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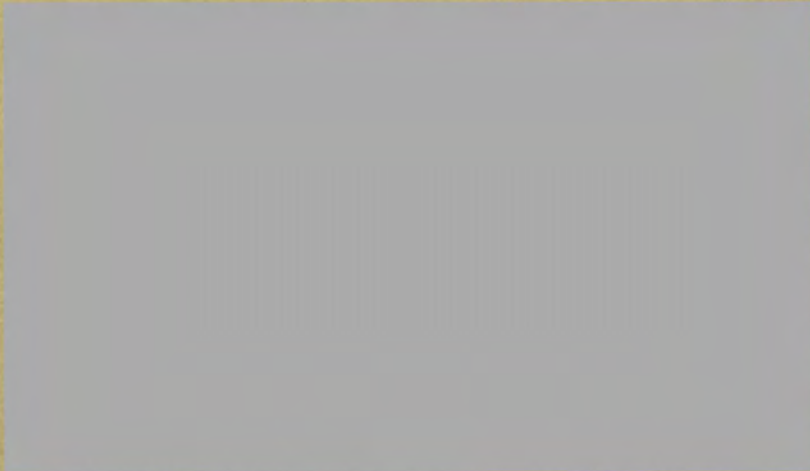


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The World Bank
1818 H Street NW
Washington DC 20433
Telephone: 202-473-1000
Internet: www.worldbank.org

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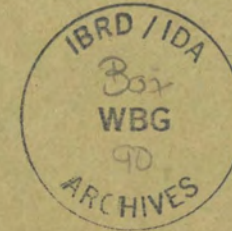
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NALEPPA

*International Union of Architects Symposium
School Buildings, Mexico City - Oct 5-9, 1963 -
Speech outline*

filed Naleppa Speech bk.

October 4, 1963

PROBLEMS RELATED TO FINANCING OF EDUCATIONAL FACILITIES

Gunter Naleppa
Architect
Education Division
Department of Technical Operations
International Bank for Reconstruction and Development
Washington, D. C.



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Outline

1. Last year, the International Bank for Reconstruction and Development, and its affiliate the International Development Association, initiated the task of financing educational investment in newly developing countries. In his Address to the Boards of Governors last week in Washington, the President of the World Bank, Mr. George Woods, stated:

"I believe that we will have to do more to help create the facilities necessary to the spread of education. Education is of course a valued end in itself, but it is also of central importance in the whole development process.....Secondary and vocational schools, in particular, can have a fairly rapid impact on development by providing the middle-level manpower as well as the specialists in administration, agriculture and other subjects that are so important in economic growth. IDA already has made one credit for school construction in Tunisia, and is considering similar credits elsewhere. I believe it would now be appropriate for the Bank, too, to lend for school facilities of high economic priority."

2. To provide a framework and a reasonable limitation to the scope of the Bank/IDA's activities in this field, certain ground rules for financing had to be laid down. One of the criteria for Bank/IDA financing of education and training projects is as follows:

The Bank and IDA would not be able to consider any project which had not been properly planned, in its human, material, and financial aspects. Well-documented cost estimates will be needed together with an analysis of the relation between costs and benefits (while recognizing, of course, that many of the benefits cannot be quantified). In some cases, however, technical assistance may be provided for the preparation of a project to be subsequently financed."

3. When a government, or an institution backed by its government, has prepared a project and approaches us for financing, we first study the information submitted in support of the request. If by our criteria

the project merits consideration, we send a team to appraise the project. We study all aspects of the planning, including administration, construction, management, operation and financing. We are concerned, in the first instance, with whether the project is educationally sound, whether it contributes to important requirements for manpower, and whether in the light of all the claims for expenditure on education and training this particular investment is justified. We particularly review the estimated cost, the proposed method of financing and the means available to implement it.

4. The appraisal of the merits and the feasibility of a project necessitates, among other investigations, an architect's study of location, design and financial aspects of each project against the background of the educational expansion program in a given country. The following information is considered indispensable to the architect's appraisal:

- (1) The site plan, or master plan, showing existing buildings and all proposed extensions and new facilities.
- (2) A written outline of the building program, including a schedule of accommodation, spelling out type and size of facilities, number of students to be accommodated, etc., and sketch plans of all facilities.
- (3) A general description of standards and materials used, sewerage, water and electrical supply, etc.
- (4) Cost estimates for each building and for the total project, including estimated costs for land, buildings, furniture and equipment, indicating the basis on which estimates have been prepared, such as: Cost per square foot or square meter; Cost per student place; or Bills of quantities;

5. A very real problem in this connection is that in most countries we have visited few people know how to prepare school building projects for external financing. We are often approached to finance schools only to find that no one has yet selected sites; cost estimates, if they exist at all, are either incomplete or based on inadequate data; designs are not always of acceptable professional standard.

6. This is, of course, to a great extent due to the shortage of qualified and experienced technical personnel in most developing countries, in government agencies in charge of school building programs, as well as in private firms of architects and engineers and in contracting firms. It is, therefore, part of the task of our appraisal missions to identify gaps and inefficiencies in the system of which the proposed project and its implementation is a part. Wherever necessary the Bank/IDA will consider requests for technical assistance in preparing and implementing school building projects which have been submitted and selected for financing.

7. A professional assessment of a school building project can be made only against a great variety of specific conditions in a given country for a given type of school and educational level. However, there are problems which are common to different countries and regions and where research on a regional or international basis can be of great help. Problems of standardisation and prefabrication, problems related to new teaching methods and techniques, to new building methods and materials, etc., to mention only a few. Most of all, the dissemination of the results of successful experimental work in school building could promote wider understanding of the specific problems of school building and their paramount importance in developing countries.

8. Planning secondary and higher school facilities in developing countries raises the question of day schools versus boarding schools. As a rule of thumb, a boarding school may cost about twice as much as a day school accommodating an equal number of students. Very often there is no alternative to boarding education even at the secondary level where the population is widely scattered. Besides providing desirable equal educational opportunities for rural and lowest-income population, the boarding school undoubtedly has certain advantages from the pedagogical point of view, and in respect to health, welfare and nutrition. However, because of high initial and recurrent costs, boarding requirements need to be examined critically.

9. Another typical problem in school building planning in developing countries is the necessity to build residential quarters for the teaching staff, since very often qualified teachers cannot be recruited unless appropriate quarters are provided. This may have considerable implications on the total costs of a school building project and necessitates investigations in housing and town-planning.

10. Because of the immense gap between needs and available resources, financing education facilities in developing countries must be based on sober economic criteria. However, costs may not be cut below a point consistent with sound educational and building practices. Furthermore, low initial cost of buildings usually increases the possibility of higher maintenance cost throughout the life of the structure.

11. What are, then, the criteria for determining appropriate costs, for a school building, costs per student place or costs per square foot? There is no known hard and fast scale by which to compare costs of school buildings in various countries and, therefore, there is no simple way of arriving at international standards of school building costs. This difficulty is not restricted to school buildings - it applies to any other kind of construction. "Overall comparisons of building costs in two different countries tend to be misleading because of national differences in the end products, in the proportions in which the various sorts of buildings are produced and in the complex of prices for labor and materials."

12. The real value of a school building is, of course, chiefly determined by the extent to which it provides full educational requirements. Therefore, experienced educationalists, hard-headed economists and bankers and imaginative school planners have to recognize each others' points of view; they have to join forces for the great task ahead. To this end, this meeting of school building specialists from all over the world will certainly prove very fruitful. The International Bank for Reconstruction and Development and the International Development Association are looking forward to co-operating with the School Building Commission of the International Union of Architects in the future. We are confident that this body of highest professional standards will help us to tackle the task of financing educational expansion in developing countries by sharing the experience of its members in the manifold problems of school building. A first step in this direction could be, I imagine, to collect and provide samples of cost studies of recently executed school building projects in developing countries, since the Bank/IDA naturally is particularly interested in the problem of appropriate and economical costing and financing of educational facilities.