

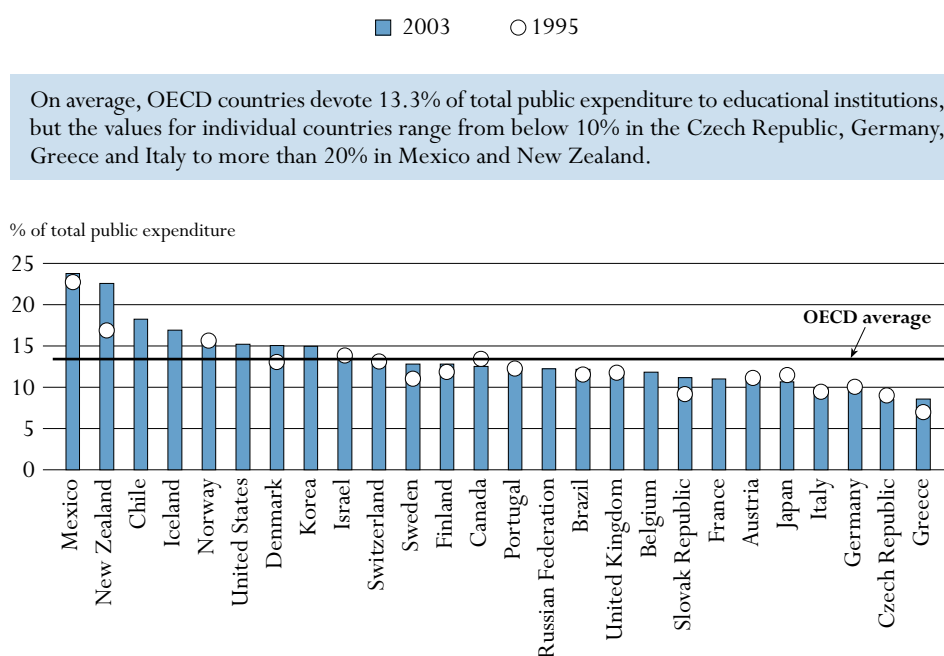
TOTAL PUBLIC EXPENDITURE ON EDUCATION

Public expenditure on education as a percentage of total public expenditure indicates the value placed on education relative to that of other public investments such as health care, social security, defence and security. It provides an important context for the other indicators on expenditure, particularly for Indicator B3 (the public and private shares of educational expenditure), as well as quantification of an important policy lever in its own right.

Key results

Chart B4.1. Total public expenditure on education as a percentage of total public expenditure (1995, 2003)

The chart shows direct public expenditure on educational institutions plus public subsidies to households (which include subsidies for living costs) and other private entities, as a percentage of total public expenditure, by level of education and year. This must be interpreted in the context of public sectors that differ in the size and breadth of responsibility from country to country.



On average, OECD countries devote 13.3% of total public expenditure to educational institutions, but the values for individual countries range from below 10% in the Czech Republic, Germany, Greece and Italy to more than 20% in Mexico and New Zealand.

Countries are ranked in descending order of total public expenditure on education at all levels of education as a percentage of total public expenditure in 2003.

Source: OECD, Table B4.1. See Annex 3 for notes (www.oecd.org/edu/eqq2006).

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Other highlights of this indicator

- Public funding of education is a social priority, even in OECD countries with little public involvement in other areas.
- In OECD countries, public funding of primary, secondary and post-secondary non-tertiary education is on average three times that of tertiary education, mainly due to largely universal enrolment rates but also because the private share in expenditure tends to be higher at the tertiary level. This ratio varies by country from less than double in Canada, Denmark and Finland to more than five times in Korea and partner country Chile. The latter figure is indicative of the relatively high proportion of private funds that go into tertiary education in Korea and the partner country Chile.
- Between 1995 and 2003, public budgets as a percentage of GDP tended to decline. Education, however, took a growing share of total public expenditure in most countries, although it did not on average grow as fast as GDP. In Denmark, Greece, New Zealand, the Slovak Republic and Sweden, there have been particularly significant shifts in public funding in favour of education.
- On average among OECD countries, 83% of public expenditure on education is transferred to public institutions. In three-quarters of the OECD countries as well as in the partner country Brazil, the share of public expenditure on education transferred to public institutions exceeds 80%. The share of public expenditure transferred to the private sector is larger at the tertiary level than at primary to post-secondary non-tertiary levels and reaches 28% on average among OECD countries with available data.

Policy context

If the public benefits from a particular service are greater than the private benefits, then markets alone may fail to provide these services adequately and governments may need to become involved. Education is one area where all governments intervene to fund or direct the provision of services. As there is no guarantee that markets will provide equal access to educational opportunities, government funding of educational services ensures that education is not beyond the reach of some members of society.

This indicator focuses on public expenditure on education but also evaluates how public expenditure has changed over time in absolute terms and relative to total governmental spending. Since the second half of the 1990s, most OECD countries have made serious efforts to consolidate public budgets. Education has had to compete with a wide range of other areas covered in government budgets for public financial support. To examine this evolution, the indicator evaluates the change in educational expenditure in absolute terms, and relative to changes in the size of public budgets.

Evidence and explanations

What this indicator does and does not cover

This indicator shows total public expenditure on education, which includes direct public expenditure on educational institutions as well as public subsidies to households (*e.g.* scholarships and loans to students for tuition fees and student living costs) and to other private entities for education (*e.g.* subsidies to companies or labour organisations that operate apprenticeship programmes). Unlike the preceding indicators, this indicator also includes public subsidies that are not attributable to household payments for educational institutions, such as subsidies for student living costs.

OECD countries differ in the ways in which they use public money for education. Public funds may flow directly to schools or may be channelled to institutions via government programmes or via households; they may also be restricted to the purchase of educational services or be used to support student living costs.

Total public expenditure on all services, excluding education, includes expenditure on debt servicing (*e.g.* interest payments) that are not included in public expenditure on education. The reason for this exclusion is that some countries cannot separate interest payment outlays for education from those for other services. This means that public expenditure on education as a percentage of total public expenditure can be underestimated in countries where interest payments represent a high proportion of total public expenditure on all services.

It is important to examine public investment in education in conjunction with private investment, as shown in Indicator B3, in order to get a total picture of investment in education.

Overall level of public resources invested in education

On average, OECD countries devoted 13.3% of total public expenditure to education in 2003. However, the values for individual countries range from below 10% in the Czech Republic, Germany, Greece and Italy, to more than 20% in Mexico and New Zealand (Chart B4.1).

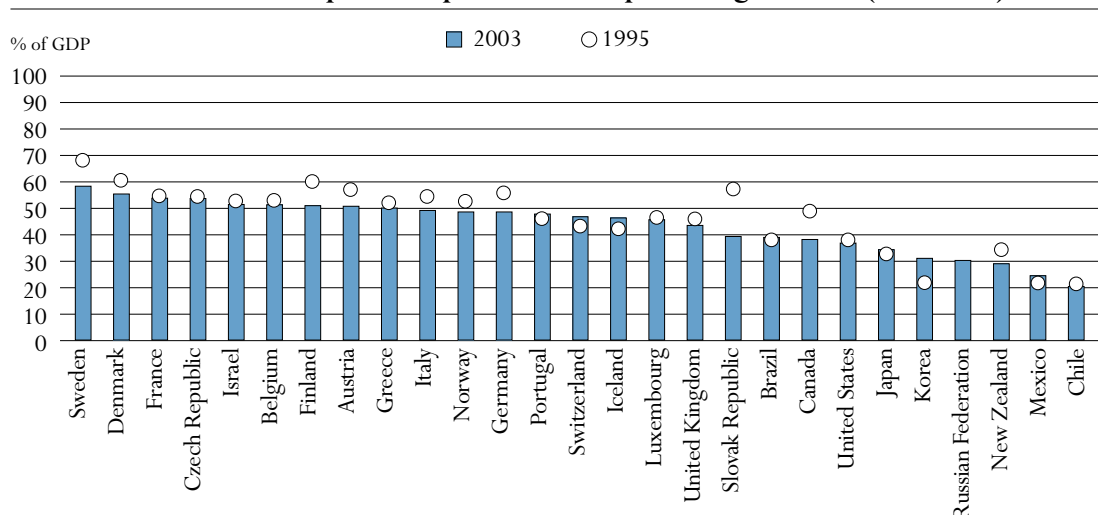
As in the case of spending on education in relation to GDP per capita, these values must be interpreted in the context of student demography and enrolment rates.

The public-sector proportion of funding of the different levels of education varies widely among OECD countries. In 2003, OECD and partner countries spent between 5.3% (Greece) and 16.3% (Mexico) of total public expenditure on primary, secondary and post-secondary non-tertiary education, and between 1.6% (Italy) and 5.5 (New Zealand) on tertiary education. On average in OECD countries, public funding of primary, secondary and post-secondary non-tertiary education is three times that of tertiary education, mainly due to enrolment rates (see Indicator C1) or because the private share in expenditure tends to be higher at the tertiary level. This ratio varies by country from less than two times in Canada, Denmark and Finland to as high as more than five times in Korea and the partner country Chile. The latter figure is indicative of the relatively high proportion of private funds that go into tertiary education in Korea and in the partner country Chile (Table B4.1).

Public funding of education is a social priority, even in OECD countries with little public involvement in other areas. When public expenditure on education is examined as a proportion of total public spending, the relative sizes of public budgets (as measured by public spending in relation to GDP) must be taken into account.

Across OECD countries, when the size of public budgets relative to GDP is compared with the proportion of public spending committed to education, it is evident that even in countries with relatively low rates of public spending, education is awarded a very high level of priority. For instance, the share of public spending that goes to education in Korea, Mexico and the United States is among the highest of OECD countries (Chart B4.1); yet total public spending accounts for a relatively low proportion of GDP in these countries (Chart B4.2). Among partner countries, a similar situation is observed in Chile.

Chart B4.2. Total public expenditure as a percentage of GDP (1995, 2003)



Note: This chart represents public expenditure on all services and not simply public expenditure on education. Countries are ranked in descending order of total public expenditure as a percentage of GDP in 2003.

Source: OECD, Annex 2. See Annex 3 for notes (www.oecd.org/edu/eag2006).

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Although the overall pattern is not clear, there is some evidence to suggest that countries with high rates of public spending spend proportionately less on education; only two of the top ten countries for public spending on public services overall – Denmark and the partner country Israel – are among the top ten public spenders on education (Charts B4.1 and B4.2).

Typically, from 1995 to 2003, public expenditure on education grew faster than total public spending, but not as fast as national income. The process of budget consolidation puts pressure on education along with every other service. Nevertheless, with the exception of Canada, the Czech Republic and Japan, spending on education grew at least as fast as spending in other public areas between 1995 and 2003; on average, the proportion of public budgets spent on education in OECD countries grew from 12.0% in 1995 to 13.3% in 2003. The figures suggest that the greatest increases in the share of public expenditure on education between 1995 and 2003 took place in Denmark (increasing from 12.7% to 15.1%), Greece (6.6% to 8.6%) New Zealand (16.5% to 22.6%), the Slovak Republic (8.8% to 11.2%) and Sweden (10.7% to 12.8%).

Distribution of public expenditure to the public and private sectors

The vast majority of public funds on education are directed at public institutions: an average of 83% of public expenditure is transferred to public institutions among OECD countries. In three-quarters of the OECD countries, as well as in Brazil, the share of public expenditure on education transferred to public institutions exceeds 80%. However, significant public funds are transferred to private institutions or given directly to households to spend in the institution of their choice in a number of countries: more than 20% of public expenditure is distributed (directly or indirectly) to the private sector in Denmark, New Zealand, Norway, the United Kingdom and in the partner countries Chile and Israel. In Belgium and the Netherlands, the majority of public funds goes to government-dependant institutions that are managed by private bodies but operate otherwise under the aegis of the regular education system (Table B4.2).

On average among OECD countries, at the primary, secondary and post-secondary non-tertiary levels, 11% of public funding designated for educational institutions is spent in privately managed institutions. Belgium and the Netherlands are the only countries where the majority of funds goes to privately managed institutions. Public funding transfers to private households and other private entities are generally not a significant feature at primary, secondary and post-secondary non-tertiary levels. On average among OECD countries, these transfers represent 3% of public expenditure on education and exceed 10% only in Denmark.

At the tertiary level, on average among OECD countries, the majority of public funds are still directed at public institutions, but the share of public expenditure transferred to the private sector is larger than at primary to post-secondary non-tertiary level and reaches 28% on average among countries with available data. There are, however, substantial variations among countries in the share of public expenditure devoted to the private sector. In the United Kingdom (where there are no public tertiary institutions), Belgium and the Netherlands, as well as the partner country Israel, public expenditure is mainly devoted to privately managed institutions. The share of public expenditure indirectly transferred to the private sector is larger at the tertiary level than below as it is more typical for households/students to receive some transfers of public funding at the tertiary level than at other levels. On average, 17% of public funding is indirectly transferred to the private sector at the tertiary level. These transfers result partly from financial

aid attributed to tertiary students through scholarships, grants and loans (see Indicator B5). The proportion of public expenditure indirectly transferred to the private sector is superior to 30% in Australia, Denmark, New Zealand and Norway and, among partner countries, in Chile.

Definitions and methodologies

Data refer to the financial year 2003 and are based on the UOE data collection on education statistics administered by the OECD in 2005 (for details see Annex 3 at www.oecd.org/edu/eag2006). Educational expenditure is expressed as a percentage of a country's total public sector expenditure and as a percentage of GDP. Public educational expenditure includes expenditure on educational institutions and subsidies for students' living costs and for other private expenditure outside institutions. Public expenditure on education includes expenditure by all public entities, including ministries other than the ministry of education, local and regional governments and other public agencies.

Total public expenditure, also referred to as total public spending, corresponds to the non-repayable current and capital expenditure of all levels of government: central, regional and local. Current expenditure includes final consumption expenditure, property income paid, subsidies and other current transfers (*e.g.* social security, social assistance, pensions and other welfare benefits). Figures for total public expenditure have been taken from the OECD National Accounts Database (see Annex 2) and use the System of National Accounts 1993.

The glossary at www.oecd.org/edu/eag2006 gives a definition of public, government-dependent private and independent private institutions.

Note that data appearing in earlier editions of this publication may not always be comparable to data shown in the 2006 edition due to changes in definitions and coverage that were made as a result of the OECD expenditure comparability study (for details on changes, see Annex 3 at www.oecd.org/edu/eag2006).

Further references

The following additional material relevant to this indicator is available on the Web at <http://dx.doi.org/10.1787/086554011765>:

- *Table B4.3a. Initial sources of public educational funds and final purchasers of educational resources by level of government for primary, secondary and post-secondary non-tertiary education (2003)*
- *Table B4.3b. Initial sources of public educational funds and final purchasers of educational resources by level of government for tertiary education (2003)*

Table B4.1.
Total public expenditure on education (1995, 2003)

Direct public expenditure on educational institutions plus public subsidies to households (which include subsidies for living costs) and other private entities, as a percentage of GDP and as a percentage of total public expenditure, by level of education and year

	Public expenditure ¹ on education as a percentage of total public expenditure				Public expenditure ¹ on education as a percentage of GDP				
	2003		1995		2003		1995		
	Primary, secondary and post-secondary non-tertiary education	Tertiary education	All levels of education combined	All levels of education combined	Primary, secondary and post-secondary non-tertiary education	Tertiary education	All levels of education combined	All levels of education combined	
OECD countries	Australia	m	m	m	13.7	3.6	1.1	4.8	5.0
	Austria	7.5	2.5	10.8	10.8	3.8	1.3	5.5	6.0
	Belgium	7.9	2.6	11.8	m	4.0	1.3	6.1	m
	Canada ^{2,3}	8.2	4.3	12.5	13.1	3.3	1.7	5.0	6.5
	Czech Republic	5.7	1.8	8.5	8.7	3.1	0.9	4.5	4.6
	Denmark ³	8.8	4.5	15.1	12.7	4.8	2.5	8.3	7.7
	Finland	8.0	4.1	12.8	11.5	4.1	2.1	6.5	6.8
	France	7.5	2.2	11.0	m	4.0	1.2	5.9	m
	Germany	6.3	2.5	9.7	9.7	3.1	1.2	4.7	4.6
	Greece	5.3	2.5	8.0	6.6	2.6	1.5	4.3	3.1
	Hungary	m	m	m	12.9	3.7	1.2	5.9	5.3
	Iceland ³	11.9	2.9	17.0	m	5.6	1.4	7.8	m
	Ireland	m	m	m	12.2	3.2	1.1	4.4	5.0
	Italy	7.4	1.6	9.9	9.1	3.6	0.8	4.9	4.9
	Japan ³	7.9	1.8	10.7	11.1	2.7	0.6	3.7	3.6
	Korea	11.5	2.0	15.0	m	3.5	0.6	4.6	m
	Luxembourg ³	8.9	m	m	m	4.1	m	m	m
	Mexico	16.3	4.0	23.8	22.4	4.0	1.0	5.8	4.6
	Netherlands	m	m	m	m	3.4	1.3	5.1	5.1
	New Zealand	16.1	5.5	22.6	16.5	4.8	1.6	6.8	5.6
	Norway	9.9	4.8	15.7	15.3	4.8	2.3	7.6	7.4
	Poland	m	m	m	11.9	4.2	1.1	5.8	5.3
	Portugal ³	8.9	2.2	12.4	11.9	4.2	1.1	5.9	5.4
Slovak Republic ³	7.3	2.2	11.2	8.8	2.9	0.9	4.4	5.0	
Spain	m	m	m	10.6	2.8	1.0	4.3	4.6	
Sweden	8.3	3.7	12.8	10.7	4.8	2.2	7.5	7.2	
Switzerland	8.8	3.5	13.0	12.8	4.1	1.6	6.0	5.4	
Turkey	m	m	m	m	2.5	1.2	3.7	2.4	
United Kingdom	8.8	2.4	11.9	11.4	4.0	1.1	5.4	5.2	
United States	10.4	4.0	15.2	m	3.9	1.5	5.7	m	
<i>OECD average</i>	<i>9.0</i>	<i>3.1</i>	<i>13.3</i>	<i>12.0</i>	<i>3.8</i>	<i>1.3</i>	<i>5.5</i>	<i>5.3</i>	
<i>EU19 average</i>	<i>7.6</i>	<i>2.7</i>	<i>11.2</i>	<i>10.6</i>	<i>3.7</i>	<i>1.3</i>	<i>5.5</i>	<i>5.4</i>	
Partner countries	Brazil ²	8.8	2.5	12.2	11.2	3.4	1.0	4.7	3.9
	Chile ⁴	14.0	2.6	18.3	m	2.8	0.5	3.7	m
	Israel	8.9	2.5	13.7	13.5	4.6	1.3	7.0	7.0
	Russian Federation	6.9	2.3	12.3	m	2.1	0.7	3.7	m

1. Public expenditure presented in this table includes public subsidies to households for living costs, which are not spent on educational institutions. Thus the figures presented here exceed those on public spending on institutions found in Table B2.1a.

2. Year of reference 2002.

3. Some levels of education are included with others. Refer to "x" code in Table B1.1a for details.

4. Year of reference 2004.

Source: OECD. See Annex 3 for notes (www.oecd.org/edu/eag2006).

Please refer to the Reader's Guide for information concerning the symbols replacing missing data.

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Table B4.2.
Distribution of total public expenditure on education (2003)

Public expenditure on education transferred to educational institutions and public transfers to the private sector as a percentage of total public expenditure on education, by level of education

	Primary, secondary and post-secondary non-tertiary education			Tertiary education			All levels of education combined		
	Direct public expenditure on public institutions	Direct public expenditure on private institutions	Indirect public transfers and payments to the private sector	Direct public expenditure on public institutions	Direct public expenditure on private institutions	Indirect public transfers and payments to the private sector	Direct public expenditure on public institutions	Direct public expenditure on private institutions	Indirect public transfers and payments to the private sector
OECD countries									
Australia	77.1	19.7	3.1	65.0	n	35.0	x	x	10.7
Austria	98.4	0.3	1.3	81.3	0.7	18.0	93.2	1.6	5.2
Belgium	44.8	52.7	2.5	35.2	48.9	15.8	43.9	50.9	5.1
Canada ^{1,2}	98.1	1.9	m	77.6	0.4	22.0	91.1	1.4	7.6
Czech Republic	91.5	3.6	4.9	92.8	1.0	6.2	92.6	2.8	4.6
Denmark ²	79.3	6.4	14.3	67.8	n	32.2	76.5	3.9	19.6
Finland	90.8	5.9	3.3	74.4	7.7	17.9	85.7	6.5	7.8
France	84.3	12.6	3.1	86.6	5.2	8.2	85.7	10.5	3.8
Germany	83.2	12.0	4.8	81.6	1.2	17.2	80.6	11.9	7.5
Greece	99.7	a	0.3	94.0	a	6.0	97.9	a	2.1
Hungary	85.1	9.2	5.7	80.5	4.7	14.7	86.0	7.3	6.7
Iceland ²	95.0	1.4	3.6	68.0	7.9	24.1	90.0	2.4	7.6
Ireland	95.6	n	4.4	86.2	n	13.8	93.3	n	6.7
Italy	95.2	2.8	2.0	81.2	1.8	17.0	92.9	2.5	4.6
Japan ²	96.3	3.5	0.2	68.6	12.8	18.6	90.7	6.1	3.3
Korea	82.8	15.4	1.8	61.9	33.5	4.6	81.2	16.6	2.3
Luxembourg ²	97.7	m	2.3	m	m	m	m	m	m
Mexico	94.6	n	5.3	94.1	n	5.9	95.1	n	4.9
Netherlands	22.9	70.6	6.5	a	74.1	25.9	17.5	71.4	11.1
New Zealand	89.0	3.7	7.3	55.1	1.5	43.4	79.7	4.3	16.1
Norway	88.0	6.4	5.6	59.6	3.7	36.7	78.1	6.6	15.3
Poland	m	m	m	m	m	m	m	m	m
Portugal ²	92.5	6.1	1.4	97.4	m	2.6	92.4	6.1	1.5
Slovak Republic ²	93.8	4.2	2.0	91.5	a	8.5	94.2	2.8	3.0
Spain	84.6	14.1	1.3	90.1	2.0	7.9	86.2	11.0	2.8
Sweden	87.3	6.4	6.3	66.9	4.7	28.4	81.5	6.2	12.3
Switzerland	90.5	7.3	2.2	93.6	4.5	2.0	91.3	6.5	2.2
Turkey	99.2	m	0.8	86.7	0.1	13.2	95.1	n	4.8
United Kingdom	76.7	23.2	0.2	a	75.3	24.7	63.0	32.0	5.0
United States	99.8	0.2	a	70.3	11.8	17.8	91.5	3.8	4.7
OECD average	86.7	10.7	3.4	71.7	11.2	17.4	83.2	10.2	6.7
EU19 average	83.5	13.5	3.7	71.0	14.2	15.6	80.2	13.4	6.4
Partner countries									
Brazil ¹	95.0	a	5.0	88.0	a	12.0	93.5	a	6.5
Chile ³	61.0	38.5	0.5	34.6	30.7	34.6	57.8	36.9	5.3
Israel	73.8	24.7	1.5	5.1	84.9	10.1	63.3	33.6	3.1
Russian Federation	m	m	m	m	m	m	m	m	m

1. Year of reference 2002.

2. Some levels of education are included with others. Refer to "x" code in Table B1.1a for details.

3. Year of reference 2004.

Source: OECD. See Annex 3 for notes (www.oecd.org/edu/eag2006).

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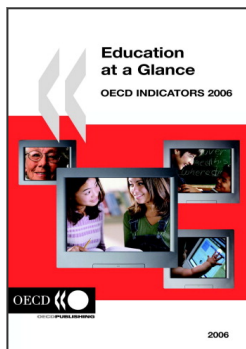
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