.

¹²⁶ The current practice of collecting testimonies and life stories of students by FAUTAPO is informative but insufficient for evaluating the impact of the programme. This requires a longer term evaluation, comparing and following students over time. Such research would also be informative given the current global interest in TVET.

3.4 Conclusions

The Netherlands has been a major donor in the education sector in Bolivia during the evaluation period, enabled by:

1. Prioritising of basic education by the Netherlands, including the availability of sizable amounts of funds.
2. Delegated decision making by the embassies of the Netherlands, in combination with a large and specialised education team in La Paz.
3. Strong Netherlands commitment to the sector-wide approach, allowing longer term cooperation with the Bolivian government in the form of basket support, despite the conditions for sector budget support not being fulfilled.

The Netherlands has been appreciated as a stable and continuous partner of the Ministry of Education and several non-governmental actors in the education sector in Bolivia. The objectives of the education programme of the EKN in Bolivia are a combination of Dutch and Bolivian education policy objectives. The Netherlands was particularly interested in quality, equity (girls and indigenous populations) and relevance of basic education, in line with the Dutch Ministry of Foreign Affairs' objectives for basic education. The Netherlands supported consecutive policies and strategies of the ME in Bolivia, though these have varied in strength over the evaluation period. At the same time, the education programme of the EKN addressed gaps in the sector strategies through support to NGOs and research (e.g. attention to TVET). This two-tiered approach was in line with the overall policy of the Embassy and a logical choice in a politically instable country as Bolivia.

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However, as the bulk of the funding, 68 % is channelled to the Ministry of Education, the evaluation has focused on this support. The analysis of the project proposals for the government funding in the past ten years paints a picture of considerable flexibility in use of funds from the Netherlands. There was limited earmarking of specific programmes for funding, which implies confidence in the capacity of the ME to develop and implement education sector reforms and policies. Nevertheless, this capacity has been a cause of concern throughout the evaluation period, for the Netherlands and for some other donors even more so.

Through the basket, institutional strengthening of the ME has been funded directly (11 % of basket funding). In addition, the Netherlands invested in two operational audits of the ME's capacity in 2005 and in 2009. These audits point out important improvements (e.g. with regard to budgetary systems) but also repeat concerns about continuing weaknesses (e.g. human resource policy).

The concerns about the ME's capacity, combined with considerable flexibility of funding during some very volatile political times with many changes in the ME, necessitates more effective monitoring by the basket as a whole, including the Netherlands. Relevant progress indicators, linked to stringent follow up of institutional assessments, are required to ensure investments by the Netherlands (and other donors) lead to sustainable improvements in the ME's capacity and subsequent results in the education sector.

4

Aid delivery

In this evaluation, efficiency is measured by the way in which the Dutch support is provided, in particular the implementation of principles of the Paris Declaration in the support to the government (about 68 % of the education programme of EKN).¹²⁷ Therefore, this chapter starts with an assessment of the progress made with regard to alignment, ownership, donor coordination and harmonisation. It also includes a section on the way in which the Netherlands has monitored and evaluated its support to government.

4.1 Implementation of Paris Principles

From the start of the *Reforma* in 1995, the Netherlands provided support to the ME in Bolivia, initially through a co-financing arrangement with the World Bank. Since 2001 and throughout the evaluation period, the Netherlands has provided direct support to the Ministry. The co-financing arrangement was abandoned due to differences in opinion about alignment with domestic budget processes and procedures.¹²⁸ As a next big step, the Netherlands moved to the provision of basket funding in 2004, as part of the Education Sector Support Fund (FASE), often called '*Fondo Canasta*'). The 2004-2008 POMA was the sector-wide education strategy for which the support was initially provided. In 2005, Denmark and Sweden joined the basket, in 2008 Spain and in 2011 UNFPA will join.¹²⁹

In 2008, the Embassy expressed the idea of moving into a silent partnership.¹³⁰ However, lack of capacity of other donors and an explicit request of the ME and Bolivian government, as well as other donors, has led the Netherlands to continue its education programme as one of the main donors (financially and through active role in coordination).¹³¹

Ownership

A comparison of the assessments of aid delivery made in 2003 ('Local solutions and global challenges')¹³² and in 2005 (IOB 'Working Paper SWAp'),¹³³ with the present situation shows a

¹²⁷ The principles of the Paris Declaration are ownership, alignment, harmonisation, managing for results and mutual accountability. Paris Declaration on Aid Effectiveness (2005) and, Accra Agenda for Action (2008). <http://www.oecd.org/dataoecd/11/41/34428351.pdf>.

¹²⁸ Interviews and OECD/DAC (2002), Bolivia, a country case on government efforts to achieve more ownership.

¹²⁹ For a more elaborate description, see Arce, M. B. (2009), Evaluación cualitativa de algunos mecanismos, instrumentos y modalidades de financiamiento de la ayuda oficial al Desarrollo de Bolivia; and IOB (2003), Local Solutions to Global Challenges; Joint Evaluation of External Support to Basic Education in Developing Countries. Case study Bolivia.

¹³⁰ Discussed in multiannual plan of the Embassy 2008-2010. A Silent Partnership is: 'an arrangement between two or more like-minded funding agencies which allows one or more partners to channel a financial contribution to the education sector of a country with which they do not have a bilateral relationship, through a partner which is active in that country and in the sector. Source: Ministry of Foreign Affairs (2002), Policy paper on Silent Partnership.

¹³¹ EKN La Paz (2008), Jaarplan 2008; EKN La Paz (2009), Jaarplan 2009; EKN La Paz (2010), Future role of the Netherlands Embassy La Paz in the education sector.

¹³² IOB (2003), Local Solutions to Global Challenges; Joint Evaluation of External Support to Basic Education in Developing Countries. Case study Bolivia.

¹³³ IOB (2005), IOB Evaluation Sector-wide approach. Working document Bolivia.

gradual progress in the leadership of the Ministry. The ME has been able to convince several non-basket donors to apply as much as possible the principles of the Paris Agenda, better align their aid to Bolivian procedures, coordinate more (with the Ministry) and abolish a number of special project implementation units.¹³⁴ In 2008, the ME took a step forward in the realisation of the Paris Agenda with the start of a mutual evaluation process with the donors, aiming at more transparency in donor procedures and practices and more predictability in future aid flows. Donors have filled in a questionnaire indicating their position towards the issues of the Paris Agenda, which applies as a baseline for measuring results in this area in a few years' time.¹³⁵ Moreover, the ME plays a leading role in the donor coordination (see below), which has been strongly endorsed by the Netherlands.

However, it is important to note that ownership of education reforms by the ME at the national level, the counterpart of the donors, is not immediately matched by ownership at subnational government levels or ownership by key stakeholders of civil society (as will be discussed in section 5.1).

Alignment and harmonisation

Though already in 2003 it was noted that most project donors managed to adopt their rules and procedures to a certain degree to the Bolivian system, there was still considerable scope for improvements in harmonisation of administrative and operational requirements, as well as improved dialogue between different kinds of donors.¹³⁶ In 2005, the IOB evaluation of the sector-wide approach noted again that: 'In the perception of the Embassy only few donors are genuinely prepared to coordinate donor support and to harmonise procedures'. IOB's conclusion in 2005, not exclusively for the education sector, was that though some progress has been made in the Paris Agenda, overall progress would depend on the agenda of the large donors like the World Bank and Inter-American Development Bank (IDB) in the first place.¹³⁷

And indeed, the group of donors willing to fully embark on the Paris process has remained small during the past years. The multilaterals and various bilateral donors (Japan, Canada, and 'new donors' such as Cuba, Venezuela, Brazil, Mexico, Argentina, Iran, etc.) have refused to join the basket group. The reasons vary, from strictly procedural to more substantial ones, such as concerns about the institutional capacity of the Ministry or the wish to show a high profile.¹³⁸

During the evaluation period, the Bolivian government did not comply with the requirements for full sector budget support: sector-wide strategies that covered all levels of education and subnational administrations were lacking; the Ministry's budget was not

¹³⁴ Interviews basket and other donors.

¹³⁵ Ministerio de Educación (2010), *Propuesta de Evaluación Conjunta. Fortalecimiento del sector educativo*.

¹³⁶ IOB (2003), *Local Solutions to Global Challenges; Joint Evaluation of External Support to Basic Education in Developing Countries. Case study Bolivia*.

¹³⁷ IOB (2005), *IOB Evaluation Sector-wide approach. Working document Bolivia*.

¹³⁸ See also Ministerio de Educación (2010), *Propuesta de Evaluación Conjunta. Fortalecimiento del sector educativo*.

discussed in Parliament; nor is there a multiannual budget process.¹³⁹ Moreover, unsurprisingly the ME itself prefers the way in which the contributions of the donors are safeguarded in the basket construction, out of concern that domestic funding will otherwise be reduced in response to increased external funding.¹⁴⁰

The ME would actually like more donors to join the *Canasta* in which the Netherlands operates together with Sweden, Denmark and Spain. In general, as reported by the ME in the mutual accountability review, international donors work within the framework of the Ministry's strategic plan 2010-2014 (PEI), though not all donors commit themselves for time periods beyond a year and the ME notes that the level of alignment of international cooperation is lower for programmes funded and implemented at subnational levels.¹⁴¹

But even within the basket, it has proven to be difficult to deal with the different mandates and procedures of the four basket donors.¹⁴² For example, decision making is much more centralised for the Danish and Spanish embassies (they have to consult with their headquarters) than it is for the Dutch. Pressure to spend funds in a given budget year and the different levels of financial contributions of the four donors are complicating factors as well.¹⁴³ In fact, the internal assessment of the basket made in 2008 speaks of an atmosphere of competition and mistrust.¹⁴⁴ With the introduction of a coordinator of the basket and the establishment of internal regulations the coordination has improved. In 2010 the basket donors succeeded in formulating a joint appraisal document for the PEI support, being able to reach a compromise despite different assessments of the members.

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The basket funding is very similar to budget support: the administration is aligned to government procedures, with a common annual audit, and the basket is represented by a lead donor. Unlike with budget sector support, donor funds are transferred to a separate account of the Ministry of Finance especially created for the basket funders. Since the basket, earmarking has diminished considerably, whereby in the latest phase (2010-2014) the funding is no longer earmarked at all. The Netherlands does not predetermine the spending of the funds, but other basket members require more stringent criteria for the use of the basket funds.¹⁴⁵

Throughout the evaluation period the funding proposals by the Netherlands mention ex-ante conditions for funding. For example, in 2000 the funding was conditional on the inclusion of the Ministry's staff in the Institutional Reform Project (PRI) and in 2003 the

¹³⁹ See also EKN La Paz (2010), *Hacia un Nuevo apoyo de la Embajada a la educación en Bolivia*.

¹⁴⁰ As expressed during political consultations in 2008/2009. Ministry of Foreign Affairs The Netherlands (2010), *Report in preparation of Political Consultations 2010*, May 2010

¹⁴¹ Monitoring framework of the report on mutual accountability by the ME (2010), *Propuesta de Evaluación Conjunta*.

¹⁴² EKN La Paz (no date), *Evaluation Basket Funding Bolivia*, confirmed by interviews 2010

¹⁴³ For example, The Netherlands had to lower its budgets considerably due to the entrance in the basket of other members at a later moment and had to adjust its planning frequently due to less flexibility in the procedures of other donors. As described in EKN La Paz (2010), *Hacia un Nuevo apoyo de la Embajada a la educación en Bolivia*. Confirmed by interviews.

¹⁴⁴ EKN La Paz (no date), *Evaluation Basket Funding Bolivia*.

¹⁴⁵ Confirmed by analysis of policy documents EKN and interviews.

condition was the development of a medium term strategy. For the POMA, the trigger was the definition of a list of indicators and results (including the development of a baseline), institutional restructuring, and approval of the POMA by the National Education Congress.¹⁴⁶ However, subsequently funding was provided without the fulfilment of the conditions. As a rather poignant example, in 2004 the planned National Education Congress was cancelled and SIMECAL, responsible for the evaluation in the education sector, was abolished. This did not have any repercussions of the funding by the Netherlands.

Coordination

In 2008, donor coordination mechanisms were formalised and the process of mutual accountability was started. In the Code of Conduct, an agreement was made to use three coordination mechanisms, chaired by the ME:¹⁴⁷

- Inter-agency Committee on Education (CIE)
- Committee of the Fund to Support the Education Sector – basket fund (COFASE)
- Joint Evaluation Meeting (REC)

All donors, universities and national NGOs are invited for the meetings of the REC (once a year) and the CIE (two or three times per year). The CIE works with several working groups (e.g. the EKN leads the one on Planning, Monitoring and Evaluation). Other ministries are also invited for the REC. The basket donors are invited for the COFASE.¹⁴⁸

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According to the monitoring framework in the report on mutual accountability, the CIE has not taken place on a regular basis, and with varying participation.¹⁴⁹ The ‘new donors’, though invited, sporadically participate in the donor-wide coordination meetings.¹⁵⁰ According to the same report, the members of the *Canasta* at least intend to harmonise missions. The Netherlands does not hold formal bilateral meetings with the ME. However, the majority of donors continue with bilateral meetings and reviews and have about one to three individual missions per year, which is a burden on the ME.

The Netherlands has been active in internal donor coordination during the evaluation period. In the years before the basket, the Netherlands cooperated in particular with World Bank and Sweden, e.g. organising the RECs. The Netherlands has coordinated the broad donor group (CIE) with the Japan International Cooperation Agency (JICA) in 2008. In 2009 the Netherlands continued with the co-lead of the broad donor group (with UNICEF), and coordinated the basket as well in 2009, after which Sweden took over the lead of the basket. In 2010, the Netherlands coordinated the broad donor group together with UNFPA, who took over the lead in 2011.

¹⁴⁶ EKN La Paz (2004), BEMO Apoyo al Plan Operativo Multianual de Educación

¹⁴⁷ Ministerio de Educación (2008), Código de Conducta.

¹⁴⁸ Interviews EKN.

¹⁴⁹ Monitoring framework of the report on mutual accountability by the ME (2010), Propuesta de Evaluación Conjunta.

¹⁵⁰ This echoes the findings of the Joint Evaluation of External Support to Basic Education, IOB (2003), which noted a gap between donors providing direct support (IDB, World Bank, Sweden and the Netherlands) and donors providing project support. While these ‘traditional donor’ groups have become closer and better coordinated, the new donors now form a different group.

The following table illustrates the progress made during the evaluation period in the areas of ownership, alignment, harmonisation and coordination.

Table 4.1 Implementation of Paris Principles in the Education Sector in Bolivia				
	Phase I 2001-2002	Phase II 2003-2004	Phase II 2004-2009	Phase IV 2010-2014
Ownership	Limited due to strong operational and monitoring role World Bank	Limited due to strong operational and monitoring role World Bank	Increased ownership and active role Ministry / Bolivian government Mutual accountability process	Increased ownership and active role Ministry / Bolivian government
Alignment				
<i>Finances</i>	Direct funding government (abandoning co-financing arrangement with World Bank)	Direct funding government	Basket funding through special account Ministry of Finance	Basket funding through special account Ministry of Finance
<i>Policy</i>	Spending flexible within specific budget lines of the Strategic Plan 1999-2002	Funding more strictly earmarked to specific budget lines (in response to increased political instability)	Broad criteria set for the use of basket funds (e.g. bilingual education, institutional development). However, the basket retained the right of approval for annual plans	No earmarking Donors no longer approve annual plans and monitoring is results-based (so ex-post)
	Conditions with regards to institutional reform and development of medium term strategy		Conditions with regards to monitoring and institutional strengthening	Conditions with regards to monitoring and institutional strengthening
Harmonisation				
	Different aid modalities and procedures of different donors Technical and financial progress reports produced by Ministry, assessed by World Bank	Different aid modalities and procedures of different donors Technical and financial progress reports produced by Ministry, assessed by World Bank	Basket funding with Sweden, Denmark and Spain Memorandum of Understanding (2008) signed by basket on common procedures, monitoring and control mechanisms Code of Conduct (2008); broad donor agreement to respect Paris Declaration World Bank, BID, 'new' donors etc. own projects and programmes	Basket support with new members (Denmark out 2013, UNFPA in 2011). Joint appraisal document NL, Sweden, Denmark, UNFPA and Spain Second Memorandum of Understanding (2010) on common procedures, monitoring and control mechanisms Other donors continue own projects and programmes with/without Ministry
Coordination				
	Different groups: NL-Sweden WB, BID, NL, Sweden Ministry and four donors	Different groups: NL-Sweden WB, BID, NL, Sweden Ministry and four donors, occasionally inviting other donors	Code of Conduct (2008) specifies three mechanisms: REC, CIE, COFASE Several donor coordination meetings in different groups (incl. basket)	Code of Conduct (2008) specifies three mechanisms: REC, CIE, COFASE Several donor coordination meetings in different groups (incl. basket)

The general feeling emerging from the interviews with basket donors, the EKN and the ME, is that the ME has benefited most of the basket construction: its transaction costs were lowered and it could count on a relatively predictable and considerable financial stream with few specific conditions attached. Contrary to this, the basket donors feel that they are spending more time and energy in coordination and aid management than they did before (e.g. to reach common positions in meetings with the ME or organise each donor's contribution to fulfil the payments requests of the ME on time).

In sum, this overview shows for the Netherlands a gradual move away from direct donor influence on design and implementation of the aid towards a large degree of ownership of policy formulation and implementation by the Bolivian ME. This is accompanied by a gradual movement by the EKN from a more conditioned type of support towards a more general sector support with fewer conditions attached. From interviews and the report on mutual accountability by the ME, the picture emerges of the Netherlands being a frontrunner in the pursuit of the Paris Principles.

4.2 Monitoring and evaluation

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Apart from the current evaluation, the Netherlands has not carried out individual monitoring and evaluation of the support to the ME.¹⁵¹ Before the *Canasta*, the EKN relied on the reports produced by the ME and administered by the World Bank. Since the basket funding, the EKN has worked with the reports produced by the ME, including administrative data and technical and financial reports specially prepared for the *Canasta*, and joint evaluations.

Monitoring

As registered in the two Memorandums of Understanding with the *Canasta* (2005, 2010) that apply to the evaluation period, it is the Ministry's responsibility to prepare documents required for the monitoring of the implementation of its policies.¹⁵² Three types of documents are produced: technical progress reports, financial progress reports and audits. All basket donors have accepted to use this set of documents for their monitoring. Separate reports for individual donors are no longer required, which is a major efficiency gain for the Ministry.

The basket donors, including the Netherlands, are rightly of the opinion that this monitoring in the past has been insufficient.¹⁵³ A review of progress reports reveals that they were indeed often very detailed and focused on financial inputs (execution of funds, allocation among projects) rather than on outputs or results. The amount of indicators made it very

¹⁵¹ With regard to the monitoring and evaluation of the projects in the education programme of the EKN, the Embassy follows the formal procedures of the ministry of foreign affairs. Beyond that, external evaluations were not available in the files for the majority of the projects (the evaluations of Plan International and FAUTAPO are discussed elsewhere in this evaluation).

¹⁵² Ministerio de Educación (2005), Memorandum de Entendimiento en relación al FASE; Ministerio de Educación (2010), Memorandum de Entendimiento, FASE III.

¹⁵³ Interviews: EKN and basket partners.

difficult to assess progress. The POMA included about 125 indicators in the monitoring framework for 7 objectives. In 2006 monitoring was organised around 63 sub projects. The quality of monitoring information is rather poor because of statistical and reporting deficiencies in the education information system (see chapter 6). In addition, this monitoring system reveals little of what is actually happening at local levels, in the schools. Joint field visits have been organised only sporadically and the choice of locations was very selective.¹⁵⁴

The system of regular auditing seems to be functioning well within the existing system of rules and regulations.¹⁵⁵ The ME has improved its financial planning and auditing through the application of financial systems developed by the Ministry of Finance. No major cases of corruption were reported as far as could be established from the existing documents or interviews.¹⁵⁶

The Memorandum of Understanding of 2010, linked to the PEI, included measures for improving the monitoring of the government's education strategy. Fourteen results indicators were identified.¹⁵⁷ However, these indicators are subdivided into more than 60 specific indicators. Unfortunately, at the time of writing, the revised monitoring framework was not yet finalised. Indicators still need to be further defined and baseline data have to be collected. A result based monitoring system would definitely be an improvement, but at first glance there seems to be a risk that the reporting will still be very detailed, with a large number of often less relevant indicators.

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Another effort to improve monitoring, in which the Netherlands has played an active role, is the introduction in 2010 of different working groups as part of the dialogue between government and donors. These working groups focus on specific topics relevant for results in the education sector. The Netherlands currently leads the working groups on equity and opportunities (gender) and on mutual accountability, which includes instruments for monitoring and evaluation. This responds to the observation made in the report on mutual accountability that the donor coordination meetings (CIE, REC) focused on mere exchange of information, mainly financial, rather than providing a forum for dialogue on education policies.¹⁵⁸

¹⁵⁴ Interviews.

¹⁵⁵ Only for 2005 no approved audit report could be produced because of reporting problems. Denmark organised an additional audit that could not establish any irregularities and donor payments were not suspended.

¹⁵⁶ In November 2002 the national press published about reported irregularities in the implementation of the Programa de Reforma Educativa. The at that time existing Unidad Técnica de Lucha contra la Corrupción investigated the case. According to a memo of the Embassy of 15 July 2003 the report of the Unit was ambiguous but did not identify corruption or nepotism nor did it show irregularities.

¹⁵⁷ Among others for: coverage, technical and special education, drop out rates, primary and secondary school graduation rates, teacher training (including training in the new curriculum), exam results, knowledge of a relevant indigenous language, availability of revised teaching material, job descriptions for permanent Ministry personnel and public expenditure rates for education

¹⁵⁸ Monitoring framework of the report on mutual accountability by the ME (2010). Propuesta de Evaluación Conjunta.

Evaluation

Independent evaluations of the education sector have been scarce in the period 2000-2010. In fact only two evaluations were exclusively directed to the education sector, the country report for Bolivia of the Joint Evaluation of External Support to Basic Education in Developing Countries of September 2003 ('Local solutions to Global challenges') and the Evaluation of the Multiannual Operative Programme (POMA) for Support of the Education in Bolivia 2004-2009 conducted in June of 2010.¹⁵⁹

The Joint evaluation of 2003 was an international exercise of thirteen donor countries, including the Netherlands, and four developing countries, covering the period 1990-2002.¹⁶⁰ Bolivia was one of the four case studies. The report describes the early involvement of the World Bank, the Inter-American Development Bank (IDB), the Netherlands and Sweden in the *Reforma Educativa*.

The most recent evaluation in 2010, organised by the basket donors,¹⁶¹ is problematic in various ways.¹⁶² First of all, the evaluation was late. A joint external evaluation of the POMA was initially scheduled to evaluate its midterm results. In 2010, the time frame for the evaluation, required for it to be part of the appraisal process for the PEI, was very short. However, more importantly, the quality was considered insufficient. The Ministry rejected the report and the basket donors used it only selectively in the appraisal document.

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Certainly, the basket donors have made use of local research on educational developments. The Netherlands has financed several of such studies (see section 3.3). However, the often critical analyses of the *Reforma* are not mentioned in the Embassy's appraisal or monitoring documents.¹⁶³ In general, it is not obvious how the available monitoring and evaluation information has fed back into the education programme of the Netherlands.

The Memorandum of Understanding for the PEI indicates that a joint evaluation (financed by the Ministry itself) will be held one year before its expiration. It would have been preferable to plan an earlier evaluation allowing for a more relevant feedback of its findings and with more guarantees of independency.

¹⁵⁹ However, there is also a study on the sectoral approach in Bolivia, which includes the education sector (IOB (2005): IOB Evaluation Sector-wide approach. Working document Bolivia); and assessments of progress in the education sector such as from the World Bank (Contreras, M.E. y M. L. Talavera (2004), Examen parcial. La reforma educativa boliviana 1992-2002).

¹⁶⁰ IOB (2003), Local Solutions to Global Challenges; Joint Evaluation of External Support to Basic Education in Developing Countries. Case study Bolivia.

¹⁶¹ The team was contracted directly under an existing umbrella arrangement with the Swedish government.

¹⁶² HIFAB (2010), Evaluación del Programa Operativo Multianual de Apoyo al Sector Educativo en Bolivia 2004-2009.

¹⁶³ See for example; Pérez S. V. B., y S. M. Oviedo (2002), Estado de situación de la educación en Bolivia; and Contreras, M.E. y M. L. Talavera (2004), Examen parcial. La reforma educativa boliviana 1992-2002.

4.3 Conclusions

Donor harmonization and alignment has been marked by two big steps: the cooperation between the World Bank, Inter-American Development Bank, Sweden and the Netherlands on programmatic aid that started in 1994 and the creation of the basket in 2004. This was possible against the background of a gradual strengthening of the leadership of the Bolivian ME.

The commitment of the Dutch Ministry of Foreign Affairs to sector-wide approaches and the Paris Principles influenced the way in which the Dutch support to the Ministry of Education has been provided. The Embassy has played a pivotal role in the pursuit of the Paris Principles during the whole evaluation period and its approach was characterised by the commitment to donor harmonisation and alignment, and country ownership. Earmarking was gradually reduced. Pre-conditions for funding were mentioned in project proposals and some financing agreements, but failure to fulfil these conditions was never a reason to limiting funding. Of course, in such a volatile political and social environment as characterised Bolivia during the evaluation period, earmarking and pre-conditions will always be a challenge. Acting as part of a basket also requires certain trade-offs. However, in the interest of change at school-level for teachers and students, such an approach necessitates much closer and effective monitoring and evaluation of the results of the education strategies (and its determinants), than has been the practice to date.

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The ME has benefited most from the reduction in transaction costs caused by the use of basket funding. On the contrary, the basket donors, including the Netherlands, spend a lot of time and effort on internal coordination and harmonization. Apart from transaction costs there are other obstacles on the road to Paris. The group of donors willing to commit to the Paris Principles has remained small during the past years. Even basket donors retain different opinions and approaches among each other, but have nevertheless been able to make significant moves towards coordination, harmonisation and alignment with the government policies and procedures (e.g. development of a joint funding proposal for the PEI). There are limits to the sector-wide approach in education in Bolivia, given that the conditions for sector budget support are not fulfilled (e.g. budget process) and that the ME actually prefers the current arrangements.

5

Education governance, expenditure and finance

This chapter discusses the way in which the education sector is governed and managed, and the resulting capacity at subnational levels. The chapter starts with a description of decentralisation and popular participation in the education sector specifically, important components of the *Reforma* supported by the Netherlands in the early part of this decade. This analysis is important for evaluating the efficiency and sustainability of the Dutch contribution to the education sector in Bolivia. Thereafter, expenditure on education, mainly by government and external donors, is analysed for the evaluation period, in order to assess the sustainability of the support provided by the Netherlands, as one of the main donors.

5.1 Organisation education sector governance

Decentralisation

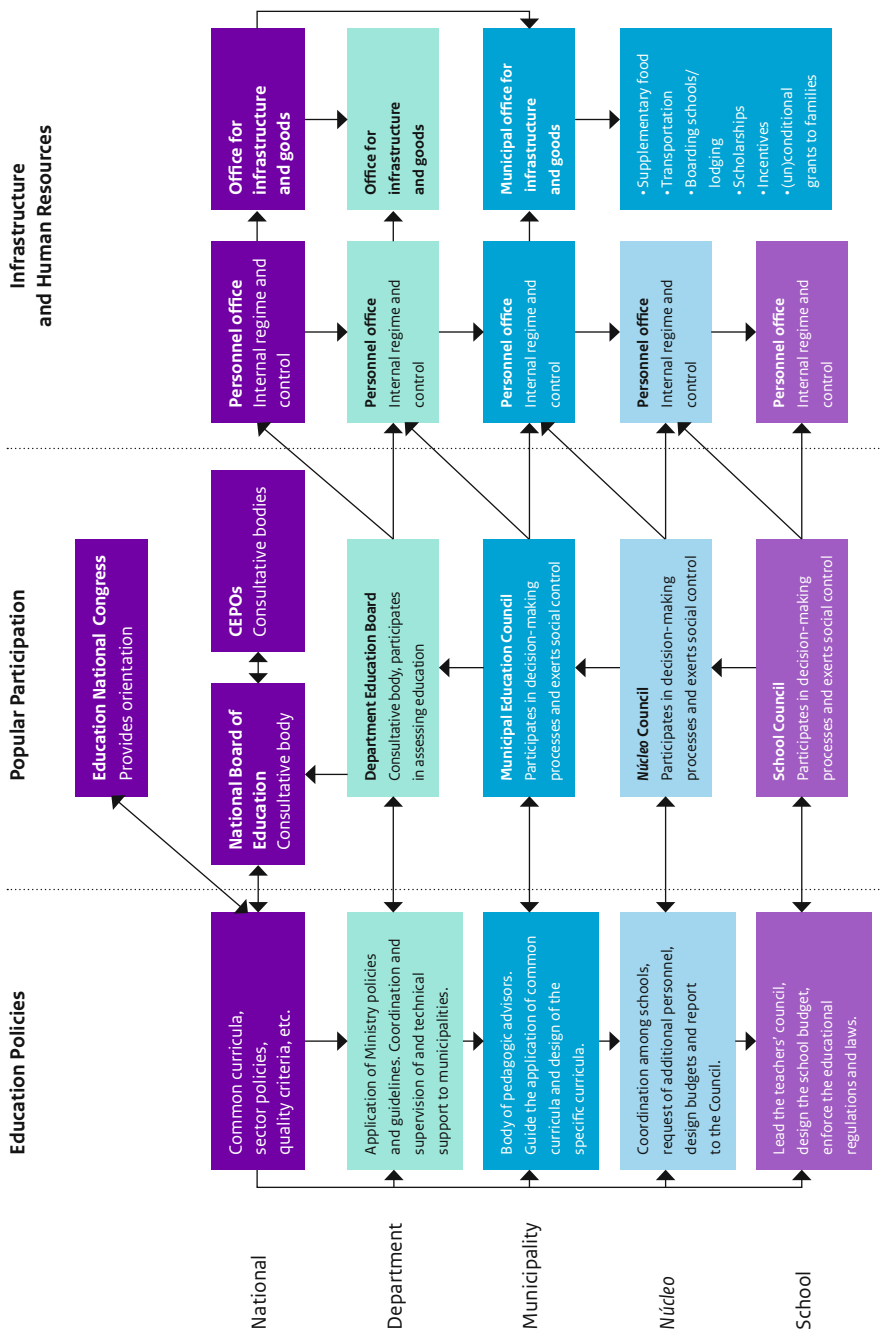
The *Reforma* established different management levels in the education sector in Bolivia, building on the municipalisation (decentralisation) and popular participation developments that had been going on for some time already in Bolivia.

Each of these levels has been given specific mandates and responsibilities, and associated funding, through various laws and decrees. The five main levels are:

- National: Ministry of Education in La Paz,
- Departmental: Departmental Service of Education (SEDUCA), in each of the nine departments,¹⁶⁴
- Municipal: educational district at municipal level,
- Submunicipal: educational networks ('núcleos') composed of a secondary school and a group of primary schools,
- Communities: educational units ('*unidad educativa*' i.e. schools).

¹⁶⁴ During the evaluation period, the national and municipal levels were elected governments (in departments only the executive branch, so-called *prefectos*). The *prefectura* is the intermediate level of government, which has jurisdiction over the departments.

Figure 5.1 Levels of decentralisation¹⁶⁵ and popular participation in the education sector¹⁶⁶



¹⁶⁵ Pedagogical advisors (Education policy at municipal level) only existed until 2004 (see Section 3.2)

¹⁶⁶ Note that *consejo* is translated as board and *junta* is translated as council.

Though responsibility for infrastructure, equipment and materials was transferred to local governments at municipal level, the *Reforma* led to deconcentration rather than decentralisation.¹⁶⁷ The central level has retained more decision-making power and responsibility for implementation of programmes than a normative and regulatory role, as prescribed in the relevant laws and decrees would imply.¹⁶⁸ The new law on education '*Avelino Siñani - Elizardo Pérez*' is considered as a movement towards even more centralism.

The teacher unions, militant and powerful in Bolivia, have always opposed attempts to further decentralisation in the education sector.¹⁶⁹ For example, in 2004 a last effort was made to strengthen decentralisation through a new organisational structure for the sector.¹⁷⁰ However, this was fiercely opposed by the teacher unions, with violent strikes, ultimately leading to the renunciation of the minister of education at that time.

This process, combined with limited capacity at central level (as discussed earlier in chapter 3), had a negative influence on the capacity to implement education reforms and policies at subnational levels. Moreover, frequent changes in jurisdiction and resulting grey areas in the decentralisation process led to frequent conflicts and partial implementation. For example, the role of *prefecturas* (intermediate administrative level) and the SEDUCA was minimised to becoming mere administrative bodies. Their technical-pedagogical role was never revitalised due to the lack of clarity on the content of this role, limited resources and capacity, and the continuing concentration of programmes, projects and activities, as well as human resource management, in the central government.¹⁷¹

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The capacity at municipal level to fulfil its role in the education sector has nevertheless been growing. Their mandate and responsibilities, as well as their resources and expenditure for education have increased over the last ten years. Their work has been supported through programmes such as Municipal Education Programme (PROME), indirectly supported by the

¹⁶⁷ Deconcentration is considered the most limited type of decentralisation, as central government institutions do not really transfer any political power, but rather establish centralist institutions in different localities, from where central government employees operate.

¹⁶⁸ For example with regard to curriculum development as established in: Government of Bolivia (1995), Decreto Supremo 23951. Also see: Pérez S. V. B., y S. M. Oviedo (2002), Estado de situación de la educación en Bolivia.

¹⁶⁹ Already in 1992, at the National Education Congress, a resolution was passed opposing decentralisation (Voto Resolutivo No 1, 1992). Teachers unions considered decentralization as neglect of the responsibility of the government to provide education services. Moreover, decentralisation posed a challenge to the political and financial strength of the national teacher unions (e.g. union contributions were collected by the central government). However, prefecturas also rejected the decentralization efforts because of the uncertainty it posed to their financial positions. To date, these issues have not yet been resolved. See the work by Talaveera (2002) on resistance to reforms by teacher unions before and during the *Reforma*. Also, Cardozo (2009)

¹⁷⁰ Government of Bolivia (2004), Decreto Supremo 27457.

¹⁷¹ Mesa de Trabajo en Educación (2006), Rol y Potencialidades de la Descentralización en Educación Bolivia, pp. 53-55. This picture is confirmed in interviews with the ME and through visits to, for example, the SEDUCA of La Paz and Sucre. In Santa Cruz, the role of the SEDUCA is weakened by the establishment of parallel structures in response to conflicts between the central and departmental (opposition) governments.

basket funding of the Netherlands. However, there remains considerable variation in the capacity to manage and finance education services, which has not been aided by the fiscal transfers to municipalities (see below in section 5.2).¹⁷² In particular the municipalities with less than 5,000 habitants (mainly in Oruro and Pando department) are in a difficult position due to their dispersed population.¹⁷³ Unfortunately, there is no comprehensive national policy to deal with their specific problems in providing services such as transport, school breakfasts and boarding schools.¹⁷⁴

Participation

In line with international trends and the democratisation process ongoing in the country at that time¹⁷⁵, the *Reforma* also stressed the importance of popular participation (*Participación Popular*).¹⁷⁶ Different entities were established in the education system:¹⁷⁷

- National Education Congress (CONED), an evaluative forum at national level representing different sectors other than the education sector,¹⁷⁸
- Indigenous People's Education Councils (CEPOs) for different population groups nationwide (e.g. Aymara, Quechua, Guaraní and Amazónico), set up to participate in policy development and guard their implementation, especially with regard to interculturality and bilingualism,
- Educational boards (*Consejos educativos*), consultative organisations at national and departmental level for the education sector,
- School councils (*Juntas escolares*) at school and municipal level, parents' organisations with decision-making power.

¹⁷² UDAPE-UNICEF (2006), Bolivia. El Gasto de los Hogares en Educación; FAM-BOLIVIA (2008), El desayuno escolar en Bolivia Diagnóstico de la situación actual.

¹⁷³ Ameller, V. (2000), La problemática de los gobiernos municipales de escasa población. Consideraciones socioeconómicas para un tratamiento diferenciado; and Ameller, V. (2005), El mito del desarrollo en municipios inviables.

¹⁷⁴ It has been noted that as part of the decentralisation process there is limited coordination between municipalities and the government in order to link the education policies to, for example, infrastructure investments and incentive programmes. See for example World Bank (2006), Basic Education in Bolivia. Challenges for 2006-2010, Report n. 35073-BO. Confirmed in interviews.

¹⁷⁵ In October 1982, after almost two decades of dictatorial military governments, a democratic government, presided by Hernan Siles Zuazo of the Unidad Democrática y Popular (UDP), was installed in Bolivia.

¹⁷⁶ Government of Bolivia (1994), Ley 1551 de Participación Popular.

¹⁷⁷ Government of Bolivia (1995), Ley 1565 de Reforma Educativa. See also: El Government of Bolivia (1995), Decreto Supremo 23494, artículo 1 and 2 (Compendio Normativo sobre Descentralización). FAM-Bolivia, Ministerio Sin Cartera Responsable de Participación Popular y USAID (2005), Desarrollo Democrático y Participación Ciudadanía (DDPC).

¹⁷⁸ Very recently, the government has established a new mechanism for public accountability with regard to the annual budgets of Ministries, whereby citizens are invited to a presentation of the annual report. For the ME this took place in December 2010. The effect of this new mechanism on participation remains to be seen.

Here there is also a discrepancy between the ambitions of the different laws and decrees and the practical implementation of the popular participation.¹⁷⁹ The Boards and Congress have played a limited role in the education sector. The diverse representation in those organisations made it difficult to have a significant impact on policy development as any sort of consensus is impossible. Moreover, National Education Congress did not assemble often enough – actually only once in 2006 - to fulfil a role in monitoring education sector policies.¹⁸⁰ However, it has been argued that the success of these kinds of national consultation forums should not be measured only by the end result, e.g. a joint declaration, but also by the process, which consists of different preparatory meetings at (sub) national levels. The Netherlands Embassy has supported this kind of participation (e.g. Education Forums in 2000).¹⁸¹ Through this process the importance of the education sector is reconfirmed by various actors in the Bolivian society, including those outside the education sector. This is a useful outcome of the inclusiveness, even though if that has hindered the process at the same time.¹⁸²

The CEPOs are probably the most successful organisations for participation in the education sector and the only ones that influence national education policy.¹⁸³ There are 7 different CEPOs for different population/language groups (*Aymara, Quechua, Guarani, Amazónico, Chiquitano, Mojeño* and *Guarayo*), who are in turn united in the national organisation Indigenous Education Coalition (BEIO, *Bloque Educativo Indígena Originario*). Since 1997 they have actively participated in development of policies at national level through studies, proposals and advocacy concerning inter-cultural and bilingual education.¹⁸⁴ They have also been influential regarding the teacher colleges specialised in bilingual and intercultural education and developed pedagogical material in these areas. In certain areas, the CEPOs have been able to develop a regionally-specific curriculum, in cooperation with the communities and teachers.¹⁸⁵ At local level their role was more limited, for example with

¹⁷⁹ For example, Government of Bolivia (1994), *Ley 1551 de Participación Popular*; Government of Bolivia (1995), *Ley 1565 de Reforma Educativa*; Government of Bolivia (1995), *Decreto Supremo 23494*; Government of Bolivia (1999), *Decreto Supremo 25273*.

¹⁸⁰ The Congress should meet at least every five years. In 2004, despite preparations the Congreso Nacional did not meet due to opposition from the teacher unions.

¹⁸¹ EKN La Paz (2001), *Memorandum de Valoración Análisis y formulación de propuestas de políticas educativas con participación social*.

¹⁸² For a more detailed discussion, see for example Barié (2009), *Entre tizas y pancartas: La educación primaria en Bolivia*; and Cajas (2000), *Formulación y aplicación de políticas educativas en Bolivia 1994-1999*

¹⁸³ *Ley Reforma Educativa*, art 6, 5 (1995) includes CEPOs with their specific mandate, as part of the Popular Participation in the education sector. It is also included in the *Reglamento sobre Órganos de Participación Popular*. Source: Government of Bolivia (1995), *Decreto Supremo 23494*.

¹⁸⁴ The main proposal originated from the Primer Congreso Nacional de Educación de los Pueblos Indígenas, the so-called 'green book', published with funding from the Netherlands. This document has heavily influenced the forerunner of the currently accepted education law (*Anteproyecto de Ley de la educación*). Interviews CEPOS; Página Web CEPOs, www.cepos.bo.

¹⁸⁵ *Universidad Mayor de San Simón & Cooperación Técnica Alemana-GTZ (2006), Informe Final de Proyecto 'Apoyo a los Consejos Educativos de Pueblos Originarios – CEPOs*.

regard to the development of locally-adapted curriculum.¹⁸⁶ However, more recently, the CEPOs have been asked to assist the government at national level with the development of regional curricula.

Despite being formal organisations, established by government as part of the *Reforma*, the CEPOs are funded by international agencies, among which the Netherlands. On the one hand, this created the independence from government that was required for their advocacy role. However, on the other hand, this dependence on external resources threatens their sustainability.¹⁸⁷ Moreover, now that the current government has incorporated the proposals of the CEPOs into the new education law and assimilated the discourse of the CEPOs, i.e. the focus on inclusive and inter- and intra-cultural education, the CEPOs need to redefine their role in the education system.

The school councils, or *juntas*, also play an important role in the education system in Bolivia. There is unfortunately no nation-wide evaluation of the functioning of the school councils, though a few studies with smaller samples do shed some light on their activities and roles.¹⁸⁸ The councils have firmly established themselves as new actors within the education system.¹⁸⁹ The resulting redistribution of power between communities, parents and teachers has inevitably brought about tensions. The school councils have been allowed to expand their roles from mere service to social control. More specifically, for example, from helping with school activities, delivering school breakfasts to monitoring of teachers' attendance and discipline, and providing local knowledge as part of the curriculum.¹⁹⁰ Moreover, the *juntas* have a say in the planning of infrastructure and educational services implemented by the municipalities.¹⁹¹

However, direct involvement of the councils in evaluating teachers and school management, or in pedagogical matters, has been actively opposed by the teachers at local and national level since 1995. The resulting tensions have been worse in rural areas than in urban areas, though in rural areas the school councils are often stronger because they

¹⁸⁶ See for example: Lopez, L. E. et al. (2005), *De resquicios a boquerones: La educación intercultural bilingüe*; and Machaca, G. (2007), *La participación social en la educación en Bolivia en el contexto de la implementación de la EIB. Estudio de caso en las comunidades de Itanambikua y Tomorco.*

¹⁸⁷ Interviews CEPOs, EKN.

¹⁸⁸ See for example a study of 153 communities in 4 regions: Lopez, L. E. et al. (2005), *De resquicios a boquerones: La educación intercultural bilingüe. And an in-depth study of two indigenous communities*: Machaca, G. (2007), *La participación social en la educación en Bolivia en el contexto de la implementación de la EIB. Estudio de caso en las comunidades de Itanambikua y Tomorco.*

¹⁸⁹ It is important to note that before the *Reforma Educativa*, *juntas de auxilio escolar* already existed since 1955 (Código de la Educación Boliviana) which were at the service of the teachers and school management rather than independent organisations with decision making power. Source: Machaca, G. (2007), *La participación social en la educación en Bolivia en el contexto de la implementación de la EIB. Estudio de caso en las comunidades de Itanambikua y Tomorco.*

¹⁹⁰ Machaca, G. (2007), *La participación social en la educación en Bolivia en el contexto de la implementación de la EIB. Estudio de caso en las comunidades de Itanambikua y Tomorco.*

¹⁹¹ Through the so-called OTBs (Organizaciones Territoriales de Base).

originate from existing indigenous organisations.¹⁹² As a result, in most places the councils are functioning, but mostly in support of schools (school breakfasts and maintenance) and merely monitoring presence of teachers and directors, rather than being involved with pedagogical methods such as the curriculum. Because of the limited role of the boards and the National Congress, in which the councils should have been represented, the school councils do not play any role at national level.

5.2 Education sector expenditure

National and subnational expenditure

As illustrated in table 5.1, expenditure on education has grown over the evaluation period, both in absolute terms and as a percentage of GDP. During most of the evaluation period (2000-2008), public expenditure on education was the largest budget item of social expenditure (followed by social protection and health). It amounted to 25 % of total government expenditure. This includes all education, ranging from pre-primary to tertiary education.

According to preliminary government sources, public expenditure on education amounted to 5.8 % of GDP in 2000 but quickly rose to 7 % in 2002 to 2008.¹⁹³ This percentage is high compared to other countries in the region.¹⁹⁴ Certain characteristics of Bolivia can be expected to increase the costs of providing education, for example, the low urbanisation level (only 64 % urban population in 2008), low density of population (9 habitants per km²), migrating and dispersed population, multi-ethnic and multilingual population (36 groups), and geographical complexities with very diverse ecological areas.

¹⁹² Lopez, L. E. et al. (2005), *De resquicios a boquerones: La educación intercultural bilingüe*. In many places juntas are supported by external agencies (international NGOs, GTZ, Danida).

¹⁹³ PNUD/UDAPE (2010), *Bolivia Development Indicators*. In: *Human Development Bulletin*. Other sources, such as Navarro, O. (2009), *Ministerio de Educación: Gasto Educativo e Indicadores del periodo 2004 – 2008*, present different figures but the trend of rising expenditure on education and increasing % of GDP remains.

¹⁹⁴ UIS Statistics in brief. *Latin America and the Caribbean*, <http://stats.uis.unesco.org>.

Table 5.1 Public expenditure social sectors and education, 2000-2008 (BOB million and % of GDP)

	2000	%	2001	%	2002	%	2003	%	2004	%	2005	%	2006	%	2007	%	2008*	%
Total Government Expenditure	12.771		14.430		15.823		19.037		19.037		22.080		23.557		27.919		35.725	
Total Public Social Expenditure	8.496	16,0	9.541	18,0	10.652	19,0	11.643	19,0	12.610	18,0	13.592	18,0	15.467	17,0	17.903	17,0	22.227	18,0
Public Expenditure on Education	3.026	5,8	3.337	6,3	4.023	7,1	4.543	7,3	4.855	7,0	5.187	6,7	6.123	6,7	7.103	6,9	8.417	7,0

(*) Preliminary figures

Source: UDAPE based on data from General Direction of Fiscal Accountancy, Ministry of Finance.

However, public expenditure on education, in Bolivia as elsewhere, is for the largest part composed of salaries for teachers (about 50 % of total expenditure, including universities, between 2000 and 2007).¹⁹⁵ Both the salaries and the amount of teachers increased in the past ten years. In 2000 there were 84.000 registered teachers, which rose to 108.000 by 2008. These numbers benefited from a particularly large increase in 2002, with the creation of new positions enabled by HIPC II (as well in 2008 and 2009). As a result of the large increase in teachers during the evaluation period, the average student/teacher ratio for pre-primary to secondary education also dropped from 26 in 2000 to an estimated 23 in 2008 (see table 5.2).

	2000	2001	2002	2003	2004	2005	2006	2007	2008*
Pre-primary, primary and secondary education	26	26	26	25	25	25	25	24	23
Urban	29	29	29	28	28	28	28	27	27
Rural	23	22	22	21	21	21	20	19	19

(*) Preliminary figures

Source: UDAPE (2010).

The public expenditure on education depicted in table 5.3 includes all levels. Unfortunately the most up-to-date information on public expenditure per level runs up to 2005 only.¹⁹⁶ The table shows how low the expenditure on secondary education has been compared to primary education and tertiary education. Not surprising given that the *Reforma* concentrated almost exclusively on obligatory primary education (see section 2.2). This pattern will certainly have to change following the commitment made in the new Constitution to universal, free and obligatory education up to secondary school. Alternative and technical education, an area of concern for the Netherlands, has also not received substantial levels of funding in the past years. Though the current government (and the Netherlands in tow) is committed to education at levels other than primary, there is insufficient data to establish whether this commitment has already translated into increased funding.¹⁹⁷

¹⁹⁵ Ministerio de Hacienda, Viceministerio de Tesoro y Crédito Público, Unidad de Programación Fiscal (2008), *Dossier Estadístico 1990-2007 Vol. XI*. La Paz: Ministerio de Hacienda. According to UDAPE-UNICEF (2006), Bolivia. *El Gasto de los Hogares en Educación*, this amounts to 82% of total expenditure on education excluding universities.

¹⁹⁶ UDAPE-UNICEF (2006), Bolivia. *El Gasto de los Hogares en Educación*.

¹⁹⁷ The ME is currently negotiating with donors about credits and grants for the TVET programme.

	2000		2001		2002		2003		2004		2005	
	BOB	%	BOB	%	BOB	%	BOB	%	BOB	%	BOB	%
Public Education Expenditure	3.026		3.377		4.023		4.543		4.855		5.187	
Public Education Expenditure, excl. Tertiary	2.560	100	2.615	100	2.779	100	2.920	100	3.449	100	3.220	100
Pre-primary	116	5	119	5	113	4	122	4	145	4	129	4
Primary	1.808	71	1.852	71	1.992	72	2.106	72	2.440	71	2.307	72
Secondary	396	15	431	16	459	17	490	17	620	18	587	18
Higher, non - university	101	4	68	3	72	3	63	2	77	2	50	2
Alternative	108	4	114	4	113	4	111	4	135	4	120	4
Technical	31	1	31	1	30	1	28	1	32	1	27	1

Source: UDAPE-UNICEF (2006).

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Public expenditure on education in Bolivia includes expenditure at national and subnational levels, whereby departments and municipalities account for more than half of the expenditure, mainly for teacher salaries and infrastructure.

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Expenditure national level (incl. universities)	1.159	1.299	1.640	1.595	1.497	1.520	1.894	2.796	3.890
Expenditure departments	1.629	1.786	2.014	2.476	2.853	3.179	3.393	3.296	3.726
Salaries pre-primary, primary, secondary teachers	1.563	1.718	1.945	2.264	2.537	2.712	3.040	3.135	n/a
Expenditure municipalities	238	292	370	472	505	488	836	1.010	800
Total subnational expenditure (departments & municipalities)	1.867	2.078	2.384	2.948	3.358	3.667	4.229	4.306	4.526
Public Education Expenditure	3.026	3.377	4.023	4.543	4.855	5.187	6.123	7.103	8.417

Source: Ministerio de Hacienda, Viceministerio de Tesoro y Crédito Público, Unidad de Programación Fiscal (2008); PADEP-GTZ: Laboratorio Fiscal; Unidad de Análisis de Políticas Sociales y Económicas (2006).

¹⁹⁸ Public expenditure on education, including tertiary education.

Allocation of expenditure

The domestic resources for national and subnational education expenditure originate from:

- National Treasury: tax collection, custom office levies, income from hydrocarbons, debt relief etc. Income has been exceptionally high in recent years due to economic growth and income from hydrocarbons (see figure 5.2). However, it is also a very volatile source of income, given the dependency on developments in market prices and world economy.
- *Prefecturas*: earmarked transfers from national level (including those for salaries in the education and health sector), income from exploitation of natural resources¹⁹⁹ (which are divided between departments based on complex allocation rules) and unconditional transfers.
- Municipalities: municipal taxes (e.g. property, vehicles), transfers from national level based on population estimates,²⁰⁰ conditional transfers through the National Fund for Social and Productive Investments (FPS²⁰¹) for infrastructure, specific sectoral transfers originating from debt relief based on amount of pupils (HIPC II)²⁰² and discretionary transfers from central government, such as the '*Bolivia avanza: Evo cumple*' programme.²⁰³

¹⁹⁹ For example, the so-called *regalías* (royalties) or compensations for production of non-renewable natural resources; tax on commercialisation of hydrocarbons and derivatives (IEHD) and the direct tax on exploitation of hydrocarbons (IDH). Division occurs according to different laws and decrees such as *Ley de Hidrocarburos*, Ley 3058, and the *Ley 1551 de Participación Popular*.

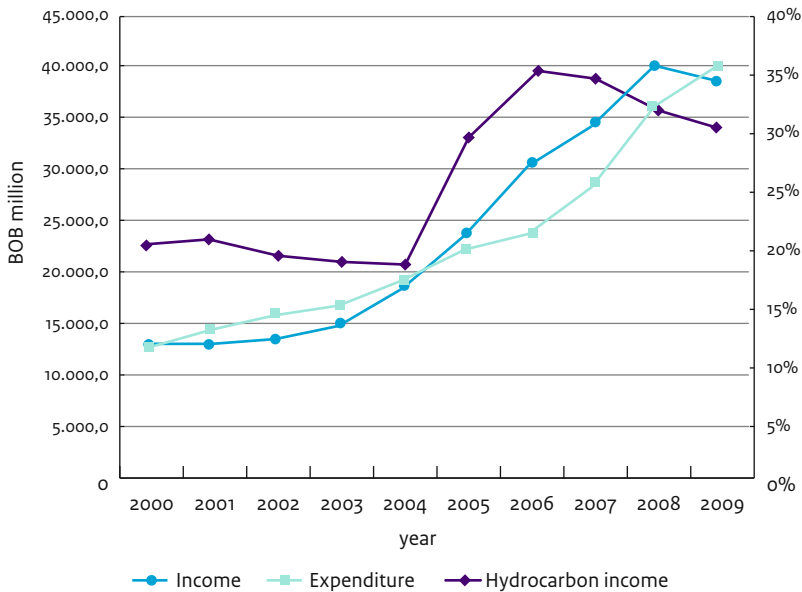
²⁰⁰ *Transferencias de coparticipación tributaria* distribute 20% of national tax income to municipalities based on population projections for the implementation of the municipal development plans (and some nation-wide benefit programmes like maternal and child insurance), as part of the decentralisation process. Also *transferencias del Impuesto Directo a los Hidrocarburos*, which is earmarked for education services (besides health, roads and local economic development), such as education management at municipal level, promotion of access through complementary food, transport and boarding schools. Source: Government of Bolivia (2005), *Decreto Supremo 28421*.

²⁰¹ FPS (Fondo de Inversión Productiva y Social or Social Investment Fund) is the financial instrument through which the national government aligns subnational investments with national, sectoral policies. Through FPS resources are channelled for education investments at municipal level, but designated by the ME at central level. It was established in the *Ley N° 2235 del Diálogo Nacional* in 2000, replacing the FIS (Fondo de Inversión Social) which also replaced the FSE (Fondo Social de Emergencia).

²⁰² *Cuenta Especial Diálogo 2000*, whereby the law specifies that 20% of these resources should be used to improve the quality of public education services (through infrastructure, materials, incentives such as transport), according to the municipal development plans. Source: Government of Bolivia (2000), *Ley 2235 de Diálogo Nacional*.

²⁰³ This programme is part of the ALBA programme (*Alianza Bolivariana para los Pueblos de Nuestra América*), whereby Bolivia received about BOB 472 million from Venezuela between 2006-2009. The majority of this funding is spent in the departments La Paz and Cochabamba (58%). Source: *Ministerio de Economía y Finanzas Públicas* (2009), *Memoria Ministerio de Economía y Finanzas Públicas*.

Figure 5.2 Overall government revenue and expenditure, 2000-2009 (BOB million)



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Source: UDAPE (2010).

It is important to note that all transfers from national level depend on complex allocation rules, population estimates originating from the Census in 2001, teachers/pupils registered and the capacity to tax the population in different municipalities. As a result, the available resources for the education sector vary significantly between different municipalities (e.g. rural versus urban) and departments.²⁰⁴

As an illustration, a rough estimate of subnational expenditure per student has been calculated for all departments in the year 2008.²⁰⁵ Table 5.5 shows how the public expenditure per student varies a lot between departments, not only because variations in amount of students (and thus teacher salaries) but also due to large differences in expenditure by municipalities and discretionary programmes such as *Evo Cuple*.

²⁰⁴ For example, on average the income from taxes for municipalities amounted to about 30% of total income between 2000 and 2009. However, for the smaller municipalities, with less than 50,000,- inhabitants, tax income was no more than 5,5 % of the total income during that same period. Source: PADEP-GTZ: Laboratorio Fiscal, <http://ss.padep.org.bo/labfiscal/default.aspx>.

²⁰⁵ It is a rough estimate of the expenditure per student in pre-, primary and secondary public schools, whereby the variation is more important than the absolute numbers.

Table 5.5 Expenditure per student (pre-, primary and secondary) per department, 2008 (BOB)

Department	Amount of students ²⁰⁷	Exp Departments ²⁰⁸	Exp Municipalities ²⁰⁹	Bono Juancito Pinto ²¹⁰	Evo Cumple	FPS	HIPC	Total exp per student	student /teacher
Chuquisaca	165.907	1.109	272	200	8	62	15	1.667	23
La Paz	742.643	1.656	320	200	11	70	15	2.273	24
Cochabamba	499.031	1.398	269	200	15	16	15	1.914	28
Oruro	128.952	1.235	434	200	8	22	15	1.914	21
Potosí	241.936	1.318	165	200	15	15	15	1.728	21
Tarija	129.786	701	1.005	200	-	-	15	1.922	25
Santa Cruz	729.406	1.177	147	200	1	2	15	1.542	32
Beni	136.226	1.114	250	200	13	64	15	1.657	24
Pando	24.021	1.441	649	200	53	54	15	2.411	25
Average	310.879	1.239	279	200	16	38	15	1.892	25

Source: PADEP-GTZ: Laboratorio Fiscal; Ministerio de Economía y Finanzas Públicas (2009)

²⁰⁶ Pre-primary, primary and secondary education for public schools.

²⁰⁷ Including salaries.

²⁰⁸ Including school breakfasts provided by all municipalities for primary schools and often also for students in pre-primary and secondary school. The costs for the breakfasts are on average a little more than 1 boliviano per pupil (with large variations). These breakfasts are most often financed with own resources and in kind contributions of parents, with support of NGOs in some of the municipalities. Source: FAM-BOLIVIA (2008), El desayuno escolar en Bolivia Diagnóstico de la situación actual.

²⁰⁹ The school grant was initially for grades 1 to 5, but was later extended to grades 1 to 8. To be precise, this should be taken into account when linking the 200 bolivianos to students from pre-primary, primary and secondary. However, such adjustment would not make a big difference to the distribution between departments.

Two different studies of the distribution of public resources for education within Bolivia have also pointed out the large variations in expenditure per student per year between different departments, even when corrected for differences in costs of providing education services throughout the country.²¹⁰

National transfers are not used to correct for differences between municipalities in terms of quantity and quality of education infrastructure and related services, or differences in the costs of providing education services (e.g. due to dispersed communities). Such differences exist partly due to priorities of municipalities themselves but also due to backlog in investments in some rural, more remote, municipalities, often those with less capacity to generate own resources.²¹¹ As a result, the current allocation of national resources leads to inequity in public expenditure on education.

Though in 2000 a law was passed that required both government and external donors to take the poverty of the population into account, none of the transfers in the education sector, even for direct benefits like *Juancito Pinto*, are currently linked to poverty indicators.²¹² However, the Popular Participation law established some allocation principles for municipal expenditure, for example prioritising rural areas, which promote expenditure in disadvantaged areas. Moreover, through the process of participative planning (also part of Popular Participation) specific, local problems in municipalities are taken into account. In this way, decentralised education expenditure has the potential to promote equity even without explicit poverty-based allocation mechanisms.²¹³

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Household expenditure

Of course, as in other countries, households spend on education as well. The Constitution of Bolivia states that all people have a right to free education.²¹⁴ Nevertheless there are costs associated with school-going children, especially for school books and materials, transport, uniforms and photocopies. On average, households contribute 20 % of total national expenditure on public education (estimates based on 2005 household survey).²¹⁵ Urban households spend more on education than rural households as a percentage of their total

²¹⁰ The estimates for the differences in costs of providing education services are adjusted in Finot, I. y M. Zapata (2007), *Análisis de equidad sobre la distribución de los ingresos públicos y el gasto social territorial en Bolivia*. This is not the case in Nina, O. (2006), *La educación Inicial, Primaria y Secundaria en el marco de la descentralización: Contexto y perspectivas*. Though the methodologies, timing and underlying data differ, the conclusions are roughly similar.

²¹¹ Nina, O. (2006), *La educación Inicial, Primaria y Secundaria en el marco de la descentralización: Contexto y perspectivas*; UDAPE-UNICEF (2006), *Bolivia. El Gasto de los Hogares en Educación; FAM-BOLIVIA (2008), El desayuno escolar en Bolivia Diagnóstico de la situación actual*.

²¹² Government of Bolivia (2000), *Ley 2235 de Diálogo Nacional, Artículo 12 (formula based on census data and basic needs assessments) and 17 (Política de Compensación)*. The law also included a register for all external financing, in order to level out income of departments. Unfortunately, neither the poverty-based allocation nor the register were implemented. Only FPS used a poverty-based allocation rule, but only until 2006.

²¹³ Nina, O. (2006), *La educación Inicial, Primaria y Secundaria en el marco de la descentralización: Contexto y perspectivas*.

²¹⁴ Alinea 2 of Article 81: 'La educación fiscal es gratuita en todos sus niveles hasta el superior'

²¹⁵ UDAPE-UNICEF (2006), *Bolivia. El Gasto de los Hogares en Educación*.

expenditure, but on average the expenditure on education amounts to about 6.5 % of the total expenditure of households (following 53 % for food and 18 % for basic services).

According to the 2005 household survey, 77 % of the student population in first to fifth grade of public primary schools lives in poverty (70 % in urban areas and 84 % in rural areas). For those families, the private expenditure on education by households, even if education itself is provided for free, can be significant. Programmes such as the provision of school breakfasts and the grant, *Bono Juancito Pinto*, are implemented by government (with domestic resources) to stimulate the access and retention of students from poorer families by reducing the financial burden on households. However, it is important to note that both initiatives are not targeted at the poorer households or areas.²¹⁶

5.3 External financing education sector

Education in Bolivia is primarily funded with domestic resources. According to UDAPE, between 2000 and 2005, domestic resources accounted for 91 % of the total education expenditure, whereby the remaining 9 % external resources consisted of credits, grants and resources generated through HIPC II.²¹⁷ For education expenditure excluding tertiary education, the share of external funding is higher though, having increased from 6 % in 2000 to 13 % by 2005.

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According to data from the Vice Ministry Public Investments and External Financing (VIPFE),²¹⁸ Bolivia received USD 409 million official development assistance for the education sector as a whole over the period 2000 to 2009 (USD 251 million in grants and USD 157 in concessional credits). Of this amount, 16 % consists of technical assistance. The bulk of external funding for the education sector (69 %) is used at central level for funding the activities and programmes implemented by the ME.²¹⁹

The relative importance of external resources in the education sector has diminished over the evaluation period. On the one hand, the government has increased its own resources for the education sector (e.g. for the school grants *Bono Juancito Pinto*), and on the other hand external donors have reduced the funding for the education sector. The following figure is constructed by combining data from UDAPE with financial data from VIPFE, and shows the

²¹⁶ For example, with regard to the school breakfast, a study by FAM (2008) found that the quality of the breakfast (in terms of composition and nutritional elements) and continuity is higher in urban areas than in the rural areas. For instance, the municipality of La Paz has the support of nutritionists for the breakfast definition. In the rural areas the service is provided mostly by parents, while municipalities only assign a small amount of money based on the number of pupils. FAM-BOLIVIA (2008), *El desayuno escolar en Bolivia Diagnóstico de la situación actual*.

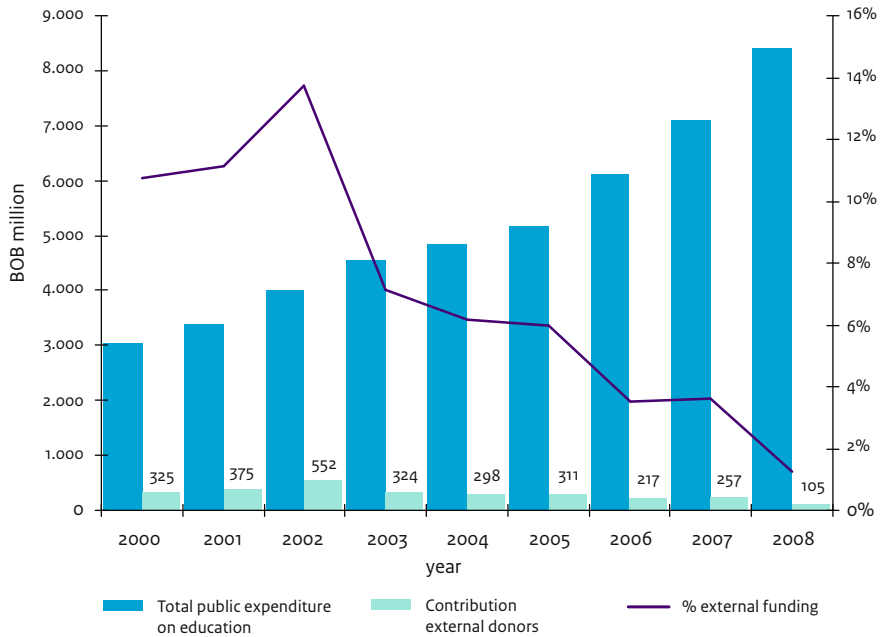
²¹⁷ Unidad de Análisis de Políticas Sociales y Económicas (2006), *Bolivia: Situación Actual y Gasto Público Social (GPS)*.

²¹⁸ Viceministerio de Inversión Pública y Financiamiento Externo (VIPFE). Data collected for the purpose of this evaluation (December 2010) from government information system (SISIN).

²¹⁹ VIPFE. Data collected for the purpose of this evaluation (December 2010) from Investments Information System (SISIN).

reduction in external financing as a percentage of the total public expenditure on education. It is important to note that the contributions of Cuba and Venezuela are not included in these data bases.

Figure 5.3 Contribution of external resources to total public expenditure on education (BOB million)



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The Netherlands was the main external donor over the evaluation period, followed by the World Bank and the Inter-American Development Bank. Together they accounted for 62 % of the external funding for the education sector (see table 5.6).

	2000	2009	Total 2000-2009	%
NL	2,7	8,3	97,2	24,0
World Bank	8,8	3,3	81,5	20,0
IDB	25,2	-	76,1	19,0
Sweden	4,0	-	35,9	8,8
JICA	6,5	5,6	22,2	5,4
Spain	0,9	8,4	21,3	5,2
Denmark	-	-	16,3	4,0
UNICEF	0,4	3,5	14,7	3,6
Germany, KFW	1,0	0,0	12,7	3,1
Germany, GTZ	-	-	10,1	2,5
EU	1,1	0,5	8,2	2,0
WFP	0,3	0,0	4,1	1,0
UNFPA	0,7	-	2,8	0,7
Other ²²²	1,0	1,3	6,1	1,5
Total	52,6	30,9	409,1	100,0

Source: VIPFE, Direction of External Financing.

However, the table depicted above does not include the support received from Venezuela and Cuba, amounting to more than USD 29 million (BOB 200 million) between 2004 and 2009.²²² These countries have jointly contributed to the education sector through a large alphabetisation programme (*'Yo sí puedo'*) and Venezuela has provided support for infrastructure (*'Bolivia avanza: Evo cumple'*).

As a percentage of the budget for the ME at national level, external resources have declined during the evaluation period from 53 % in 2001 to 26 % in 2009.²²³ This is mainly due to increased domestic expenditure, due to the implementation of large, national programmes such as *'Yo sí puedo'* (alphabetisation) and the grant-scheme *'Bono Juancito Pinto'*. Moreover, external resources have moved from recurrent expenditure to investment expenditure. The investment expenditure component is where the basket funding, including the contribution by the Netherlands, is provided²²⁴.

²²⁰ According to the Central Bank of Bolivia, the exchange rate used is 6,19 bolivianos per USD in 2000, and 7,07 bolivianos per USD in 2009.

²²¹ UNFPA, China, OPEC, Switzerland, COR, France, Japan, USAID, CAF, UNODC, UK.

²²² Converted at current exchange rates (7,15 bolivianos per USD April 2011)

²²³ VIPFE. Data collected for the purpose of this evaluation (December 2010) from Sistema de Información sobre Inversiones (SISIN).

²²⁴ As illustrated in Figure 3.1., the investment budget component does include expenditures that are strictly speaking recurrent expenditures (e.g. ME staff). The ME maintains its own system for assigning expenditures to both categories, whereby the basket funds focus on what falls under the investment component.

	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total expenditure²²⁷	336	297	244	286	434	341	783	1.065	1.025
% external funding	53%	56%	61%	67%	77%	78%	19%	24%	26%
Investment expenditure (Focus Basket)				141	112	196	104	221	180
% external funding				71%	87%	94%	65%	79%	92%
Recurrent expenditure				145	322	145	679	844	845
% external funding				64%	74%	56%	12%	9%	12%

Source: Ministry of Education (December 2010), own calculations

The table provides evidence of how, the Ministry's overall dependency on traditional donors such as those within the *Canasta* (including the Netherlands) or the World Bank has been reduced during the evaluation period. However, new donors such as Cuba and Venezuela nowadays play an increasingly important role in the country, including the education sector. Moreover, though the share of domestic resources has increased significantly, it is important to note that for a large part this is dependent on rather volatile, unpredictable resources. As such, revenue is variable, while expenditure based on this revenue is inflexible. For example, the *Bono Juancito Pinto* and hiring of new teachers is currently financed from the receipts from hydrocarbons (petroleum and gas), which depend on the world economy and the capacity to extract this non-renewable energy source. Moreover, from the start of the *Reforma* and during the evaluation period, the Ministry has been dependent on external resources for the financing of some crucial components of the education strategy, such as curriculum development, and key staff in the Ministry. Analysis of the data provided by the VIPFE shows that while the salaries of political staff (e.g. minister, vice-ministers), administrative and support staff are paid by the Treasury, the salaries of the majority of the technicians are paid by external funds.²²⁷

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5.4 Conclusions

The Netherlands considered the process of decentralisation in the education sector as a way to improve the efficiency and quality of education. However, the document review and

²²⁵ The data in this chapter differs from the most recent joint evaluation of the POMA (HIFAB, 2010), which focuses on the basket funding to the ME. That is only part of the external funding to the Ministry.

²²⁶ This is only the expenditure of the ME at central level. Compared to table 5.3, this excludes expenditure for national programmes (e.g. Bono Juancito Pinto, FPS infrastructure investments), expenditure on education by other Ministries (e.g. Ministry of Labour), and tertiary education.

²²⁷ This issue is not new. It has also been noted by the World Bank (2006), *Cómo se gasta el dinero público. Actualización*, and again by Jiménez, W. & M. Vera (2010), *Indigenous Population and Differences in Access to Primary Education in Bolivia*.

interviews point out that the decentralisation process has remained incomplete (i.e. deconcentration), with centralised decision making and a limited role of subnational entities in the education sector. This limited the capacity at decentralised levels, which seems to have impeded the implementation of education policies and reforms at school-level (e.g. locally relevant curriculum). It remains to be seen how the recent changes in approach, the new education law and the legal framework for Autonomies (*Ley Marco de Autonomías*), will address these issues.

Popular Participation is another key issue of the *Reforma* that was supported by the Netherlands. In particular, the Netherlands has been supporting the CEPOs, which have been successful in the promotion of intercultural and bilingual education. However, they will need to address the sustainability of their organisation and their role in current political circumstances. Other aspects of Popular Participation have been partial successes, such as the school councils (*juntas*) that provide useful services in schools (e.g. school breakfasts, monitoring teacher attendance), but have a limited role beyond that.

Public expenditure on education in Bolivia has grown during the evaluation period in absolute terms. Primary education has received the bulk of education resources. Different studies point out wide variations in public education expenditure per student throughout the country. The allocation of public resources is not targeted at the poorest population groups: there are no poverty-based allocation criteria or mechanisms to correct for differences between municipalities.²²⁸ A public expenditure tracking study, which looks at the distribution of expenditure in education, would be useful to inform policy development in Bolivia.

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The Netherlands has been the single largest donor over the evaluation period (24 % of total external financing in the education sector). Very recently, however, concerns have been raised about the dependency of the Bolivian government on external resources for the education sector (HIFAB, 2010). Yet the analysis for this evaluation concludes that external resources are actually diminishing as a percentage of total resources for the education sector as a whole, including subnational levels. Since 2006, domestic resources have increased exponentially, mainly due to income from hydrocarbons, which changes the significance of donor contributions.

Nevertheless, given that external resources account for 81 % of the investment expenditure of the ME at central level, it remains true that the ME is dependent on external resources for the financing of education reforms and crucial technical staff (e.g. curriculum development and institutional strengthening). Moreover, the prosperous fiscal situation of the past few years might have come to a turn with a rising fiscal deficit, caused by lower income from hydrocarbon combined with high government expenditure and increasing inflation.

²²⁸ Actually, not only to correct differences with regard to poverty, but to address the diversity in educational services required given the social, economic and demographic diversity of Bolivia.

6

Education access and quality

This chapter informs the evaluation of the effectiveness of the Dutch contribution to the education sector in Bolivia. It discusses the evidence of the effects of the education reforms and policies supported by the Netherlands, focusing both on educational *quantity* and *quality*. The former measures the extent of contact individuals have with the educational system, while the latter measures the skills they actually gain through that contact. Unfortunately, it is not possible to identify the determinants of changes over the evaluation period, and thus link education reforms to outcomes in a causal sense. Nevertheless, this chapter does describe the evolution of educational quality and quantity and provides suggestions on how to improve this information gap in the future.

6.1 Quality

Educational quality can be measured in different ways.²²⁹ The most basic measure, and most often used, focuses on quality as output and measures learning achievements using standardised exams, typically in language and mathematics. Unfortunately, even this basic, quantitative measurement is lacking in Bolivia for most of the evaluation period.

Specifically, between 1996 and 2000, SIMECAL undertook language and mathematic tests for different grades, in some instances with a nationally representative sample. Moreover, in 1997, Bolivia participated in the international tests of Latin American Laboratory for the Assessment of Quality of Education (LLECE). In 2000 SIMECAL discontinued the testing and was eventually closed by the ME in 2004.

Thereafter, the Observatory of Educational Quality (OCE) was established with a similar mandate to SIMECAL. After a turbulent start,²³⁰ Plurinational Observatory of Educational Quality (OPCE) undertook a pilot test in 2010 with funding from UNICEF.²³¹ According to officials from OPCE, the hold-up in undertaking tests reflects the delays in developing the new education law and curriculum. Given the complexity of designing, implementing and processing nationally representative tests, this should not be expected before 2012 or even 2013 (as confirmed by OPCE).

This process illustrates how little priority successive governments and ministers of education have given to the monitoring and evaluation of educational quality in Bolivia, even as a clear consensus has emerged that low quality is the central challenge facing educational sectors worldwide.

²²⁹ Courtney (2008), *Do monitoring and evaluation tools, designed to measure the improvement in the quality of primary education, constrain or enhance educational development?* In: *International Journal of Educational Development*, 28, 546-559; Adams (1998), *Defining Educational Quality: Educational Planning*. In: *Educational Planning*, 11 (2), 3-18

²³⁰ In short, OCE was first established after the abolishment of SIMECAL in 2004, with the intention of also covering education inspection, but closed again in 2007. The current OCE has been installed in 2010.

²³¹ Unfortunately, the results of the pilot could not be included in this evaluation. However, preliminary findings confirm the conclusions of the evaluation (in particular on low levels of learning).

As a result it is impossible to determine with certainty how quality has evolved, or what has been the impact of the expenditure by the Bolivian government and donors in the education sector. This would be perhaps less worrying if quality had been relatively high at the last measurement,²³² or if there were enough research from other sources, such as universities, providing evidence on the issue. Unfortunately this is not the case, as will be discussed hereafter.

Between 1996 and 2000, SIMECAL undertook annual evaluation reports, which also included analysis of the determinants of differences in achievements of students. The last tests in 2000 could be used as a baseline for evaluating quality of education. According to the report by SIMECAL, published in 2004, 66 % of students in the third grade of primary school scored sufficient or good in language tests (Spanish), but only 27 % did so for mathematics. More importantly, according to the report, schools that had not yet been reached by the *Reforma* did not show a significant difference with schools that had benefited from the reforms.²³³ The report identified the following factors that influence the learning achievements:

- pre-primary education;
- support to families;
- schooling not combined with working;
- pedagogical methods and resources, such as module and group work, teaching in maternal language, trained teachers;
- expectations of parents about the continuation of education by their children (determinants of achievements in secondary).

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Despite a very active community of education experts and researchers in Bolivia, there is no research that evaluates education quality, its development and determinants for the country as a whole.²³⁴ There are, however, small-scale studies on the quality of education, which can be used as illustrations of the current situation.²³⁵ As described above, the EKN has provided financial support for several of these studies, among which through its support to PIEB.²³⁶ In the fall of 2011, another series of publications on the education sector are expected as part

²³² For example, the regional comparison conducted in 1997 (LLECE, 2001) concluded that while the quality of education in Latin America was generally low, and low compared to the rest of the world, Bolivia scored among the lowest (together with Honduras and Peru). Source: Pritchett, L. (2003), *Educational Quality and Costs: A Big Puzzle and Five Possible Pieces*, mimeo.

²³³ SIMECAL, 2004, *La educación en Bolivia. Indicadores, cifras y resultados*. Ministerio de Educación.

²³⁴ In 2004, Contreras and Talavera came to the same conclusion that it was impossible to assess the implementation of the pedagogical and curriculum reforms at the school level, which warranted a in depth quantitative and qualitative study. Source; Contreras, M.E. y M. L. Talavera (2004), *Examen parcial. La reforma educativa boliviana 1992-2002*, 144-145.

²³⁵ Another interesting recent study was undertaken by the Universidad Católica Boliviana, Departamento de Cultura y Arte (2010), *Diagnóstico 2010 Pensamiento Crítico* (forthcoming). The study assessed the basic writing and reading skills among 671 students of this university in the first year of university, i.e. those who had their basic education during the evaluation period. The study concludes that in general the competencies with regard to language are low and insufficient for the requirements of academic studies.

²³⁶ PIEB – Servicio Informativo Especializado en Investigación, Ciencia y Tecnología, http://www.pieb.com.bo/pieb_sobre.php.

of the of ‘100 years of education’ research programme of PIEB. These studies are expected to contribute to the evidence of the current state of learning in Bolivia, and thus influence policy.

Box 6.1 *Rural education, the case of Chuquisaca, Bolivia*

One of the PIEB studies on education in Bolivia is partly based on an explorative study for field research on coping mechanisms of populations in rural areas in Chuquisaca (*Pied Andino II*), commissioned by IOB in 2010.²³⁸ Unfortunately, this study could not be further expanded within the scope of the evaluation. Nevertheless, the explorations provide some interesting insights into the experience at classroom level in several communities in one of the nine departments in Bolivia.²³⁹ This is obviously not representative for Bolivia as a whole; however, the department is illustrative for many of the country’s challenges in the education sector.²⁴⁰

This preliminary study confirms the finding discussed elsewhere in the evaluation that the *Reforma* is no longer practiced:

- Deconcentration of education sector management to municipal level has brought the education authorities closer to the communities and schools. Municipalities play an important role with regard to infrastructure and school feeding. However, the SEDUCA in Chuquisaca remains a mere implementing body for the ME at national level, with responsibility for human resources and statistics.
- The number of unqualified teachers (*‘interinos’*) has been tackled through a government programme. However, since 2005, teacher training and development by government has been limited in the past years, and has been taken up by private initiatives (NGOs).
- As a result, there seems little left from the *Reforma’s* modernization of the education practice: thematic learning corners, transversal themes and text books are often in disuse.

²³⁷ Yapu, M. (2011), *La educación rural en Chuquisaca 1996-2010. Elementos para futuras investigaciones. Proyecto 100 años de Educación en Bolivia*. Based on: Dulon, R. et al. (2010), *Investigaciones sobre estrategias campesinas en comunidades rurales del norte de Chuquisaca y Potosí – Bolivia Pied Andino – 2010. Cambios identificados a nivel municipal, comunal y familiar – efectos en las estrategias de vida y desarrollo campesinas*. The research was coordinated by Roxana Dulón in collaboration with Zulema Ramos and Geke Weenink.

²³⁸ Municipalities of Yotala, Yamparáez, Tarabuco y Mojocoya, and communities and schools of San Juan, La Cañada, Escana, San José del Paredón, Talahuanca, Pampa Lupiara.

²³⁹ Chuquisaca is a department in the centre south of Bolivia, with as its capital the city Sucre, also the constitutional capital of the country. The department has 56% of rural population. Chuquisaca is one of the poorest departments. There has been a general but uneven increase in access to social services but quality remains a problem. The main languages are Spanish and Quechua.

- With regard to the curriculum, only the national curriculum has been implemented. The locally-specific part has not been prioritised, and lacked technical-pedagogical support and training for it to be rolled-out at municipal level.
- Intercultural and bilingual education (in this area with Quechua as first language) remains a sensitive issue. On the one hand it does recognise the cultural diversity of the country (e.g. in the community of *San José del Paredón* in the *Municipio de Tarabuco*). However, on the other hand, the diversity is also associated with processes of discrimination and disadvantage. As a result, parents have opposed Quechua as first language, e for socio-economic rather than pedagogic reasons. Due to the lack of teacher training, this sentiment has not been countered by good practice and effective learning in the classroom.
- School councils (*juntas*) play a larger role since the *Reforma* (closely linked to the agricultural syndicates), but mainly through services (infrastructure, breakfasts) and control of teacher attendance (as they did *pre-Reforma*). In one community the *juntas* are actively persuading parents to send their children to school.
- The *Bono Juancito Pinto* and school transport are perceived to contribute to school attendance, but cannot mitigate the effects of migration. This is evidenced, for example, by high drop-out in secondary education, despite improvements made to the quality of education at that level (e.g. use of specialised teachers).

The study concludes with the finding that the main function of schools in this particular area is to ‘*castellanizar*’ (to ‘Spanish-ize’) and facilitate migration, by preparing a way out and the means to tackle urban life with improved living conditions.

Another useful study is the evaluation of the *Escuelas de Calidad* (Quality Schools) by Plan International. This programme is co-financed by the EKN since 2007.²⁴⁰ The evaluation is of Plan International’s programme, but is informative for this evaluation because the schools of the programme are compared with public schools which were not part of the programme.

²⁴⁰ Initially the financing of Plan in Bolivia was originated from the central Ministry of Foreign Affairs in The Hague through the Dutch NGO Plan (2005-2009). Since 2007, the Plan International in Bolivia is directly funded by the Embassy of the Netherlands in Bolivia.

Box 6.2 *Impact evaluation of Quality Schools (Escuelas de Calidad)*

The programme aims at facilitating access to quality education for children and youths between 6 and 14 years old in rural areas. The focus is on public primary education, with particular attention to education management, through work with the municipalities. The programme is implemented in 62 schools in 39 municipalities, in 6 departments, covering more than 35,000 children, their families and communities. The municipalities in which Plan started the programme had lower coverage and completion rates compared to the rest of the country.

In 2010, an impact evaluation was conducted to assess the effect on the quality of education and learning of children in schools of the Quality Schools programme.²³⁵ The impact was measured using three indicators: School Quality Indicator (ICE), test results for language and for mathematics.²³⁶ The impact evaluation did not only measure progress over time between 2004 and 2009, but also tried to measure the specific impact of Plan's programme by using a comparison group of schools that had not benefited from the programme. The progress made by these schools can be interpreted as an indication of the progress made over the past few years in schools in rural areas in six out of the nine departments, due to socio-economic changes, but possibly also due to country-wide government policies addressing quality of schooling. The impact evaluation can unfortunately not be used to identify the most significant determinants of change.

According to the impact evaluation, the quality of schooling, measured by the ICE, has increased between 2004 and 2009. While in 2004, only 0,76% of schools were considered as having a 'high' ICE, in 2009, 35,67% qualified. Plan made a 'moderate' contribution, accounting for 4% of the improvement, whereby the schools assisted by the programme had higher ICE scores in 2009 than others. For the language and mathematic tests, scores increased in both the programme as the control group, though much more for language than for maths. So while in 2004, the language (maths) test was passed by only 15% (16%) of the students, in 2009 this was 55% (25%). Plan's programme made a 'significant' difference, i.e. the scores increased more than in the control group.

However, the evaluation also points out that, girls score much lower than boys. Though gender equity in access to education has improved even in rural areas, this does not automatically imply that all gender barriers have been removed (e.g. demands of household work, early pregnancies).

²⁴¹ Saberes & Territorios (2010), Evaluación Final Proyecto 'Escuelas de Calidad/ Estrategia de Núcleos Catalizadores' de Plan Internacional Bolivia.

²⁴² The ICE is a composite indicator, measuring among other inputs (equipment, teacher characteristics), processes (methods, participation) and perception on utility. The tests were conducted among children at the end of the first and second cycle of primary education.

Apart from the participative implementation of Plan's programme, stakeholders mentioned a favourable social and institutional context as having made a difference (e.g. less social conflict in the municipality, additional resources invested by and education policies of departments).

6.2 Quantity²⁴³

There is substantially more data on educational quantity in Bolivia. Despite this fact, measuring educational quantity or access during the period of interest is still complicated.²⁴⁴ This can best be explained by referring to a very common measure of quantity: the net enrolment rate. The net enrolment rate is equal to the ratio of the number of children of a certain age that are enrolled and the total population in that age group. Generally, the numerator for this measure comes from administrative data (from the ME), while the denominator is based on population projections from the government's statistical office (in Bolivia this is the National Institute for Statistics (INE)).

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In the Bolivian context, a first complication arises because - and this is certainly a positive development - the collection procedure for administrative enrolment data has changed. Previously the procedure was that school principals sent reports to the district management (at municipal level), which in turn relayed them to the departmental education offices (SEDUCAs), which sent them on to the ME. There had always been a suspicion that this procedure led to overestimation of enrolment, since each principal's declaration influenced the number of teachers his or her school was assigned by the ME.

In 2006 the unique student register (RUDE) was installed, whereby the information began to be gathered directly from the students and their parents via a questionnaire with a unique identification for each student.²⁴⁵ This system offers the possibility of eventually following students through the system. Additionally, the RUDE questionnaire provides other useful information on, for example special needs, family background, maternal language and socio-economic characteristics of the household. The implementation of the RUDE therefore causes a break in net enrolment rate series calculated with administrative data. Besides, the RUDE experienced some start-up problems,²⁴⁶ which additionally reduces the

²⁴³ This section is based on the report containing the analysis of household surveys, which will be made available by IOB separately. Urquiola (2011), *Calidad y cantidad educativa en Bolivia: 1996-2010. Informe preparado para el Ministerio de Relaciones Exteriores de Holanda*

²⁴⁴ Moreover, it needs to be stressed that enrolment is only the first step. Children might have access to school, but they need to remain in the school system as well, complete their education and receive education that is relevant and of good quality.

²⁴⁵ This registration was also used for the administering of the school grants, Bono Juancito Pinto, and thus provides several more opportunities for verification than did the previous procedure.

²⁴⁶ Discussions with the Ministry's technical staff and reports from the national press highlighted for example concerns about the confidentiality and use of the RUDE data. This will have to be addressed in order to improve the data base.

comparability of the data in 2006, 2007 and 2008. According to the Ministry's technical staff (SIE, UDAPE) the data in 2009 and 2010 have reached the required standards.

Though clearly a positive development,²⁴⁷ the implementation of the RUDE can therefore lead to erroneous conclusions regarding the evolution of enrolment in Bolivia. For example, the recent joint donor evaluation of the support to the POMA (HIFAB, 2010), argues on the basis of absolute enrolment data from government sources (SIE) that there has been an 'alarming reduction in enrolment'.²⁴⁸

However, it is possible that in reality enrolment has not changed much, and that the decline observed (particularly in year 1 and rural areas) reflects the impact of the implementation of RUDE. Given the described difficulties in using administrative data to follow educational quantity of over the past 10 years, in this evaluation household survey data are used instead to calculate the net enrolment rates.²⁴⁹

As with any source of data, there are methodological issues with the household surveys, but the benefits are twofold: 1) both the numerator and the denominator in a net enrolment calculation come from the same source of data, and 2) the data are comparable between 1996 and 2009.²⁵⁰ However, because of the small sample of the household surveys compared to the census such as the RUDE, the results should be interpreted as estimations rather than exact data points.

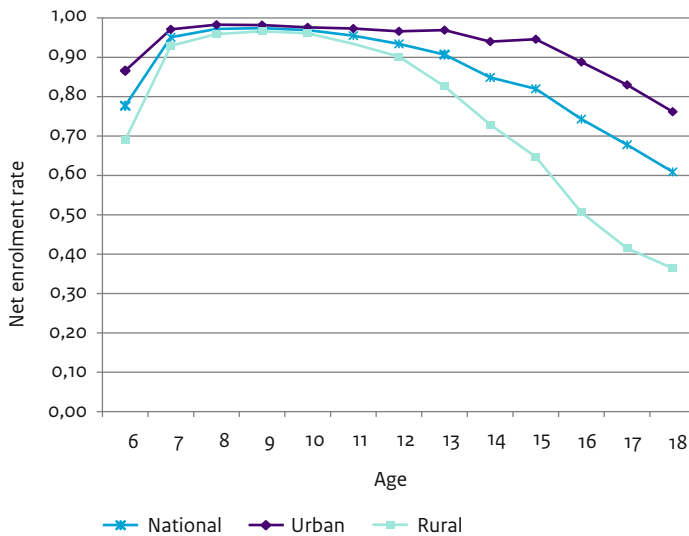
As a baseline, the following graph shows the net enrolment rate in 2000 for the country as a whole and for the rural and urban areas specifically.

²⁴⁷ There are also complications with the denominator, the population projections by INE. The last population census dates from 2001, so that disaggregated population projections are increasingly unreliable especially in a country like Bolivia with high birth rates and significant internal migration flows. Technical staff from the Ministry have confirmed this concern, which will be addressed in 2011 with a new Census.

²⁴⁸ HIFAB (2010), Evaluación del Programa Operativo Multianual de Apoyo al Sector Educativo en Bolivia 2004-2009.

²⁴⁹ For a more detailed description of the Household surveys see: Instituto Nacional de Estadística, <http://www.ine.gob.bo/anda/>.

²⁵⁰ Household surveys certainly do not produce perfect comparability. Between years the education questions were posed slightly different. The enrolment data is self-reported by households, which could also lead to an overestimation. However, such problems are minor compared to the ones described above.

Figure 6.1 Net enrolment rates per age, 2000

Source: National household surveys, Instituto Nacional de Estadística.

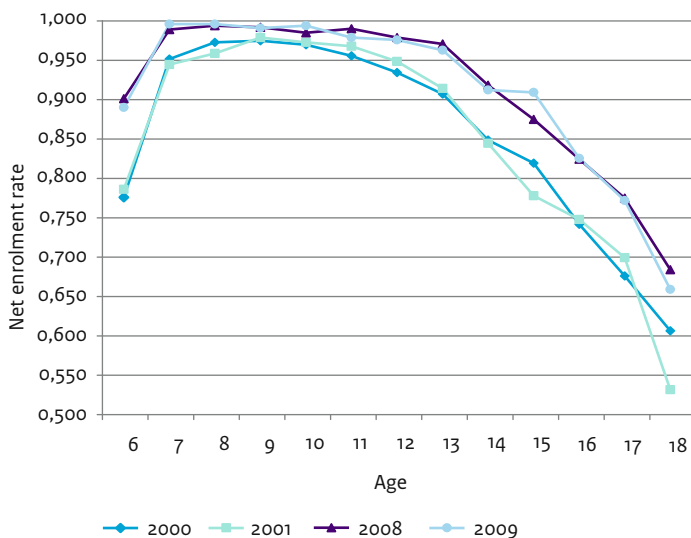
This graph points out three main issues in 2000:²⁵¹

1. Late entry: Children enter late into the school system. Parental self-reports suggest that 20 % of children aged 6 were not in school, rising to 30 % for rural areas.
2. High enrolment between 8 and 12: Between the ages of 8 and 12, enrolment rates were already high in 2000. In urban areas they exceeded 95 %.
3. Drop in enrolment from age 13: Enrolment rates begin to drop overall from age 13, in rural areas this happened earlier (already around age 11) and in a more accelerated way.

The next question is, how have enrolment rates evolved? The next graph shows the same as above, enrolment rate per age, for the earliest years we consider in this study (2000-2001) and the latest 2007-2009. This is visually clearer than presenting all the available years simultaneously. Moreover, household surveys are better suited to analyse developments over the longer term than in short, between-year periods, since year to year changes can be due to real developments but just as well due to statistical variation.

²⁵¹ In Urquiola and Calderón, (2006), Bolivia's performance along these dimensions is compared to that of other countries in the region. Bolivia's ranking varied with the age considered, but overall the enrolment rates were above countries with similar or even higher incomes such as Peru, Venezuela and Mexico. The issue of late entry was more acute in Bolivia while enrolment rates were higher in later age ranges. Source: Urquiola, M. y V. Calderon (2006), Apples and oranges: Educational enrolment and attainment across countries in Latin America and the Caribbean. In: International Journal of Education Development, 26.

Figure 6.2 Net enrolment rates by age, 2000-2009

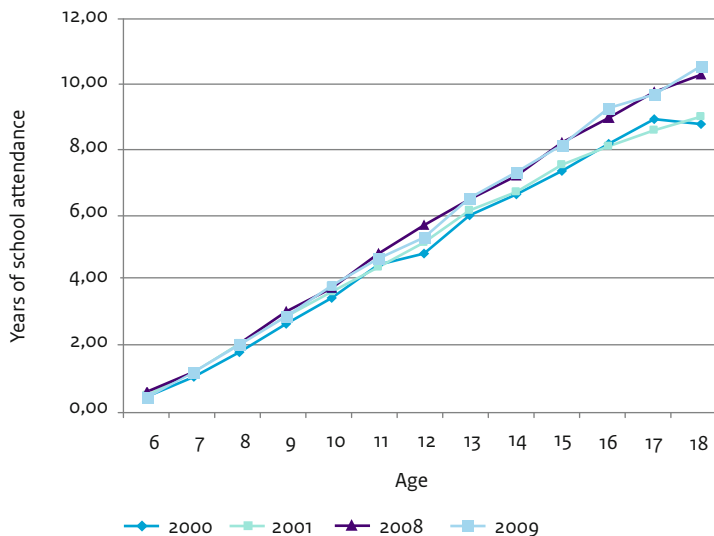


Source: National household surveys, Instituto Nacional de Estadística.

The graph illustrates that net enrolment rates have increased during the evaluation period. The last two series lie clearly above the first two series for all the age groups considered. Although the general age-related patterns remain the same, late entry has been reduced, enrolment rates have increased for ages 8-12, and more children are in school at higher age groups (e.g. ages 14-15).

Another measure of education quantity that is included in household surveys is the reported years of school attendance of different age groups over time. It is important to note that the reported years of attendance is the net effect of enrolment and repetition, so that it cannot be interpreted as an indicator of completion or schooling received (i.e. grades). However, as graph 6.3 shows it is clear that over the evaluation period children and youth have at least had an increasing amount of contact with the schooling system. For example, while 15 year olds had been on average about 7 years in school at the start of the period, this had risen to 8 by 2009. This could be related to the reduction in late entry.

Figure 6.3 Years of school attendance by age, 2000-2009



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Source: National household surveys, Instituto Nacional de Estadística.

Figures 6.2 and 6.3 clearly show how analysis based on the household surveys leads to different conclusions than those using the administrative data, as in the joint donor evaluation.²⁵² Net enrolment rates have definitely not dropped ‘alarmingly’ during the evaluation period or in the past few years. This is not surprising given that during these years Bolivia has experienced economic growth and implemented measures to promote access to education.

²⁵² HIFAB (2010), Evaluación del Programa Operativo Multianual de Apoyo al Sector Educativo en Bolivia 2004-2009.

6.3 Equity in access

The aggregate figures disguise differences between population groups, which are important in Bolivia. For example, though the average years of schooling have increased by about one year over the past ten years in both rural and urban areas, in rural areas non-indigenous children have gained two years between 2000 and 2008, while indigenous children gained one year.²⁵³ Another analysis of the household surveys concludes that between 2002 and 2008, the gap between enrolment in primary education of indigenous and non-indigenous students has diminished but that the gap remained greater for older age groups, suggesting more discontinuation of education for indigenous students. Indigenous children from poor, rural households are particularly vulnerable.²⁵⁴ Unfortunately, this phenomenon leads to a perpetual cycle of poverty and lack of education as research has shown that income inequality in Bolivia can be explained to a large extent (between 20 % to 28 %) by differences in schooling. Overall, income increases with education in Bolivia but it does more quickly and at a higher level for non-indigenous people.²⁵⁵

Given the above described difficulties, equity in terms of differences in educational quantity could only be evaluated using the household surveys 1996-2009. Unfortunately, these surveys cannot produce as much geographically-specific details as the administrative data produced by the ME (e.g. comparing different departments or municipalities).²⁵⁶ Analysis on the basis of population groups is hindered by changes in classifications over the years (e.g. identification on the basis of language or self-reporting of identity). However, the household surveys do allow distinctions by gender and rural and urban areas. The latter is particularly interesting since it provides a very rough proxy for income, whereby the income in rural areas is on average significantly lower than in urban areas.²⁵⁷

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Graph 6.1 illustrated that education quantity is higher in urban areas than nationally for all different age groups. The graph shows that during the evaluation period the lowest net enrolment rate in the urban areas has never been below 75 %. Still, there has been some increase in the enrolment rates over the past ten years, though not so for older age groups.

²⁵³ UDAPE (2010), *Dossier de estadísticas sociales y económicas. Series históricas sistematizadas de las principales variables económicas y sociales a partir de 1980 - 2009*, Vol. 20

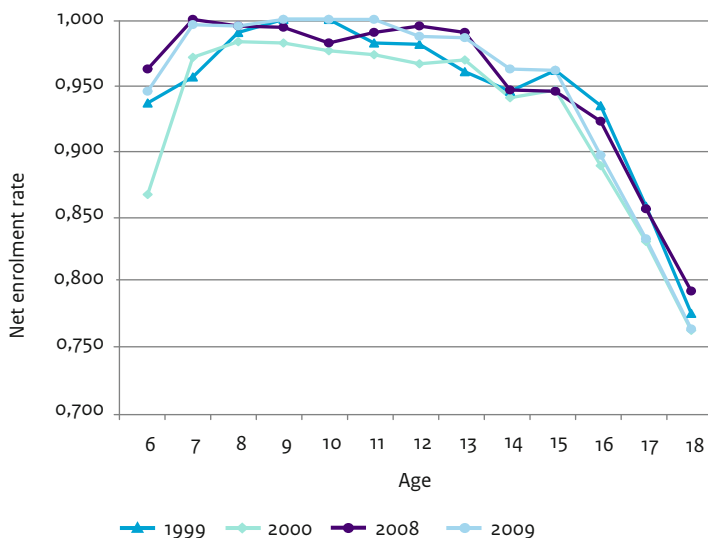
²⁵⁴ Jiménez, W. & M. Vera (2010), *Indigenous Population and Differences in Access to Primary Education in Bolivia*. Indigenous is defined as having as mother tongue or currently speaking an indigenous language.

²⁵⁵ On the basis of 2000 data. Gray Molina and Yañez (2010). Difference in schooling is followed by differences in occupational category (between 12-16%), which is closely related to education as well (employability and returns to education). Another indicator of the way in which education can open up possibilities is the finding that migrants in Bolivia are more educated than non-migrants.

²⁵⁶ Only since 2003 is there a disaggregation per department, before that it was per region or with certain department combined (Beni and Pando). See: Instituto Nacional de Estadística, <http://www.ine.gob.bo/anda/>.

²⁵⁷ Urban refers to capital cities of departments, El Alto and population centres with more than 2000 inhabitants. Rural refers to all other areas.

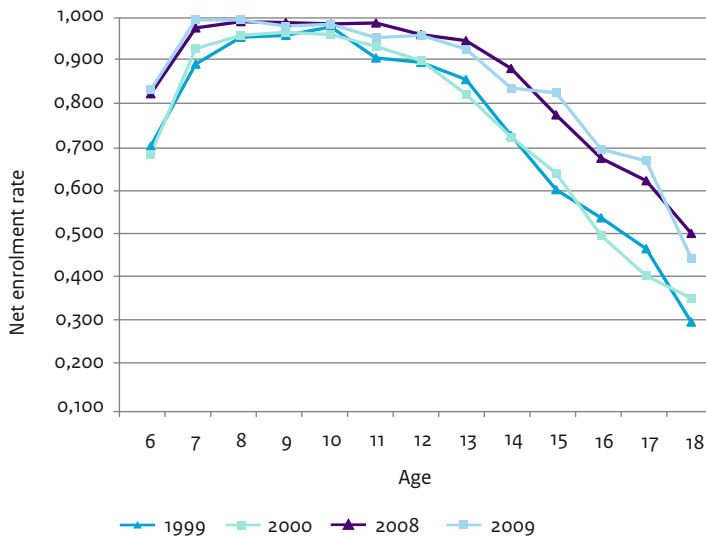
Figure 6.4 Net enrolment rates per age, urban areas, 1999-2009



Source: National household surveys, Instituto Nacional de Estadística

The already high enrolment rates in urban areas, combined with the evidence of increased quantity in figure 6.2, suggest that the most substantial increase in educational quantity occurred in rural areas. The next graph illustrates that indeed the enrolment rates in rural areas are much lower than in urban areas, but also that there has been a significant increase in rural enrolment in the past ten years. For certain years, the increase is more than 20 percentage points (age 15). Both late entry and school leaving after age 12 still exist but less so than at the start of this millennium. The earlier age of school leaving might well be connected to the limited availability of rural schools offering courses beyond the fifth cycle of primary education.

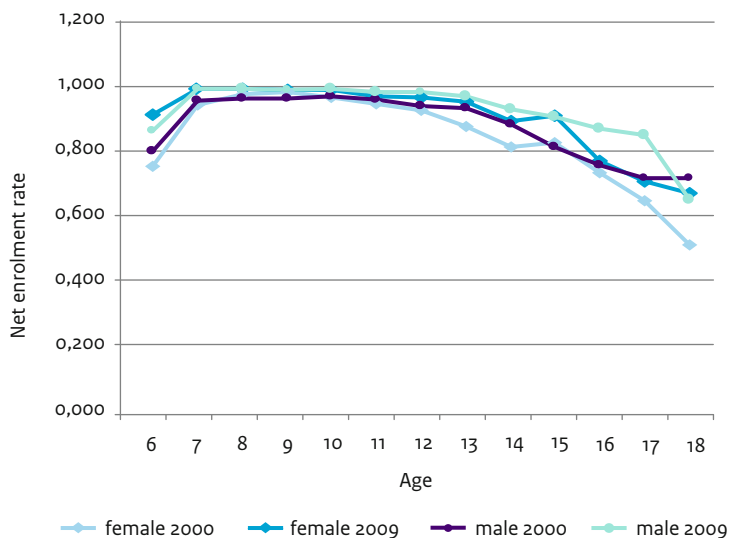
Figure 6.5 Net enrolment rates per age, rural areas, 1999-2009 (note change of scale)



Source: National household surveys, Instituto Nacional de Estadística

Concerning gender, the following graph illustrates how access to education has increased for both girls and boys. At early ages, between 6 and 11, there was already little difference in net enrolment rates in 1999, and this is still so in 2009.²⁵⁸ The net enrolment rates for boys remain slightly higher than for girls, though the gap has diminished significantly.

²⁵⁸ National figures disguise regional differences. According to the report on progress towards the Millennium Development Goals, UDAPE (2008), notes differences between departments (for example in Potosi, Oruro and Chuquisaca, the poorest departments, the gender gap is the largest). Source: UDAPE (2008), Informe de progreso de los Objetivos de Desarrollo del Milenio.

Figure 6.6 Enrolment rates per age and gender, 2000-2009

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Source: National household surveys, Instituto Nacional de Estadística

It seems that at certain ages, girls' net enrolment is higher than the net enrolment rate for boys. However, given the small sample of household surveys and the margin of error in the estimations, strong conclusions on these results would be premature. Then again, a small gender gap in enrolment is relatively common in Latin America (unlike other countries with similar income levels elsewhere in the world).²⁵⁹ However, data aggregated at national level disguises differences in enrolment between girls and boys in specific population groups or geographical areas. Moreover, data on enrolment is less informative about possible gender bias experienced once in school, leading to higher drop-out rates and discontinuation of education. That the latter might be an issue seems to be implied by the higher gender gap at older age groups.

6.4 Conclusions

Due to lack of data, it is impossible to evaluate the development of quality of education in Bolivia over the past ten years. The implementation of standardised tests, and participation in international comparisons, took place only between 1996 and 2000. From the existing data it is clear that the quality was relatively low in 2000.

²⁵⁹ Already in 2002, UNESCO reported that Latin America was unique in that girls often even had an advantageous position with regard to school education. However, the report also noted that gender bias remained evident, especially in rural areas. Source: Evans, H. & G. Messina (2002), Gender equality in basic education in Latin America and the Caribbean: state of the art.

There are, however, small-scale studies on the quality of education, some of which have been funded by the Netherlands. These studies cannot be generalised to evaluate quality in Bolivia as a whole, but they can provide anecdotal evidence of the current levels of learning throughout the country. Together these studies paint a bleak picture of partial implementation of the *Reforma* and the negative impact of the ‘legislative limbo’ of the past four years (as discussed in chapter 2). Studies of NGO initiatives, among which Plan International, do provide some insights into the effects of small-scale interventions on quality and access to education.

For education quantity, the data availability is better, though here as well there have been changes that make it more difficult to evaluate the developments over time. Partially, however, this is due to a positive development: the introduction of the unique student register (RUDE) in 2006. Nevertheless, the change in data series has led to several publications, including by the Bolivian government but also in the joint donor evaluation, of an alarming drop in enrolment.

An analysis of educational quantity based on household surveys between 1996 and 2009 leads to a different conclusion: enrolment has risen during the evaluation period and did not drop significantly in recent years. This is the case for girls and boys, and even more so in rural than in urban areas. Nevertheless, late entry and increased drop-out from age 13 remains a challenge. Other research concludes that though the gap in access between indigenous and non-indigenous populations has been reduced, completion is still problematic, especially for indigenous students from poor, rural households.

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Further research is required to determine possible causes of these problems and the effectiveness of education policies in addressing these.²⁶⁰ For example, administrative data in combination with household surveys can be used to explore the evolution of enrolment at a much more geographically disaggregated level (e.g. municipalities). Where is more attention to access required? Do the shortfalls reflect a lack of good schools? Or a lack of teachers? Or a lack of demand? Such analysis will be most interesting when the results of the next census (expected for 2011) provide relatively accurate geographically-specific population estimates.

In general, evaluating the results of investments in the education sector requires prioritising data collection. Unfortunately, although the 2011 census will be very useful, recent developments cast doubt on the possibility that one will be able to follow educational quantity in even the rudimentary fashion undertaken here. Specifically, government has yet

²⁶⁰ This is a difficult exercise in any country, even with better data, because of the difficulty of constructing a counterfactual (‘what would have happened without’) for the evaluation in the case of country-wide implemented policies. However, for a description of the way in which sector programmes rolled out throughout the country can be evaluated, see: Elbers, C. et al. (2008), *Assessing Sector-wide Programs with Statistical Impact Evaluation: A Methodological Proposal*, in: *World Development*. This article suggest measuring impact on the basis of a representative sample of the target group making use of heterogeneous implementation of policies (e.g. differences between departments, in time). This methodology was also applied in other evaluations by IOB in Zambia and Uganda.

to publicly release the 2008-2009 household survey data (the analysis above was only possible due to special permission obtained via the Minister of Education). The household survey for 2010 was cancelled, and the realization of the one for 2011 is in doubt. Though household surveys are not the primary responsibility of the ME, it should be of concern to both the ME and the donors working in the education sector. It creates a risk that the educational sector in Bolivia will be unable to monitor educational quantity properly, besides not having been able to quantitatively measure quality for almost a decade. This is comparable to macroeconomic management without measuring inflation or GDP and creates an unworkable situation for the Ministry and donors alike. The Netherlands has the opportunity to play an important role in this respect as a major and well respected donor in the education sector.

7

Conclusions

7.1 General

The Netherlands has been appreciated as a stable and continuous partner of the ME during rather turbulent years. The commitment to the Paris Principles by the Netherlands, as the largest single donor, and the active role played in the basket funding, has stimulated increasing government ownership and promoted donor harmonisation, alignment and coordination.

In addition, the evaluation of the Dutch contribution to the education sector in Bolivia leads to one other main conclusion: even though recently it has been given more attention, there has been too little monitoring and evaluation of results throughout the evaluation period, both by the Bolivian ME as by the Dutch Embassy. The current programme is imbalanced between ownership and accountability. With the risk of sounding like a broken record, this conclusion will have to be repeated several times as it has consequences for every response to the evaluation questions on relevance, efficiency, effectiveness and sustainability.

The evaluation period (2000–2009) is characterised by political instability and unresolved conflict in the education sector, as well as in Bolivia as a whole. For example, only the current Minister of Education has been in office for more than a year. The implementation of the education reforms, supported by the Netherlands, has been hindered by this instability. The lack of progress with decentralisation and popular participation in the education sector limited the capacity of subnational education authorities, while at the same time the capacity of the ME was insufficient to realize reforms. The *Reforma* was only partially implemented between 2000 and 2005, and discontinued without replacement in 2006 until 2010. This is said to have perpetuated existing processes of exclusion and limited the relevance of education. Though access has increased in both rural and urban areas, for both boys and girls, the quality of education seems low as initial reforms have not been retained.

In such an environment, the sector-wide approach and adherence to the Paris Principles (e.g. government ownership, limited earmarking, non stringent conditions) should have been combined with more effective monitoring and evaluation of results. The monitoring that did take place focused on financial monitoring and has not been used effectively, for example by following up recommendations of audits or by linking commitments to progress. As one of the largest donors, and a respected partner of the ME and other donors, the Netherlands could have played a leading role in this area. For example, as part of the institutional strengthening of the ME, the basket, including the Netherlands, should have more strongly encouraged the Ministry to improve the monitoring and evaluation of education quantity, equity and quality. The funding of research by the EKN in the field of education quality has been important with regard to the monitoring of quality but insufficient still.

Due to time limitations, the evaluation has focused on the Dutch support to the ME, which amounts to 68 % the Embassy's education programme. However, it is combined with financing of local and international NGOs, and research in the field of education. This support to NGOs and research is complementary to the government support in that it either flanks the support to ME (e.g. enhancing participation in national education forum) or tackles problems that are insufficiently addressed in the government's education programme (e.g. TVET).

Recently, the new education law '*Avelino Siñani - Elizardo Pérez*' has been approved. The ME and its leadership have been stable in the past three years. Public expenditure on education remains high at 7% of GDP. Though there remain many conflicts to be resolved in the education sector, this could provide new impetus for the education reforms in Bolivia. However, the role of donors has also changed in the meanwhile. Domestic resources have increased significantly since 2006 for the government as a whole, and external resources for education are diminishing as a percentage of total resources. At the same time, the relationship between Bolivia and the Netherlands has altered with the recent announcement of the closure of the Embassy and its development programme in the next few years.

This new state of affairs, coupled with a still pressing need to improve the quality of education, commands a careful exit strategy for the Netherlands from the education sector in Bolivia. Though the support for the PEI 2011-2014 has already been committed, there remain areas through which the contribution by the Netherlands can be enhanced. The plans to monitor on results and link disbursements to performance in this phase on the basis of pre-defined indicators could be an important improvement, in line with the findings of this evaluation.

7.2 Relevance

Relevance is defined as 'the extent to which the objectives of an intervention are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donors' policies'.²⁶¹

Dutch support to basic education in Bolivia can be considered relevant as far as government policies are concerned. Its objectives are in line with Bolivian government's objectives (expressed in *Reforma Educativa*, National Development Plan, Bolivian Constitution, the new law '*Avelino Siñani - Elizardo Pérez*'). The Netherlands' concern with access, equity and quality of education is generally in line with global commitments to Education for All and the Millennium Development Goals on Education. Increased leadership and ownership of the Bolivian government has been actively encouraged by the EKN, in line with the commitment of the Netherlands to sector-wide approaches and Paris Principles.

The education programme of the EKN is in principle also consistent with the country's needs. The programme addresses key issues in the Bolivian education sector, e.g. improving the relevance of education in response to high drop-out in older age groups. The

²⁶¹ OECD/DAC (2002), *Glossary of key terms in evaluation and results based management*.

Netherlands does not exert direct, bilateral influence on the government's policies (e.g. through conditionalities, earmarking support or bilateral discussions). However, issues that are omitted in the national education strategies are tackled through funding of international and local NGOs (e.g. post-primary, technical and vocational education, gender). In this way, the EKN pay extra attention to relevance of education and the link with the productive sectors, which is certainly relevant in the Bolivian context.

Despite a very turbulent environment, and in some areas disappointing results of the government's education strategies, the education programme of the EKN has remained relatively stable, being a continuous and reliable partner of the government in the education sector. However, it can be argued that for the support to maintain its relevance for beneficiaries and country needs, the EKN should have responded more actively to the evidence of unsatisfactory results at school level with regard to the quality of education.

7.3 Efficiency

In this evaluation efficiency refers to the way in which the Dutch support to basic education is provided, focusing on the support to the government's education strategy (e.g. choice of instruments, donor harmonisation and alignment).

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The EKN has used a mix of support to government and to NGOs for the education sector in Bolivia over the past ten years. The focus has been on the government programme but the EKN has made an effort to promote synergy between the different instruments (e.g. coordination with NGOs supported by the Netherlands, NGO support flanking support to government).

The Netherlands has played a leading role in achieving progress with the Paris Principles. Alignment and harmonisation have increasingly been applied, though the group of basket donors remains relatively small. Donor coordination has improved, which is said to have lowered the transaction costs for the Bolivian government. It does require a lot of efforts from the donors, even like-minded ones as within the basket. Nevertheless, the basket members have been able to develop a joint proposal for further funding (2011-2014), despite differences in assessment.

The evaluation period is characterised by a gradual move by the Netherlands (and other basket donors) from more conditioned type of sector support to more general, sector-wide support with increasing country ownership. Earmarking was gradually reduced. Failure to fulfil pre-conditions was never a reason to limiting funding. Of course, in such a volatile political and social environment as characterised Bolivia during the evaluation period, earmarking and pre-conditions will always be a challenge. Acting as part of a basket also requires certain trade-offs. However, in the interest of change at school-level for teachers and students, such an approach necessitates much closer and effective monitoring and evaluation of the results of the education strategies (and its determinants), than has been the practice to date.

The picture is mixed regarding education sector management and governance, which affects the efficiency of implementing the country's education strategy as supported by the Netherlands. The CEPOs, funded by the Netherlands, has been a case of exceptional success of popular participation in the education sector. The decentralisation process has gone no further than deconcentration, which limited implementation capacity at all levels and is said to have impeded education reforms to reach the classrooms in large parts of the country. There is a wide variation in expenditure per student throughout the country, which does not seem to reflect differences in costs or targeting of the poor. In general, improved governance and capacity in the education sector should be encapsulated in broader government reforms, not only with regard to decentralisation but also broader civil service reforms.

7.4 Effectiveness

Effectiveness assesses the extent to which the direct results, or output, of an intervention contributed to the objectives, or outcomes. Effectiveness of the Dutch contribution to the education sector in Bolivia is measured by the outcomes of the Bolivian education policies and strategies mainly with regard to access, quality, relevance and equity.

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Unfortunately, there is too limited data available to assess the effectiveness of the Dutch contribution to the education sector in Bolivia, let alone identify the key determinants of the developments in education access and quality in the past ten years. Though there have been significant improvements in data collection by the ME (e.g. RUDE), there are also negative developments in this area (e.g. cancellation of household surveys 2010). The risk that both education quantity and quality are not monitored properly is comparable to macro-economic management without inflation figures. The Netherlands as a major and active donor, and a respected partner of the ME, has an important role to play.

Nevertheless, an analysis of household data provides some useful insights about education quantity. Access to education has increased over the past ten years, more so in rural areas, and both for girls and boys. However late entry and school leaving from the age of 13 remain a challenge, especially in rural areas. Other studies have indicated that the gap in access to primary education between indigenous and non-indigenous populations has diminished. Nevertheless, differences in completion rates remain, especially for those living in poor, rural families. This is of particular concern given that differences in schooling explain part of income inequality in Bolivia. More research is needed to assess how access differs for different population groups or geographical areas, and how well different policies respond to those challenges.

There is insufficient data to come to conclusions about quality and relevance of education. Small studies, though not representative for the country as a whole, are illustrative of some of the worrying circumstances in which Bolivian children receive their education. Partial implementation of the *Reforma* and uncertainty about the government's education strategy in recent years, have limited improvements in quality of education and are apparently reinforcing existing processes of exclusion.

It is also likely that in particular the limited attention to post-primary education and fragmented implementation of intercultural education during the evaluation period has impeded the relevance of education in Bolivia. The attention of the Netherlands to technical and vocational education addresses this concern. Hopefully, FAUTAPO's recent attention to improving its M&E systems will generate useful information in the near future about the links between education and the productive sectors and the way in which TVET can be brought to scale.

7.5 Sustainability

The evaluation of the longer term impact of the Dutch support to the basic education sector is based on an assessment of the institutions and organisations that implement the national education sector strategy, i.e. the financial and institutional capacity of those institutions to function in the longer run and the way in which the Dutch support has contributed to that.

Analysis of education expenditure for the public education sector as a whole, including subnational levels, points to a reduced share of external financing. As such, overall donor dependency has been reduced over the evaluation period. However, the ME has become reliant on the basket funding for some crucial aspects of the education sector strategy (e.g. key positions in the Ministry, M&E and curricula development). Moreover, part of the domestic resources allocated to very large, recurrent education sector programmes, such as the *Bono Juancito Pinto*, are based on volatile sources of income such as from hydrocarbons, which raises concern about their sustainability.

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From different external assessments of the institutional capacity of the ME can be concluded that important improvements have been made during the evaluation period. However, assessments by the EKN as reported in appraisal documents might have been worded too optimistic. The internal organisation of the ME remains a concern, though the recent stability in the management of the Ministry provides scope for improvement. The capacity of subnational levels to implement education policies is hindered by the limited progress in decentralisation.

In addition to support through the basket funding, the Netherlands has contributed to two operational audits of the ME's capacity in 2005 and in 2009. However, more effective monitoring on the basis of relevant progress indicators, and linked to more stringent follow up of institutional assessments (e.g. with regard to human resource policies), is required to ensure such investments by the Netherlands lead to sustainable improvements. Moreover, in the longer term, the capacity of the Ministry is determined by the management and governance of the government as a whole.

Annexes

Annex 1 About IOB

Objectives

The objective of the Policy and Operations Evaluation Department (IOB) is to increase insight into the implementation and effects of Dutch foreign policy. IOB meets the need for independent evaluation of policy and operations in all policy fields falling under the Homogenous Budget for International Cooperation (HGIS). IOB also advises on the planning and implementation of the evaluations for which policy departments and embassies are responsible. Its evaluations enable the Minister of Foreign Affairs and the Minister for Development Cooperation to account to parliament for policy and the allocation of resources. In addition, the evaluations aim to derive lessons for the future.

Efforts are accordingly made to incorporate the findings of evaluations into the Ministry of Foreign Affairs' policy cycle. Evaluation reports are used to provide targeted feedback, with a view to improving both policy intentions and implementation. Insight into the outcome of implemented policy allows policymakers to devise measures that are more effective and focused.

Approach and methodology

IOB has a staff of experienced evaluators and its own budget. When carrying out evaluations, it calls on the assistance of external experts with specialised knowledge of the topic under investigation. To monitor its own quality, it sets up a reference group for each evaluation, which includes not only external experts but also interested parties from within the Ministry of Foreign Affairs.

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Programme

The evaluation programme of IOB is part of the programmed evaluations annexe of the explanatory memorandum to the budget of the Ministry of Foreign Affairs.

An organisation in development

Since IOB's establishment in 1977, major shifts have taken place in its approach, areas of focus and responsibilities. In its early years, its activities took the form of separate project evaluations for the Minister for Development Cooperation. Around 1985, evaluations became more comprehensive, taking in sectors, themes and countries. Moreover, IOB's reports were submitted to parliament, thus entering the public domain.

In 1996 a review of foreign policy and a reorganisation of the Ministry of Foreign Affairs took place. As a result, IOB's mandate was extended to the Dutch government's entire foreign policy. In recent years, it has extended its partnerships with similar departments in other countries, for instance through joint evaluations.

Finally, IOB also aims to expand its methodological repertoire. This includes greater emphasis on statistical methods of impact evaluation. As of 2007 IOB undertakes policy reviews as a type of evaluation.

Annex 2 Terms of Reference

Introduction

The Policy and Operations Evaluation Department of the Ministry of Foreign Affairs of the Netherlands (IOB)²⁶² is responsible for reviewing the Dutch support to basic education, by 2011.²⁶³ For this policy review, IOB will draw on several country evaluations, among which in Bolivia and Bangladesh.²⁶⁴ IOB has already finalised impact evaluations of primary education in Uganda and Zambia.²⁶⁵

The Bolivia evaluation has a different set up compared to the other country evaluations. Its time frame is considerably shorter, which limits the scope of the evaluation. All country evaluations build on existing research and evaluations and in Bolivia there are some very recent studies that will be used. For example, the education basket donor group commissioned an evaluation of the government's education sector plan in July 2010, and this study will be used a starting-point for this evaluation.²⁶⁶

This document describes the objective, scope, methodology and organisation of the evaluation.

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Objective

In line with the broader policy review, the objective of the country evaluation is to evaluate the relevance, effectiveness, efficiency and sustainability of the Dutch support to the basic education sector in Bolivia. The contribution by the Netherlands will be analysed as one of many actors in the national education sector.

Scope

According to the most recent Dutch policy (1999), basic education is considered part of a larger 'education column', that covers a life-long process, potentially ranging from early childhood development up to tertiary education.²⁶⁷ Though the policy review, and therefore the country evaluation, follows a narrower definition of basic education, this will be considered as an integral part of the overall education sector strategy. This is particularly important in Bolivia given the fact that since 2004, the Royal Netherlands Embassy (EKN) supports the overall education sector.

²⁶² Policy and Operations Evaluation Department (IOB), www.minbuza.nl/iob-en.

²⁶³ For more information, see IOB (2009), *Terms of Reference Policy evaluation: Dutch policy on basic education and development cooperation*.

²⁶⁴ The countries have been purposefully selected in order to provide an overview of the world-wide support to basic education by the Netherlands.

²⁶⁵ Uganda: OB (2008), *Impact Evaluation: Primary Education in Uganda*, IOB Evaluation no. 311; and Zambia: IOB (2008), *Impact Evaluation: Primary Education in Zambia*, IOB Evaluation no. 312.

²⁶⁶ HIFAB (2010), *Evaluación del Programa Operativo Multianual de Apoyo al Sector Educativo en Bolivia 2004-2009*.

²⁶⁷ Ministry of Foreign Affairs (1999), *Onderwijs is een recht voor iedereen, Ontwikkelingssamenwerking en basic education: beleid, ervaringen en uitvoering*. English translation 2000, *Education: a basic human right. Development cooperation and basic education: policy, practice and implementation*.

In the policy review, and thus in all country evaluations, basic education is defined as primary education and first stage secondary education for children and youth.²⁶⁸ In Bolivia the focus will therefore be on the compulsory eight years of schooling in the '*nivel primario*' -primary education- (years 1-8, age 6 to 13) and the subsequent '*nivel secundario*' –first cycle of secondary education- (years 1 and 2 up to age 15-16).²⁶⁹ This implies that adult education and the '*nivel pre-escolar*' (pre-school) will not be evaluated. Technical and vocational education will be evaluated where relevant to the education for children and youths between the ages 6-16. However, given the way in which the programme of the EKN deals with so-called 'productive education' and links between sectors, a programme as FAUTAPO will be covered in the descriptive part of the evaluation.

Furthermore, the country evaluation will focus on bilateral cooperation. The evaluation period will cover the period between 2001 and 2009.

Methodology

Approach

The key evaluation questions (see section 6) that form the structure of the evaluation are based on the Dutch policy on basic education. They are organised according to the standard evaluation criteria of relevance, efficiency, effectiveness and sustainability. In sum, these evaluation questions tackle:

What has been the contribution of the Dutch support to the education sector in Bolivia?
What lessons can be drawn for the future with regard to the Dutch support to basic education?

The evaluation questions will be addressed in four groups:

1. Bolivia education strategy and policies (EQ 1,2,15, 16)
2. External/Dutch support to the Bolivian education sector (EQ 4, 5, 6, 10, 11, 13, 14, 16)
3. Data analysis of education sector effectiveness (EQ 3, 7, 8, 9, 13)
4. Decentralisation (finance and governance) in the education sector (EQ 2, 12, 15, 16)

Bolivia education strategy and policies

On the basis of qualitative evaluation, mainly through interviews and extensive documentation review, this study will provide an overview of the main characteristics of the national basic education sector and how they have evolved over the evaluation period, given the specific political and social context. Attention will be paid to the quality and equity of education. In order to assess the sustainability of the sector strategies, this study will also address the institutional and financial capacity, and commitment to education, of the public and private institutions that implement the education policies.

²⁶⁸ UNESCO ISCED definition, http://www.unesco.org/education/information/nfsunesco/doc/iscsed_1997.htm.

²⁶⁹ The organisation of the curriculum in Bolivia is determined in the '*Ley de Reforma Educativa 1565*' of 2001.

External/Dutch support to the Bolivian education sector

This study will focus on the relevance, efficiency and sustainability of the Dutch support to the Bolivian public education sector. Through documentation review and interviews in Bolivia and the Netherlands, the intervention logic behind the Dutch support will be reconstructed. An analysis will be made of the extent to which the Dutch policy objectives are in line with those of the Bolivian government. The study will also evaluate the choice of aid modalities, in particular the sector-wide approach, and the contribution made by the EKN to donor harmonisation and alignment. The Dutch support will be assessed as one of many actors in the sector, especially as part of the donor basket for support to the education sector.

Data analysis of education sector effectiveness

This study will review the available research and statistical data on the basic education sector in Bolivia (national and decentralised levels) in order to provide an overview of the main developments in the basic education sector, at a disaggregated level with specific attention to women & girls, geographical distribution, and if possible, to indigenous and disadvantaged population groups. The study will assess evidence on whether and how the basic education programmes of the national government and/or local NGOs, supported by the Netherlands, contributed to the relevance, quality and equity of education in Bolivia. Depending on the quality and availability of data, effectiveness will be established in a causal sense (e.g. cases in which the setting and data allow one to credibly attribute impacts to particular interventions), or through a more descriptive analysis. Moreover, the report will include a section with recommendations on data collection, monitoring and evaluation in the Bolivian education sector.

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Governance education sector: Decentralisation

This study will focus on evaluating the way in which decentralisation has affected the education sector's efficiency (financing, management and governance) and sustainability (implementation capacity at different levels, such as municipalities), and the implications thereof for the Dutch support to education.

Methods

Existing material will be used as the departure point for the evaluation. In the past few years, interesting reports have been written on the (basic) education sector in Bolivia,²⁷⁰ and very recently the education basket donor group commissioned an evaluation of the government's education sector plan.²⁷¹ Moreover, IOB initiated field research on coping mechanisms of populations in rural areas in Chuquisaca.²⁷² For the purpose of this country evaluation an

²⁷⁰ For example, on the quality of education: Yapu, M. (2009), *La calidad de la educación en Bolivia. Tendencias y puntos de vista*. Or on decentralisation: Mesa de Trabajo en Educación (2006), *Rol y Potencialidades de la Descentralización en Educación Bolivia*.

²⁷¹ HIFAB (2010), *Evaluación del Programa Operativo Multianual de Apoyo al Sector Educativo en Bolivia 2004-2009*.

²⁷² Dulon, R. et al. (2010), *Investigaciones sobre estrategias campesinas en comunidades rurales del norte de Chuquisaca y Potosí – Bolivia Pied Andino – 2010. Cambios identificados a nivel municipal, comunal y familiar – efectos en las estrategias de vida y desarrollo campesinas*.

education component has been added to this research. In this way the country evaluation by IOB intends to build upon existing work, fill in gaps, rather than duplicate efforts.

The country evaluation will mainly be of a qualitative nature. Quantitative research, or statistical impact evaluation as carried out in the education evaluations in Zambia, Uganda and Bangladesh, is not possible given time and data limitations.

The evaluation will use both qualitative and quantitative data. The main data sources for the quantitative data analysis will be existing statistical data from the Ministry of Education (SIE), national statistics office (INE), and the *Unidad de Análisis de Políticas Sociales y Económicas* (UDAPE).²⁷³ The qualitative research will be based on document reviews, field visits, interviews and focus group discussions with key stakeholders in the education sector. Unfortunately, due to the holiday season it will not be possible to include the ultimate beneficiaries of the Dutch support to the education sector: schools, teachers and students.

Organisation

Team

The team will consist of several national and international experts, who will deliver individual reports (Spanish/English) but also work together as a team and provide input into each other's work. The team will be led by Phil Compernelle, assisted by Kirsten Mastwijk, from the Policy and Operations Department (IOB). Phil Compernelle will also compile the different studies into one country evaluation report.

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The following experts have been identified:

- Mr Arend Pieper (focus on external/Dutch support)
- Mr Miguel Urquiola (focus on data analysis, M&E)
- Mr Alfonso García Salaués (focus on decentralisation, governance and financing)
- Ms Beatriz Cajías (focus on Bolivia education sector developments)
- Where necessary, these experts will draw in additional expertise.

Involvement of key stakeholders

The EKN has explicitly requested IOB to limit the burden on the central Ministry of Education.²⁷⁴ Surely, this is the point of departure for every country evaluation and IOB will work closely with the EKN to ensure this happens according to on-going national processes. The team will be well prepared during the evaluation mission and concentrate on filling the gaps left by the most recent evaluation rather than duplicating their research.

²⁷³ For example, from INE, UDAPE and SIE: e.g. *Censos 1992 y 2001; Encuestas de hogares a nivel individual con identificadores geográficos (Encuesta Integrada de Hogares 1990-1995); Encuesta Nacional de Empleo 1996 y 1997; Encuesta de Medición de Condiciones de Vida 1999-2002/2003-2004; Encuesta de Hogares 2005-2009*. And administrative data, such as from SIE (since 1990), or from RUDE (since 2006-2007), registrations for Bono Juancito Pinto. The usefulness and credibility of different data sources will be assessed in the evaluation.

²⁷⁴ EKN La Paz (2010), *Memorándum EDU-043/10*.

In principle, IOB would like to set up a country reference group to comment on the final report and enhance the dissemination of the lessons resulting from the evaluation. IOB will discuss with the EKN the desirability of such a country reference group and participation therein of different stakeholders (donor group, civil society, government).

Quality control

The draft final report will be shared with key stakeholders in the country, through the reference group and directly (representatives of the Ministry of Education, EKN, and donor group). The international reference group for the policy review as a whole will also be asked to comment on the draft final report, as they have done for the other country evaluations. Moreover, two colleagues in IOB will peer-review the work before finalising the report.

Evaluation questions

Context analysis

1. What are the main characteristics of the national basic education sector and how have these evolved over the evaluation period (national policies, priority interventions and activities, objectives, targets and key indicators, institutional and organisational set-up, education system,²⁷⁵ role within broader development plan and reforms engagement, involvement of private sector and civil society)
2. What are the main characteristics of the financing and expenditure, and costs, in the (basic) education sector during the evaluation period (at central and decentralised levels),²⁷⁶ with particular attention to the geographical distribution?
3. What have been the main developments in the basic education sector since the 1990s, at a disaggregated level with specific attention to indigenous and disadvantaged population groups, women & girls and geographical distribution?
 - a. Numbers: of students (access, attendance, age, demographics) by grade
 - b. School infrastructure: schools, classrooms, water and sanitation, boarding, nutrition programmes, management, etc.
 - c. Teaching and learning materials and pedagogy (class periods, language of instruction, methods, text books, etc.)
 - d. Teachers: responsibilities, educational background, in-service and pre-service teacher training, etc.

²⁷⁵ Education system refers to e.g. teacher training, curriculum development, the production and distribution of teaching materials, advisory services, school management and funding systems.

²⁷⁶ In terms of financing attention will be paid to: (i) trends in basic education expenditure and financing (recurrent, development/investment, components) of Government, donors and households (in terms of volume, % of GDP, % of public spending, % of education sector spending, share of donor financing,...); (ii) principles and mechanisms for the (timely) allocation of funds; and (iii) distribution of expenditure (geographical, population groups). In terms of costs, attention will be paid to recurrent, investment and development costs of teacher salaries and career structure, teaching and learning materials, school infrastructure (schools, classrooms, water and sanitation), stipends, costs per pupil, school fees and other private costs of education.

Relevance²⁷⁷

4. What have been the main objectives of the Dutch support to the basic education sector and how were they selected (including target group and priority areas)?²⁷⁸ How are women and girls, and other disadvantaged groups, targeted in the Dutch support?
5. To what extent are the objectives of Dutch support to basic education in line with the national (basic) education sector strategy?
6. What is covered by the portfolio of Dutch support to the basic education sector during the evaluation period? Within the portfolio, what is funded through support to Dutch and local NGOs (including objectives, target groups, link with public basic education sector, and cooperation with Dutch embassy). What is known about their results (based on existing evaluation material)?

Effectiveness²⁷⁹

7. To what extent did the basic education programmes of the national government and/or NGOs, supported by the Netherlands, contributed to:
 - quality and relevance of basic education (measured by e.g. learning achievements, completion rates, continued learning opportunities after primary education, access to the labour market),
 - equal opportunities to basic education and educational achievement for people from the most disadvantaged groups (measured by analysing outcomes and interventions for population groups from different socio-economic strata, and, if possible, for specifically disadvantaged groups or communities),
 - gender equity in access to basic education and educational achievement (measured by analysing targeted interventions and outcomes disaggregated by gender), and
 - where possible given data availability, the welfare effects of improved access to and quality of basic education (improvements in health, social and economic opportunities).²⁸⁰
8. What are the main material and non-material determinants of these developments in basic education (individual/household, community, school characteristics)?²⁸¹
9. Which education interventions have had the greatest impact? And what has been the role of the Netherlands in promoting these interventions?

²⁷⁷ Relevance is defined as ‘the extent to which the objectives of an intervention are consistent with beneficiaries’ requirements, country needs, global priorities and partners’ and donors’ policies’. Source: OECD/DAC (2002), *Glossary of key terms in evaluation and results based management*.

²⁷⁸ Based on interviews and review of annual plans, sector track records, multi-annual strategic plans (2008-2011) and other policy documents of the Embassy.

²⁷⁹ Effectiveness refers to the effects on learning achievements (outcome) of the national basic education policies, the main determinants of changes in outcomes and the role of the Netherlands among those. Particular attention will be paid to the distribution of effects and the achievements of most disadvantaged groups, women and girls.

²⁸⁰ Where possible existing research should be used to provide information on the welfare effects and thus relevance of education in the selected countries (even if not necessarily for those children whose education has been supported by the Netherlands). For example, Burchfield, S. et al. (2002), *A longitudinal study of the effect integrated literacy and basic education programs on the participation of women in social and economic development in Bolivia*.

²⁸¹ The determinants at school level will for a large part be material (e.g. classrooms, textbooks, stipends, socio-economic status). However, where possible given data availability, non-material determinants should be included in the analysis as well (e.g. accountability systems, teacher motivation).

Efficiency²⁸²

10. What have been the main instruments and modalities for the Dutch support to basic education and what factors explain the choice thereof (including input target)?
11. How has the sector-wide approach developed during the evaluation period in Bolivia? What has been the role of the Netherlands?
12. What are the main characteristics of (basic) education sector management and governance at different levels of the system (focusing on decentralisation processes)? How does this influence the external sector support?²⁸³
13. How is the national (basic) education sector monitored and evaluated in country by government and donors?
14. What results have been accomplished in the (basic) education sector during the evaluation period in the area of donor harmonisation and alignment? What has been the role of the Netherlands (e.g. within the donor basket funding)?

Sustainability²⁸⁴

15. What is the institutional and financial capacity, and commitment to education, of the public and private (if relevant) institutions that implement the national basic education strategy? For example, what is the capacity and commitment at decentralised levels of government? Have investments in school infrastructure, more (qualified) teachers, etc. been followed by increases in recurrent budgets to ensure continued operation and maintenance?
16. To what extent has the Dutch support contributed to the sustainability of the national education sector policies (e.g. investments in capacity building support for decentralisation processes, exit strategies)? What have been the results according to the main stakeholders?

²⁸² Efficiency can be defined as 'a measure of how economically resources/inputs (funds, expertise, time, etc.) are converted into results'. Source: OECD/DAC (2002), Glossary of key terms in evaluation and results based management. In the country studies efficiency will refer to the way in which the Dutch support to basic education is provided, rather than the efficiency (or cost-effectiveness) of specific basic education policies.

²⁸³ Particular attention will be paid to issues of transparency and accountability at different levels of the education system and the role of the donors in education sector governance.

²⁸⁴ Sustainability is defined as 'the continuation of benefits from a development intervention after major development assistances has been completed'. Source: OECD/DAC (2002), Glossary of key terms in evaluation and results based management.

Annex 3 Interviews²⁸⁵

The Netherlands

Ministry of Foreign Affairs of the Netherlands

Chris de Nie	Staff member DEC
Francis Kettenis	Country Officer
Martin de la Beij	Head DDE, Former Ambassador La Paz
Vincent Sniijders	Head DSO/OO

Embassy of the Kingdom of the Netherlands in La Paz

Anke van Dam	Education specialist
Beatriz Delgadillo	Budget administrator
Damaris Sánchez	Secretary
Gary Montaña	Economic advisor
Silvia Velarde	Education specialist
To Tjoelker	Head Development cooperation

Foreign Embassies

Swedish Embassy in La Paz

Rebecca Borda	Programme officer
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Danish Embassy in La Paz

Ivette Long	Programme officer
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Spanish Embassy in La Paz

Carmen de Diego	Programme officer
Jordi Borlan	Programme officer

Venezuela Embassy in La Paz

Promotora alfabetisation

Cuban Embassy in La Paz

Danilo Sanchez	Counsellor
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Bolivian government bodies

Ministerio de Autonomías

Cecilia Urquieta

²⁸⁵ On June 9th 2011, a workshop was held in La Paz during which the preliminary findings were presented to an audience of the ME, NGOs, Embassy, researchers from PIEB and different universities, INE, and UDAPE. The input from the participants has been very valuable in order to finalize the evaluation report.

Ministerio de Educación

Bernardo Ramos	Dirección General de Asuntos Administrativos
Carla Camacho educativo	Responsable de Investigación sectorial indicadores y análisis
Carlos Aramayo	Finanzas FPS
Crisitan Mendivil	Unidad de infraestructura educativa PROMES
Nancy Yupanqui	Responsable de sistemas de información - SIE
Nicolás Torres	Director General, Administrative Affairs
Rocío Ticona	Gerente Regional FPS
Susana Postigo	Director Relaciones Internacionales

Ministerio de Transparencia

Carlos Camargo	Director General del Viceministerio de Transparencia
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SEDUCA Chuquisaca

Donato Poma Gutierrez	Jefe de la unidad de análisis e información educativa
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SEDUCA La Paz

Esteban Quispe Alanoca	Jefe de la unidad de asistencia técnica pedagógica
Javier León Cutile	Jefe de la unidad de seguimiento y supervisión

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Bolivian institutes

Instituto Nacional de Estadística (INE)

Jorge Leiton Quiroga	Director de Estadísticas Sociales
Ludwin Torres	

Unidad de Análisis de Políticas Económicas y Sociales (UDAPE)

Fernando Landa	
Roland Pardo	Director de Políticas Sociales

NGOs

Plan International Inc.

Daniel Rojas	Program Advisor (Health)
Esteban Ugrinovic	Resources Mobilization and Partners Manager
Gustavo Tapia Revollo	Research and Evaluation Coordinator
Juan Felipe Sánchez	Country Director
Sergio von Vacano	Program Advisor (Education)
Ximena Ostria	Program Support Manager

Unicef

Nyurka Villapando	Education specialist
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CEPOS

Patricia Marin	Staff member
Pedro Apala	Staff member

FAUTAPO

Bernardo Paz	Gerente Operativo
Jimena Rojas	Coordinadora Programa de Jóvenes Bachilleres
Jorge Lozano	Gerente Adjunto
Marco Antonio Flores	Responsable Regional Chuquisaca

International organisations

PNUD/UNDP

Miguel Vera	Staff member
Victor Hugo Bacarreza	Staff member
Vivian Arteaga	Staff member

UNFP

Mónica Yaksic

BID/IDB

Baudoin Duquesne	Representante
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Banco Mundial/World Bank

María Alejandra Velasco	Analista de Investigaciones
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Research

PIEB

Mario Yapu	Director Académico
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Researchers PIED Andino II

Geke Weenink	Researcher
Roxana Dulon	Researcher
Zulema Ramos	Investigadora

Grupo de Análisis para el Desarrollo (GRADE)

Martín Benavides	Director Ejecutivo
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Other

María Luisa Talavera Simoni	Researcher Universidad Mayor de San Andres in La Paz
Mieke Lopes Cardoso	Researcher (participant in the Development Cooperation Academy Programme ('IS Academy') of the Ministry of Foreign Affairs in the Netherlands).

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The Netherlands has been one of the largest external donors to the Bolivian education sector, with support accumulating to over EUR 100 million in the past ten years. Since 1993, the Netherlands support has developed into a combination of support to government and to non-governmental entities.

This evaluation focuses on the support of the Ministry of Education, which represented nearly 70% of the education budget of the Embassy of the Kingdom of the Netherlands in the period 2000-2009. The evaluation forms part of a set of evaluations of the Dutch contribution to the basic education sector in different countries.

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