

## Task Force on Standards for Education Spending Estimates Based on Household Survey Data

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Sustainable Development Goal 4 intends to “ensure inclusive and equitable quality education and promote lifelong learning opportunities for all”. While there are no specific targets for financing education, it is necessary to monitor whether sufficient resources are spent in order to reach SDG 4, and whether they are allocated equitably and effectively within education systems.

National governments need regular, accurate data on financing for effective education monitoring and policy planning. For example, to assess the effectiveness of their education systems, governments must be able to link certain types of spending to education outcomes. To evaluate whether resources are distributed equitably, they must know how money flows to students from different backgrounds. For governments to evaluate whether they have the required fiscal space to fund their education programmes, they must know how much they and donors are currently spending, and how much they will need to spend in the future. Donors supporting education in developing countries need to know whether the aid they provide is an incentive for governments to increase spending commitments or if they are crowding out domestic resources. The availability of good data on education financing is a pre-requisite for these types of analyses.

Household expenditure on education services and goods is an important variable, needed to understand not only total investment in education but also equity. Surveys vary in how they record expenditures and, as a result, it is necessary to agree on standards for the collection of information on expenditure and for the calculation of indicators. The Task Force on Standards for Education Spending Estimates Based on Household Survey Data was formed in 2017 to develop guidance on methods to achieve consistency, reliability and comparability in the measurement of expenditure on education based on data from different household surveys. The task force – led by the UNESCO Institute for Statistics with the participation of IIEP-Pôle de Dakar, UNICEF and the World Bank – aimed to produce three outputs:

1. A document that maps existing household surveys with education expenditure data.
2. A methodological document with guidelines for harmonization of existing datasets and recommendations for future data collection on household expenditure on education.
3. Guidelines and a technical protocol for the processing of household survey data and production of SDG and related indicators.

As output 1, the UIS published a report in 2017 that examines the availability and reliability of data on household expenditure on education for the production and analysis of SDG indicator 4.5.4 (education expenditure per student by level of education and source of funding) and other relevant indicators based on household expenditure on education.<sup>1</sup> The report describes the international frameworks on which UIS household education expenditure data are based, highlights the content of the different surveys, and discusses the characteristics of the expenditure data available for analysis and indicator calculation.

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<sup>1</sup> UNESCO Institute for Statistics (UIS). 2017. “Availability and Reliability of Education Finance Data in Household Surveys.” UIS information paper 43. Montreal: UIS. <https://unesdoc.unesco.org/ark:/48223/pf0000262804>

As output 2, a guidebook by the UIS and the World Bank was published in 2018.<sup>2</sup> The guidebook provides a standardized set of guidelines to foster the harmonization of data on education spending in future household surveys, and to ensure that the data collected are more easily comparable across surveys and across countries, while being both comprehensive and responsive to specific national priorities. It is designed to provide guidance to national statistics offices and other institutions implementing national surveys that monitor multiple dimensions of well-being or education.

Work on output 3 – the guidelines and technical protocol for the processing of existing surveys, extraction of suitable data on education expenditure, and production of SDG and other indicators – is ongoing. The Task Force aims to complete this document in the second half of 2019.

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<sup>2</sup> Gbemisola, Oseni, Friedrich Huebler, Kevin McGee, Akuffo Amankwah, Elise Legault, and Andonirina Rakotonarivo. 2018. *Measuring Household Expenditure on Education: A Guidebook for Designing Household Survey Questionnaires*. Washington, DC: World Bank. [http://surveys.worldbank.org/sites/default/files/publications/Education%20GB\\_LSMS\\_2018.pdf](http://surveys.worldbank.org/sites/default/files/publications/Education%20GB_LSMS_2018.pdf)