

EDUCATIONAL INEQUALITY IN LATIN AMERICA. PATTERNS, POLICIES AND ISSUES.

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Introduction

Latin America exhibits one of the highest levels of income inequality in the world and by international standards, middling levels of educational inequality. The historic roots of both inequalities are deep and the contemporary economic, social and political institutions and forces that sustain them are durable and powerful. Yet improved participation by the disadvantaged in quality education is nowadays considered critical not only on ethical grounds for citizenship and social integration, but in terms of lost potential for economic competitiveness. (ECLAC-UNESCO, 1992, World Bank, 2005). This double-edged justification for reforms which aim to build more equitable educational institutions and processes, has, in the last decade and a half, transformed the political economy of educational change in the region. Across the different countries' political spectra, education is seen as holding a strategic key for change and growth, and as a direct result, the 1990-2006 period has seen the greatest activism in education in the history of the region. Most governments have considerably increased their expenditure in the sector; carried forward institutional and curricular reforms; and developed programs which make disadvantaged territories or groups a priority, with improvements in quality and equity as driving goals and criteria. The policies impact not only coverage, which was the main focus of state actions in education throughout the twentieth century, but also institutional and curricular arrangements.

In this context of an inheritance of marked inequalities and policies aimed to reduce them, we address the following questions: firstly, how do the different countries of the region compare in terms of income and educational inequalities and what is the pattern of the relationships between these two dimensions. Secondly, which are the key policy continuities across countries in the examined period and how do they relate to the issue of inequality? Are there any tradeoffs among policies in terms of 'closing the gap' between quantity and quality of education of socio-economic groups? Thirdly, which dimensions of inequality, if any, can be said to have been affected by policies of the 1990-2006 period and to what extent?

Equity is about justice and fairness in distribution of resources and opportunities, criteria ultimately based on moral considerations with roots that go back to religion and classical philosophy. As with any crucial normative concept its meaning varies with groups and history, by country and even by academic disciplines. For a policy framework, we take equity criteria to be orienting principles in public action that strive to achieve equality of opportunity, that is ensuring that predetermined circumstances (gender, race, place of birth, family origins) and social groups a person is born into should not determine his or her opportunities and outcomes nor those of groups in the economic, social and political domains.(World Bank, 2005).

Three levels of equity frame contemporary debates and policy making in education: (1) equity in access to education, or unhindered opportunity regarding participation in formal education; (2) equity within education, or equality of opportunity in the educational process; and (3), equity as equality of opportunity with reference to results or achieved capacities. (Reimers, 2000; García-Huidobro, 2005). There is an evident hierarchy in this triad, with equity of results being the most demanding and presupposing the presence of the other two. We shall use these categories to describe and analyze policies and the evolution of patterns of inequalities in Latin American education, distinguishing (1) *equity as inclusion*, when referring to the first level of equality of opportunity in education, that is access to, and participation in education in terms of

grades completed; and (2), *equity as fairness* when referring to equality of opportunity regarding processes and results of education (OECD, 2007).

The first section of this chapter sketches the general picture of educational inequality in the region, compares income inequality and distinguishes the different development agendas for the quite different levels of development that exist among the countries of the region. The second section describes the main components of educational reform in the Latin American region, for the period 1990-2006, and discusses their impact on the historical patterns of inequality in the social distribution of education. The third section examines available data about years of education and grade-completion by countries and social categories, to assess expansion of access to education by different generations and socio-economic categories. The fourth section describes learning outcomes in six Latin American countries and analyses their association with socio-economic and institutional factors, as well as comparing them with selected OECD countries. This permits an assessment of the region's educational structures in terms of equity of their results. A final section returns to policy issues.

1. Levels of income, education and inequalities in Latin America

For all its historical and cultural continuities, Latin American countries diverge markedly in terms of levels of economic and educational development and in terms of degrees of inequality.

Table 1, presents the per capita income and the mean years of schooling for the eighteen countries of the region. The range of income is 2399 (measured as per capita income in year 2001 PPP dollars) for Bolivia to 12,174 for Argentina; and the range of mean years of schooling is 5.55 years for Honduras to 10.33 years for Argentina.

Table 1. Per capita income and mean years of schooling in Latin American countries.

	GDP per capita, PPP (constant 2000 international \$)	Mean Years of Schooling 1999-2001
Argentina	12174	10.33
Chile	9115	10.27
Mexico	9046	7.78
Uruguay	8782	9.41
Costa Rica	8621	7.90
Brazil	7301	8.38
Dominican Republic	6411	7.47
Colombia	6244	7.19
Panama	6164	9.52
Venezuela, RB	5685	8.29
Peru	4723	8.76
El Salvador	4594	6.56
Paraguay	4553	7.26
Guatemala	3974	4.58
Ecuador	3373	8.12
Nicaragua	3278	5.57
Honduras	2506	5.55
Bolivia	2399	7.63

Source: World Bank (2006) *Development Indicators*; World Bank (2005) *World Development Report 2006*. Washington: Oxford University Press, Table A4

**Table 2.
Income and education inequality measures in Latin America.**

	Income			Education		Share due to	
	Year	Gini index	90/10 percentile ratio	Year	Gini index	Location	Gender
Argentina-U	2001	0.51	13.71	2001	0.22	--	0.00
Bolivia	2002	0.58	29.65	1998	0.38	0.16	0.2
Brazil	2001	0.59	16.25	2001	0.39	0.01	0.00
Chile	2000	0.51	10.72	2000	0.23	0.08	
Colombia	1999	0.54	15.00	2000	0.36	0.13	0.00
Costa Rica	2000	0.46	9.65	2000	0.30	--	0.00
Dominican Rep	1997	0.47	9.17	2002	0.38	0.04	0.00
Ecuador	1998	0.54	16.09	1988-9	0.33	0.12	0.00
El Salvador	2002	0.50	15.88	2000	0.45	0.13	0.00
Guatemala	2000	0.58	16.81	1998-9	0.54	0.07	0.01
Honduras	1999	0.52	11.72	2001	0.45	0.11	0.00
Mexico	2002	0.49	11.87	1999	0.34	0.09	--
Nicaragua	2001	0.40	6.52	2001	0.49	0.13	0.00
Panama	2000	0.55	18.65	2000	0.27	0.11	0.00
Paraguay	2001	0.55	18.26	2000	0.35	0.12	--
Peru	2000	0.48	14.6	2000	0.30	0.14	0.01
Uruguay-U	2000	0.43	7.73	2000	0.24		0.00
Venezuela	2000	0.42	7.94	2000	0.30	0.01	0.00

Source: World Bank (2005) *World Development Report 2006*. Washington: Oxford University

Press, Tables A2 and A4.

Table 2 shows the income Gini coefficient and the education Gini coefficient for the countries of the region. It can be noted that there appears to be no direct consistency between the two except that in all cases with the exception of Nicaragua, the education Gini is always below that of income. These are two different dynamics, of course, where education appears as more malleable and ahead of the labour markets and society at large. For the World Bank this disconnect “between the convergence in education and the divergence in incomes is that education is not translating into human capital and that the rise in per capita schooling explains only a small part of growth in output per worker” (World Bank, 2005, p.68). More directly connected to our focus, Table 2 (columns 6 and 7) also shows that gender is less relevant in the region in terms of inequity (measured by years of education). In fact, gender parity was attained in Latin America in the 1980s. Today because of boys’ higher grade repetition and lower secondary level survival rates, girls have become the majority at the secondary and tertiary levels, (EFA, 2006). Location, instead, contributes a greater share to inequality, which is higher in the Andean countries (Bolivia, Peru and Ecuador) and some of the Central American ones (Nicaragua, El Salvador), than the rest. This is a relevant factor when considering decentralization policies.

The educational agendas of such different societies clearly diverge in terms of levels of development and inequalities, while facing similar secular challenges of globalization in the information age. That is, many countries confront an *inclusion agenda*, with per capita incomes of less than US \$4,000 PPP, with a third or more of their population living in rural areas and with half or more of their youngsters not completing secondary. Others, meanwhile, have per capita incomes around the US\$ 10,000 PPP mark, have only around 15 percent of their population living in rural areas, and have high secondary education completion rates, and so are challenged by the social segmentation of educational institutions and results, thus confronting a *fairness agenda*.

Race, ethnicity and rural residence as factors in educational inequality

There is limited information about the impact of race and ethnicity on educational inequality. However the data indicates that the blacks in Brazil, like indigenous groups and those living in rural locations elsewhere in Latin America, consistently have fewer educational opportunities than the rest, (Reimers, 2000; IPE-OEI, 2007). When school attendance between white and *mestizo*-black-indigenous households is compared in Brazil, whereas both participate in primary schools, there are significant differences of up to two or three years by ethnicity of delays in grade-completion. Mixed, black and indigenous children have a greater probability of facing difficulties in school, (IPE-OEI, 2007, p.120).

Rural location carries greater weight in Central American countries. In Honduras, Guatemala, Nicaragua and El Salvador, more than 40 percent of their populations live in rural areas compared to approximately 10 percent of populations in Argentina, Chile and Uruguay. However in both situations, and using whatever indicator, we find that urban schools show advantages over rural schools in terms of both access and results. Both Bolivia and the Central American countries have exclusion rates of school-age children in rural areas that double those of urban areas, ranging from 7.8 per cent for Bolivia to 18.2 percent for Guatemala. (IPE-OEI, 2007, table 4.2)

2. Educational policies of the 1990s and equity criteria

Around the turn of the millennium, we saw unprecedented public and private changes in education as politicians and policy makers defined education as the key lever for economic and democratic development. In spite of decisive differences between countries, there is a uniformity to this period's policies that is embedded in both secular and political factors. First, state actions in education during this period were deeply influenced by structural-adjustment models and economic liberalization, on the one hand, and cultural pressures brought about by

globalization and the arrival of the information society, on the other. These developments produced the longest period in Latin America's history with elected democratic governments in all the countries of the region. Thus, while the concept of equity was not part of the vocabulary of most military governments of the 1980s, let alone of their policies, the transition to democratic regimes led to the opposite: an explicit emphasis on education as a standard for producing equality of opportunity.

Second, this period was characterized by the growing influence in education of multilateral development agencies, like the World Bank, the Inter American Development Bank, and UNESCO; their influence on government education policies and programs was reinforced by the spread of international tests like PISA and TIMSS. Their aggregate impact has arguably had an isomorphic effect on educational systems, which, independent of national specificities and agendas, needed to react to common worldwide pressures. (Benavot et.al 1991; Schriewer, 2004). In this environment, the educational policies in the period 1990-2006 are characterized by the following common components: 1) expansion and rationalization of expenditures; 2) administrative decentralization; 3) programs that focus on specific population groups; 4) curriculum reform; and 5) evaluation of results, information and accountability, (Gajardo 1999; Kaufman & Nelson 2005; PREAL 2006; Carnoy 2007; Grindle 2007). Their links with equity issues and their impact is the focus of this section.

The evolution and allocation of expenditures.

The level and evolution of educational expenditure are simultaneously a portrait of government priorities and the framework that conditions the sector's expansion and redistribution. In Latin America, this recent period shows both the high priority given to education and rising expenditures. That is, on average in the region public educational expenditure increased from 2.7 percent in 1990 as a percentage of the Gross Domestic Product (GDP) to 4.3 per cent in 2002-03.; it is estimated that when private expenditures are added, the proportion of money now

spent on education in Latin America is around 10 per cent of GDP, (PREAL 2006; Vegas, Petrow, 2007).

Expenditure per student increased at this time in the majority of Latin American countries together with the processes of standardization and rationalization that accompanies the modern management of decentralization. Thus, for example, Chile allocated resources on the basis of an identical subsidy per student across the country and to which are added other pro-equity features. Brazil changed its allocation mechanism, to be on the basis of an annual per student contribution, which leveled the dramatic differences that existed between the states and between municipalities, thereby altering historic patterns of inequality. In Argentina, too, there was, though ineffective, a dynamic attempt to alter inequities among provinces, (Carnoy et al. 2004). And Colombia specified ways by which its decentralized units could spend centrally transferred funds, (Filgueira , Boglialccini and Molina 2006).

Put simply, the greater expenditures and more equal and improved allocation between administrative units and territories, point to both an expansion of educational opportunities and an improvement in their distribution. Both objectives are reflected in the marked increase in coverage and, as will be seen, in a reduction of educational inequalities measured by the educational years completed by different income groups.

In terms of allocation between levels of their education systems, large differences remain between countries. Chile drastically reduced the differences in per-student expenditure between primary, secondary and tertiary education; Mexico experienced steady growth at all levels, thereby continuing unequal patterns, while Brazil maintained bias toward tertiary education, which received seven times more funding per student than did secondary education. (de Ferranti, Perry, et al. 2004)

Decentralization

Recent educational policy has been framed by the process of decentralization itself, based on substantial institutional change, and this decentralization has been an influential component of educational reform. Countries have dealt differently with this transfer of power and responsibility. For example, Chile, Argentina and Brazil make the transfer to sub-national governments; Colombia and Bolivia shifted to combined sub-national and national jurisdictions; Nicaragua and El Salvador make direct transfers to schools, (Di Gropello 2004). However, from the point of view of equity and social cohesion, decentralization has had a broad but contradictory significance. Specifically, it has given rise to a profound change in the functioning of the state and thus in the functioning of education. The historic models of identity and social cohesion based on a common public education are changing as central and vertical control shifts (with great variety among countries) to another model, yet in its infancy, with diversity, horizontal interactions and local control making up its leitmotiv (Iaies & Delich 2007).

For Latin America, educational decentralization signals an historic change. For nineteenth century elites, public education was a fundamental instrument in the creation of the nations and their development, the inculcation of national and moral ideas, a basic pillar for its unity. The idea of a common formative experience, universal and identical for all, which dissolves differences in the mix of the public school, that is organized by the centralized provision of education and its supporting mechanisms of nationally defined institutions, norms, curriculum and teacher training, was based on common principles. The term *normal* -meaning to conform to a type or a standard or norm- is at the centre of the organizing principle of public education; the norm of buildings, school desks and educational materials; normal schools for teacher education; the normative curriculum; the normative bureaucracy and its national role of regimenting educational services, with its legal and bureaucratic logic of equality before the law.

At the beginning of the 1990s, the Economic Commission for Latin America (ECLAC)¹, and UNESCO made a critical diagnosis of Latin America's national systems of education, training, technology and scientific research. Their recommendations were tantamount to a new educational policy paradigm for the region. The judgment was that, while from the end of Second World War to the 1980s there had been substantial, but socially segmented, gains in educational access, those gains had resulted in poor quality education that was unconnected to social needs (ECLAC-UNESCO 1992). At its core was criticism of the institutions, of the management and bureaucracy of school systems, and of their growing lack of connection with the new needs of socio-economic development. Specifically, this diagnosis called attention to the administration of educational systems which "...became so bureaucratic that they closed in upon themselves and answered to no one" and which encouraged a "radical separation between human resources training and development needs". (ECLAC-UNESCO 1992:73).

What emerged from this analysis was a recommendation for decentralization and autonomy of schools from the center (ministries of Education). It proposed changing policies from those promoting homogeneity to those supporting diversity; a complete change from the norms of steady and uniform *top-down* policy responses to *bottom up* initiatives with incentives and institutions encouraging greater system flexibility and with an ability to respond rapidly to changing needs².

The new strategy had competitiveness and citizenship (the latter with an explicit reference to equity and social cohesion) as its key objectives, through the decentralization of the management of educational systems and a more open policy. This strategy received fundamental support with loans from the World Bank and the Inter-American Bank, for projects to improve quality and equity. The rationale reflected the economic reasoning, that educational decentralization leads to (1) improvements in the management of technical and social efficiency; (2) greater information flows to improve decision making by ensuring that principal actors are close to the issues; and (3), improved accountability between the government and the governed or client and agent, thereby neutralizing the capture of educational systems by vested

interests (Winkler & Gershberg 2000; World Bank 2004; Di Gropello 2004; De Ferranti, Perry, 2004; Grindle, 2004)

However, the promoters of decentralization did not consider equity as a goal. In fact, the effects of decentralization are ambivalent in terms of equity. On the one hand, the processes can erode the unifying and equalizing power of centralized systems while, on the other hand, they can create a landscape that favours basic inequalities. Decentralization can bring greater efficiency, participation, and accountability; and this may enhance mechanisms for voicing needs and greater power for the disadvantaged, with potential implications for greater educational coverage, retention, and content relevance. However, these positive effects have to be weighed against highly unequal social contexts and institutions, where the state has a dwindling capacity to provide a level playing field and the local communities differ substantially in terms of their capacities for controlling and supporting education.

A recent assessment of the evaluative literature on decentralization in the region concludes:

“Single-country evidence shows that the impacts of decentralization may vary depending on which actors or institutions have control over which types of decisions. (...) Community and school-based management has proven promising in many of these areas, but like other decentralization policies, these policies can increase educational inequality between communities of differing income levels and management capacities”. (Vegas , Petrow, 2007. pp.151-152)

The tradeoffs between gains in efficiencies and accountability, on the one hand, and increased basis for inequality in societies marked by strong differences in capacities of the state at different levels and in different local contexts, were not made visible and were not, on the whole, considered as part of the political deliberation and decisions about decentralization. Research and discussions on decentralization focused instead on the assessment of gains in efficiency, transfer of powers and accountability issues. The questions of how, and to what extent, decentralization processes have negatively affected people, by weakening central capacities to level the field or close the gaps in educational access and participation by different groups, remain unanswered.

Targeting strategies and compensatory programs

The policies that give precedence to special demographic sub-groups or other special categories are highly important and characterize this reform period. These programs were the direct heirs of priority action and targeting inaugurated in Europe and North America during the 1960s and 1970s, (*Zones Educatives Prioritaires*, in France, *Educational Priority Areas*, in Britain and similar programs in the USA) and they began to be practiced in Latin America a quarter of a century later, coinciding with the end of military governments. These policies presuppose a turnaround in the states' operating framework: from a legal logic centered on principles of equality before the law to a socio-cultural one that aims to differentiate between groups in terms of priority actions and positive discrimination criteria.³ The new paradigm was based on pro-equity socio-cultural criteria that saw students of unequal socio-economic, ethnic or other origins of the students as requiring a differentiated education in order to obtain average learning outcomes. For the first time, programs were established for sub-groups of the population with criteria that included preferential actions.

There is both richness and variety in the types of priority action programs in education, as well as their forms, during the Nineties and post-2000 years (Reimers, 2000; Vegas, Petrow 2007). In general, all aim to reduce the gap between the most favoured and the lowest income groups or those excluded from educational opportunities. The differences are in the strategies (Vegas, Petrow 2007; García-Huidobro, 2005), which include:

- Financial equalization between groups, jurisdictions, institutional categories, (examples – the expansion and rationalization of public expenditure in education with equity criteria between states and municipalities in Brazil and between the provinces in Argentina)
- Greater access to education in poor rural and urban areas, from the construction of schools and more teachers to the use of television in secondary education (*Telesecundaria* in Mexico) or, in general, the expansion of school coverage in rural areas (e.g. the EDUCO program in El Salvador).
- Radical expansion of provision to lowest-income school enrollment of learning resources commonly available to the affluent such as textbooks, school libraries, and ICT. Examples here include the program to overcome educational backwardness in Mexico (*Pare*); the *Escuela Nueva* program in Colombia to enhance the quality of rural schools; the *Plan Social* in Argentina, and, among many others, the program to enhance the quality of the schools with lowest levels of student achievement, the *P900* program

in Chile (which took its name from targeting the 900 poorest primary schools, representing 10 per cent of the total).

- A set of educational mechanisms to decrease the cost of education to poorer families and produce incentives for them and/or the school system; to attract and maintain in school the most at-risk group in terms of repetition and dropping-out. Examples of these policies are: the conditional cash transfer programs *Bolsa Escola/Bolsa Familia* in Brazil and *Progresar/Oportunidades* in México, both of huge scale (affecting 30 to 40 per cent of enrollments in primary education in the case of Brazil). Nicaragua has also increased school enrollments through conditional cash transfers to families. Chile's *Subvención de reforzamiento educativo* involving allocation of per-student differentiated subsidies, or vouchers, to its rural enrollments and also to its most-at risk students from both urban and rural areas.

State efforts to address inequalities, as we shall see, had a distinctive impact on the lowest-income and marginalized groups in terms of both access to and permanence in primary and secondary schools. In terms of 'quantity of education' or completed grades by the different socio-economic groups, these efforts have had a positive impact on the first quintile, the children of the families with parents that did not complete primary education, and the rural poor. Whatever form of identifying exclusion is chosen to be studied, we find that these are the groups that show the greatest advances in access and participation in education during this period in terms of the first level of inequality, defined as being included (or not) in an educational sequence comparable to that of the more favored groups.

Curriculum reforms and inequalities

As with the First World, Latin America's curricular reform of the nineties attempted to respond to the burgeoning of information technologies, globalization, and changes in the knowledge bases of the school disciplines, together with offering new competencies required by democratic citizenship and the economic competitiveness requires in this new contexts (Braslavsky, 2001).

While there are differences between countries, the curriculum challenge has been strongly influenced by the proposals of the international agencies in the field of education, such as UNESCO and the OECD. In general, they emphasized skills as much as knowledge as main objectives: reflexive abilities, critical and creative thought, collaborative work habits and capacity to resolve problems; and development of learner-centered paradigms about teaching

and apprenticeship (Ferrer, 2004). The new curricular prescriptions raised the level of traditional competencies and added new competencies, such as the focus on problem resolution, ICT literacy, and the abilities to work with others. This substantially increasing the formative ambition and complexity of the schooling experience, particularly at the secondary level. Table 3 systematizes some of the shifts towards greater abstraction and complexity, exemplified by the Chilean secondary education new curriculum.

Table 3.
Curriculum reform: moves to increased abstraction and complexity in secondary education; Chile

Competencies	Contents	FROM	TO (and/or)
-Know what	Language	Sentence analysis	Discourse analysis
	Mathematics	Fixed and closed algorithms for calculation	Mathematical reasoning in resolution of applied problems
-Know-how			
-Know-why	History and Social Sciences	Events	Contexts and trends
-Assess	Biology	Organisms and environment	Microbiology
-Judge	Art	Artistic Expression	Artistic expression, knowledge, perception and critical interpretation

Source: author's construction based on Chile's new curriculum for secondary education, in Ministerio de Educación (1998- 2005).

Most of the curriculum reforms have not dealt with the specific learning challenges that face children and young people in poor environments, who are confronted by the need to learn new contents and competencies. It is an unanswered question as to whether the new curriculum increases learning achievements for different groups and whether the greater complexity of the knowledge and competencies is being communicated successfully by schools. The curriculum reforms, while undoubtedly prescribing new material that encourage capacity building for personal growth and a better functioning society, weigh most heavily on teachers. They have to find ways by which the new learning can create opportunities for poorer groups with less cultural capital. The greater variance observed in the learning results of Argentina and Chile between 2000 and 2006, for example (see table 6 later), may reflect the changes in the

curriculum, with the ‘new literacies’ and higher-level learning goals contained in it having perhaps created a terrain for the increased social differentiation of learning results.

Assessment and the potential of increased accountability

During the Nineties, the majority of countries in the region began to evaluate learning results through standardized testing, and some of them participate in the unprecedented wave of international assessments of education (TIMSS, PISA and others). The publication of these results has become an issue in most Latin American countries, principally because they are comparative scores rather than broken down by socio-economic segments the very different results among distinct socio-economic segments. While resented by teachers because of their accountability implications, the tests have an untapped potential to create voice and pro-equity (as fairness) demands, through the growth of better informed publics and their pressures on educational performance by all groups, (Ferrer, 2006; Vegas and Petrow, 2007). We shall come back to this point in the closing section.

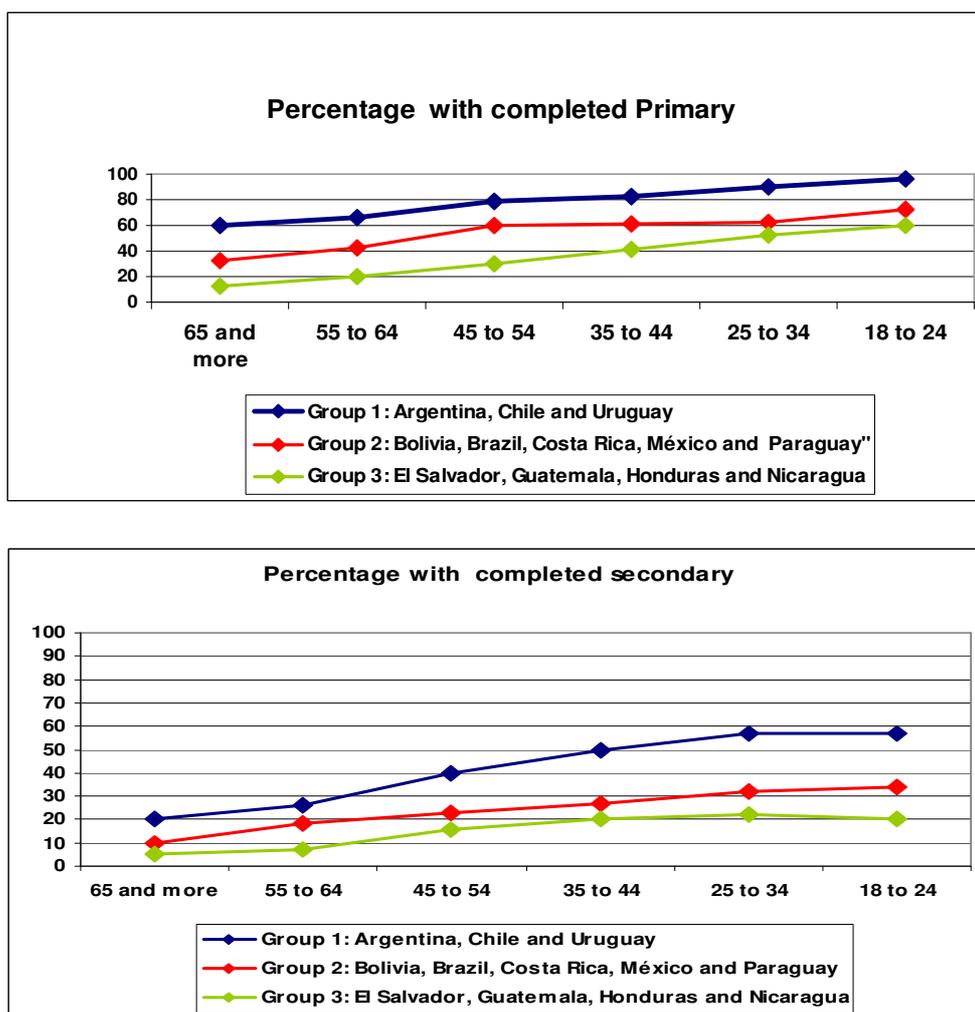
3. Progress in equity of education as inclusion

The social distribution of education in the region has been unequivocally positive; the substantial expansion of education has significantly reduced educational inequality as exclusion. In terms of access to and length of school attendance, there has been progress particularly for the disadvantaged groups. The key measure here is the growing years of schooling achieved and the derived ‘completion of levels of education’, an evolution described in figures 1 and 2.

Figure 1 provides a comparative view of completed education for six generations in three groups of countries, categorized by the pattern of expansion in primary and secondary education. The generations on the horizontal axis and their participation in ‘completion of studies’ mirror the inclusion capacities of the schooling systems of the different countries, from

the decade of the 1940s ('65 plus' generation) to the mid Nineties ('19 to 24' generation). The countries that expanded their education first (and have the greatest coverage today) – Argentina, Chile and Uruguay – have practically universalized primary education (over 90 percent student completion rates), a goal which that they reached in the seventies ('35 to 44' years-old generation); whereas this continues to be a distant goal for the other countries, which at the end of the 1990s reached between 60 (Group 2) and 65 percent (Group 3) of the relevant cohort completing their primary education. With regard to secondary education, the first group of countries show that almost 20 percent of today's grandparents, 40 percent of their children, and just below 60 percent of their grandchildren between 18 and 24 years, have finished secondary school. Only in the nineties did the remaining countries of the region reached that twenty percent of cohorts completing the secondary level. Irrespective of the very different starting and finishing points, we see that the patterns of growth are similar across the region for a fifty-year period of remarkable economic, social, and political changes. French historian Fernand Braudel's (2002:18) "brief, quick and nervous oscillations' that distinguish the history of political events from social history, seems appropriate here: the consistent inter-generational march of education proceeds at a slower but steadier step than political history.

Figure 1: Latin America: Completion of primary and secondary education by age groups, (2006)



Source: IPE, OEI, (2006) Informe sobre Tendencias Sociales y Educativas en América Latina, SITEAL, Figure 5. Figure 2. Latin America (18 countries): Completion of Primary education (young people 15 to 19) and Secondary education (ages 20-24), by household educational environment *a/*, around 2005. (Percentages)

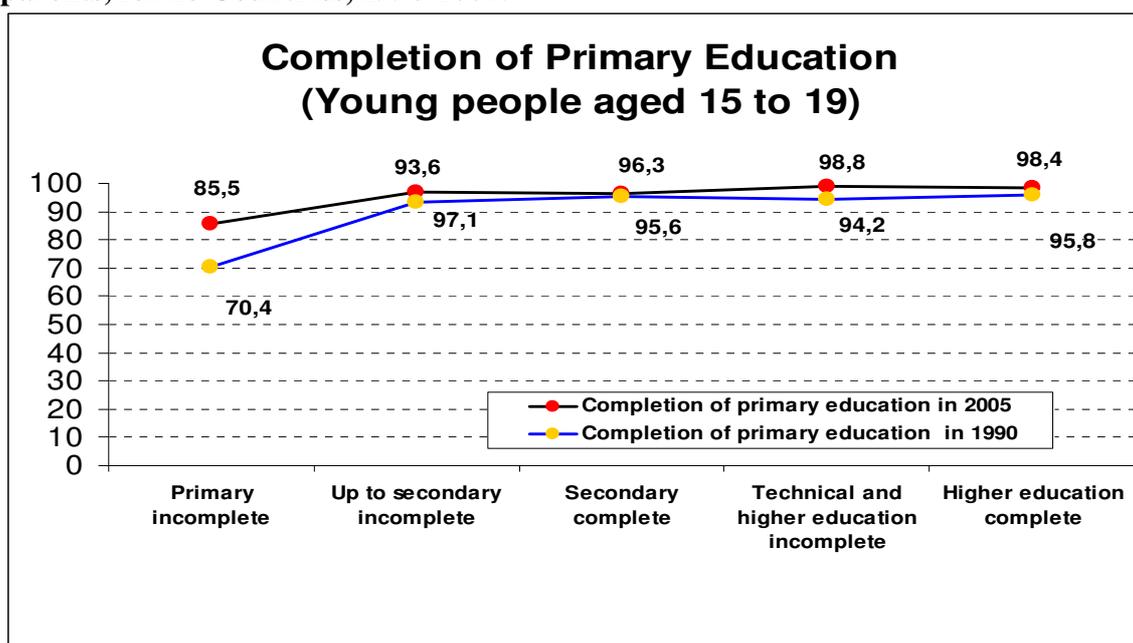
The *longue-durée* up-ward movement of inclusion is shown in more detail (and with particular reference to the last decade and a half) in figure 2, which compares completion of primary and secondary level schooling for 18 countries in the region, at two moments in time, 1990 and 2005, according to five levels of household's 'educational environment' (measured by parents education).

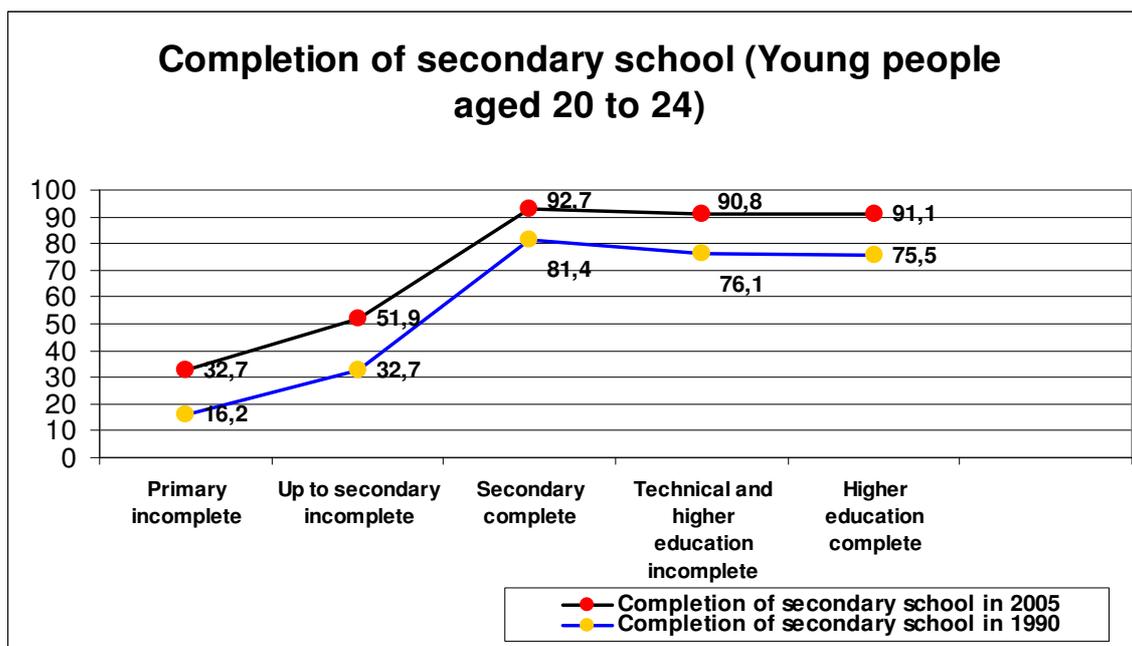
There are the expected differences, with the children of less educated parents showing smaller proportions completing primary or secondary education. At the same time, for both primary and secondary education, the figure shows an increase in the number of students during the last

decade and a half; but while the changes are minimal in primary education, as its universalization was nearly complete in 1990, the numbers are more substantial at the secondary level. In primary education, the increase is most significant for the poorest group, with a 21.4 percentage jump in the 1990-2005 period, (the same figure varying between 0.7 and 3.7 percent for the other groups). This implies a reduction in the access gap compared to other categories, - a change linked to active pro-equity programs across the region, with both targeted programs in education and poverty-reduction programs in other sectors (housing, health, adult education) contributing to this effect.

At the secondary level, there is an upward and substantial movement for all groups, as the comparison between the 1990 and 2005 curves clearly show. The two categories with the largest increases are those with parents that have “primary incomplete” and “secondary incomplete” educational records, with a leap in the proportion that complete studies equivalent to an increase of 102 and 58.7 percent respectively. The other three groups also show increases, in ascending order, from parents with “secondary complete and above” to “higher education complete” (13.8, 19.3 and 20.6 per cent respectively).

Figure 2: Completion of Primary and Secondary Education by educational level of parents, for 18 Countries, 1990-2005.





Source: ECLAC (2007) *Panorama Social 2007*, Gráfico III.7. a/ Average number of years of schooling of the head of household and spouse. Based on special tabulations of household surveys of the different countries. The information referred to the 1990-2005 comparison excludes Guatemala and considers 8 main cities of Bolivia and only the urban areas of Argentina, Ecuador, Paraguay and Uruguay.

The greater access to and permanence in secondary schooling for those with least cultural capital during the 1990s accelerated faster during the 1990s than for other groups that followed an upward trend. As with primary education, we interpret this as a result of targeting strategies and compensatory programs characteristic of the policies of the period. Further, the general increase in secondary education completion rates is an upward movement in the structure of opportunities. It corresponds to Pierre Bourdieu's concept of competition struggles, where "all groups concerned run in the same direction, toward the same objectives" and where "the competing groups are separated by differences which are essentially located in the order of time", with each groups' past represented by the group below and its future in the group immediately above, (Bourdieu, 2003, p.163). This structure shows a closing gap between the less advantaged groups –in cultural and economic capital- and the rest of the distribution, attributable, as said, to the policies of the period.

One can conclude that a fundamental result of educational policy during the last decade and an half has been the increase in coverage and school retention, so that the level of educational inequality (by years of education completed) between the present and previous generations has decreased significantly. The Gini coefficients for education inequality in the present generation (see Table 2, above), represent an improvement of over twenty percentage points compared to its parents' generation, according to Latinobarómetro survey evidence of 2005. (Crouch, Gove and Gustafsson 2007).

4. No progress in fairness: Inequalities in learning and the weight of socio-economic and institutional factors.

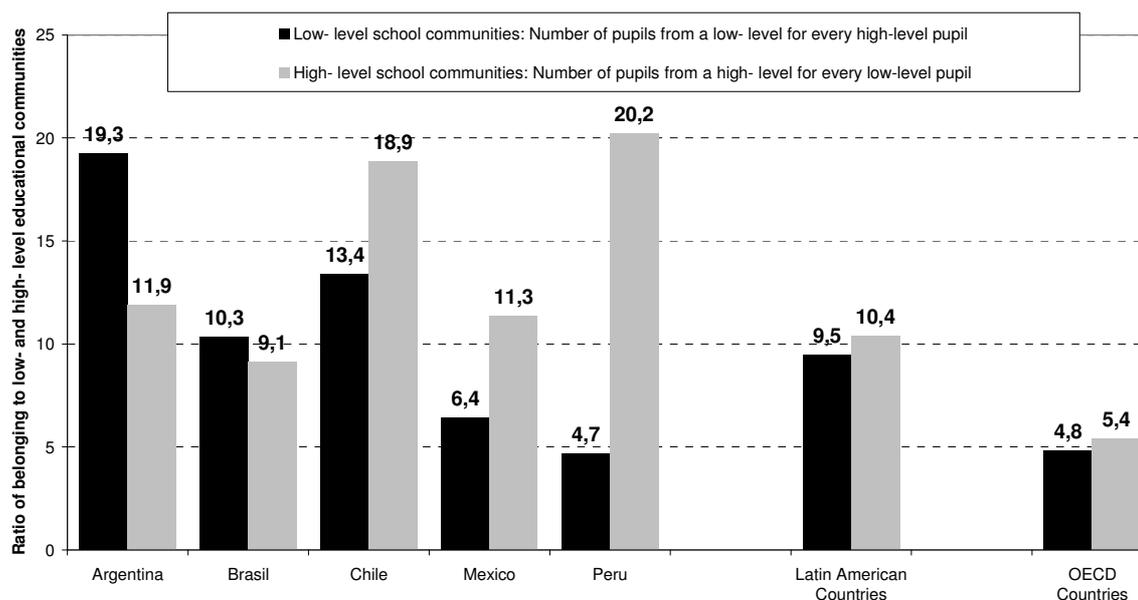
The participation of Latin American countries in international learning tests such as TIMSS, PISA since the latter half of the 1990s, has produced information that, for the first time, allows more rigorous comparative analysis of educational systems and the social distribution of their learning outcomes (Vegas and Petrow, 2007). Equity can be examined with the most demanding of criteria –results in terms of people and their capacities – and judged not only in terms of inclusion but also fairness, or the extent to which learning outcomes (test scores) are made independent of socio-economic, ethnic, location and similar background factors

Social segmentation in schools

School socialization does not only depend on the official curricula or state guidance concerning cultural transmission. It is commonplace to note that a 'silent curriculum' also plays a decisive role, one that has formative consequences in the relations, practices and rituals, that constitute the social texture of school experience. In this regard, the social homogeneity or heterogeneity of the institutions is crucial. Next, the evidence about the Latin American schools' social homogeneity or heterogeneity will be examined as a key dimension for equity and the construction of the socio-cultural base for social cohesion.

Figure 3 offers a straightforward presentation of the level of social segmentation that characterizes schooling in Latin America based on data from the 2000 version of the *Programme for International Student Assessment (PISA)* for five countries in the region.

Figure 3: Latin America (5 countries) and OECD (7 countries): Composition of educational communities by socio-occupational level of parents. (Ratios, Year 2000)



Source: CEPAL (2007) ‘Procesamientos especiales de la base de datos PISA 2000, OCDE (<http://www.pisa.oecd.org>).’

The bars represent the ratios in socio-economically low-level schools (in socio-economic terms): the ratio between pupils from low socio-economic level and those from high levels⁴; and at high-income level schools, the ratio between pupils from the highest quartile in socio-economic level and all low-level pupils. On average, the ratios in the school communities of Latin American countries are double the estimates of “social homogeneity” in the OECD countries -9,5 pupils of low socio economic status for every pupil of high-socio-economic status in poorer schools-, whereas this figure is an average of 4.8 for OECD countries. There are also substantial differences among the five Latin American countries, with Peru, Argentina and Chile having much higher levels of social segmentation in their lower-secondary schools than Mexico and Brazil, although the rate of enrollment in these two countries is significantly lower,

and therefore their intake comparatively more selective and socially homogenous, than in the other countries.

Crouch et al. (2007) have constructed an “inclusion index” based on students responses, as part of PISA 2000 and 2003, to questions about whether the student feels excluded, if he or she makes friends with other students easily, if he or she feels part of the school, if the other students get on well with him or her, and if the student feels alone. They compared Latin American responses to OECD country responses. Latin American students –with the exception of Peru - declared themselves to be more “integrated” than students from OECD countries, perhaps replicating subjectively the social homogeneity of their schooling. Greater homogeneity is the foundation of *bonding* social capital (relations and trust within groups) but it has less weight in terms of *bridging* social capital, or relations and trust, between groups (Putnam, 2000). This raises the question of how well socially segmented schools contribute to the construction of the cultural and dispositional bases of social cohesion (Cox, 2008).

Table 4 sets out the scores for science, mathematics and reading for the six Latin American PISA participants in 2006 (Argentina, Brazil, Colombia, Chile, Mexico and Uruguay), as well as three OECD countries (Germany, Sweden, and the United Kingdom). The results have been ordered according to parents’ educational level, comparing those with completed lower secondary education or less, to those with completed tertiary education. The proportion of students in each category (columns 1 and 5) shows important variations between Latin America and Europe. For instance, there are 28.4 and 53.4 per cent (Chile and Mexico) in the category showing parents with lower secondary education or less, while the proportions found in the three European countries vary between 5.3 per cent (UK) and 15.1 per cent (Germany).

Table: 4
Performance on the Science, Reading and Mathematics PISA 2006 Test
by level of education of parents (1): Latin American and OECD countries.

Countries	Parents with completed lower secondary education or below: ISCED 0,1 or 2 (1)				Parents with completed tertiary education (ISCED 5 or 6)				Difference in scores between the two groups
	Percentage of students	PISA score in Science	PISA score in Reading	PISA score in Mathematics	Percentage of students	PISA score in Science	PISA score in Reading	PISA score in Mathematics	
Argentina	34,2	353	338	344	45,5	422	402	408	64
Brasil	47,4	365	367	342	35,9	416	417	397	50
Chile	28,4	391	397	363	31,0	485	490	456	93
Colombia	42,3	368	361	346	42,7	410	411	394	50
Uruguay	34,4	392	373	385	54,3	452	438	451	59
Mexico	53,4	388	386	383	35,6	437	441	434	55
Average OECD	15.0	446	443	448	46,6	525	516	522	73
Sweden	7.6	456	463	462	69.4	515	519	514	56
U.Kingdom	5.3	450	444	450	51.4	537	516	512	72
Germany	15.1	449	420	446	45.8	543	521	531	101

Source: OECD, PISA 2006. *Science competencies for tomorrow's world*. Volume 2: Table 4.7 a.

(1) Based on students self-report.

What is important in this comparison between the Latin American and the European countries, is that the differences in scores between the two categories of students are similar, albeit starting at quite different levels. The last column shows the score differences for reading competency (column 9) for children with parents having incomplete secondary education and those that have finished tertiary education: it is between 50 and 64 points in the Latin American countries, (with Chile as an exception, with 93 points), but less than the average 73 points for OECD countries. If the data of figure 3 and table 4 are considered together, it is immediately apparent that Latin American schooling institutions do not differ markedly from the most advanced systems in terms of neutralizing the imprints of social class upon learning results; but they do diverge clearly in terms of the social composition (homogeneity-heterogeneity) of their institutions. The following evidence on between and within schools variance in learning outcomes permits to specify more this feature, of critical importance in terms of equity of education as fairness.

Specifically, an examination of the learning outcomes between and within schools, for the different countries and different regions, reveals the national as well as regional profiles of inequality in education. The *between-school* variance is strongly associated with students' socio economic background, (family structure, parental occupation(s), number of books in the home etc.) and institutional features of the school system. In some countries, like Chile, school choice is strongly related with socio economic variables while in other countries, such as Germany, the streaming of students by ability also strongly differentiates schools and segments learning results socially. *Within-school* variance measures the differences associated with the distribution of capacities in any given group of students. In an education system, the greater the proportion of *within school* variance of the total variance obtained for a given student population's performance, the more equitable is the system. Thus, parents can send their children to any school, confident that both its social composition and the learning opportunities it provides will not differ much from those offered by any other school in the system.

Table 5

Between-school and within-school variance in student performance on the Reading scale in PISA 2006.(1)

Source: OECD, PISA 2006, *Science Competencies for Tomorrow's World*, Vol.2, Data, Table 4.1.d

Countries	Total variance in student performance expressed as a percentage of the average variance in student performance across OECD countries	Total variance in student performance <i>between</i> schools (2)	Total variance in student performance <i>within</i> schools	Variance explained by the <i>PISA index of economic, social and cultural status of students and schools</i>		Total variance <i>between schools</i> expressed as a percentage of the total variance within the country.(4)
				<i>Between-school</i> variance explained (3)	<i>Within-school</i> variance explained	
Argentina	158.1	71.0	84.9	35.0	0.8	44.9
Brasil	107.9	47.0	55.3	23.6	0.3	43.5
Colombia	119.7	35.8	83.0	16.8	1.9	29.9
Chile	109.9	62.1	63.2	40.8	0.4	56.5
México	94.2	33.9	48.8	15.9	0.2	36.0
Uruguay	151.4	62.4	87.8	31.4	1.3	41.2
OECD average	100.0	38.4	63.4	21.5	2.7	----
Sweden	96.4	17.0	81.0	7.9	4.0	17.7
U.Kingdom	103.7	21.9	78.5	12.3	4.0	21.2
Germany	126.1	100.5	48.0	63.9	0.5	79.7

- (1) Variance expressed as a percentage of the average variance in students performance across OECD countries. The variance components were estimated for all students in participating countries with data on socio-economic background and study programs.
- (2) *Between school variance*: average of the differences between the average score for each school and that for the country; *within school variance* : average of differences between the individual score and the average score of the student's school. The sum of the between-and within-school variance components, as an estimate from a sample, does not necessarily add up to the total (in Column 1)
- (3) 'Between-school variance explained', or what could be predicted about a school's average performance if the socio-economic background of its intake was known; 'within school-variance explained', or what could be predicted of a student's performance in a school if his/her socio-economic background was known (measured by the PISA index of economic, social and cultural status)
- (4) This index expresses the relative size of the two variances by an intra-class correlation or a coefficient of the *variance between schools* divided by the sum of the *between and within school* variance. (intra-class correlation, *rho*)

Column 1 in table 5, shows that, with the exception of Mexico, the total variance in learning results is greater for the Latin American countries than the OECD country average. Argentina and Uruguay exhibit the largest variance - 50 percent more variance than the OECD average. The three European countries included in the table correspond to the three types of welfare regimes using Esping-Andersen's well known categories: social democrat, (Sweden), with stronger pro-equity and socially cohesive institutions; liberal (United Kingdom), where markets and individual choice play a crucial role in the provision of welfare, and conservative-corporative (Germany), in which the access to welfare is strongly segmented along status differences between groups. (Esping-Andersen, 1990). The differences between these countries in terms of between-and-within-school variances, and their implications in terms of equity, provide an eloquent mirror by which to assess the situation of the Latin American countries.

The between-schools variance (columns 2 and 6) reveals the comparative social segmentation of the region's school systems. In the three southern cone countries (Argentina, Chile, and Uruguay), the variance is over one and a half times that of the OECD average (38.4 per cent). Colombia and Mexico are close to this average, while Brazil is almost nine points higher. But Colombia and Mexico have smaller net enrollment coverages in secondary education (53 and 62%, respectively) compared to 80.8 percent for Argentina, 74.5 percent for Chile and 71.7 percent for Uruguay (EFA-UNESCO, 2006). The smaller total and between-schools variance of

Colombia and Mexico result from the more selective character and the comparatively greater social and educational homogeneity of their intake.

The between-school variances in relation to total variances is markedly lower in both Sweden (17.0 percent) and the U.K (21.9 percent), while that of Germany, with its early tracking of students according to their ability, produces the highest of all the countries represented in the table (100.5). The statistic “variance explained” (column 4) expresses the strength of the association between students’ socio-economic and cultural background factors and their performance -or what could be predicted about a school’s average performance if the socio-economic background of its enrollment were known. In Chile, to take the extreme case among the Latin American countries, that prediction would account for 40.8 percent of the cases, and in Mexico and Colombia, it would account for around 16 percent of the cases. These figures are well above those for Sweden and the UK, and well below the extreme for the German case.

How these relationships are evolving in time is a critical question for policy assessment. .

Unfortunately, there are data for only Argentina and Chile, as the only Latin American countries that participated in PISA 2000 and 2006. Table 6 examines total and the between-school variance for these years.

Table 6
Between-school and within-school variance in student performance on the Reading scale in PISA : Comparison between 2000 and 2006 for Argentina, Chile and OECD countries.

Source: OECD, PISA 2006, *Science Competencies for Tomorrow’s World*, Vol.2, Data, Tables 4.1.d and 4.1.f. Table 6

<i>Countries</i>	<i>Total variance in SP expressed as a percentage of the average variance in student performance across OECD countries</i>		<i>Total variance in student performance between schools</i>		<i>Total variance in student performance within schools</i>		<i>Variance explained by the PISA index of economic, social and cultural status of students and schools</i>			
							<i>Between-school variance explained</i>		<i>Within-school variance explained</i>	
	Years	Years	Years	Years	Years	Years	Years	Years	Years	Years
	2000	2006	2000	2006	2000	2006	2000	2006	2000	2006
Argentina	129.4	158.1	67.9	71.0	61.3	84.9	43.9	35.0	0.6	0.8
Chile	91.1	109.9	56.2	62.1	44.6	63.2	34.7	40.8	0.9	0.4
OECD	100.0	100.0	34.3	38.4	67.4	63.4	21.6	21.5	4.2	2.7
Sweden	94.7	96.4	8.5	17.0	86.5	81.0	5.8	7.9	6.8	4.0
Germany	113.3	126.1	61.7	100.5	53.9	48.0	49.5	63.9	2.2	0.5

As the table shows, both the total variance in student performance and the between-school variance have increased. It is an open question whether this increase (column 1) is associated with changes in the curricula and its implementation, (its greater complexity probably contributing to the dispersion in results), or to changes in the social composition of the student body, owing to the expansion of enrollment and increased inclusion of students from poor groups (or a combination of both). The second column (2) shows the increase in social segmentation between schools: relatively minor in Argentina (67.9 to 71.0 percent) but significant in Chile (56.2 to 62.1 percent). In terms of variance-explained, (column 4) the two countries differ in the direction of the relationship: a drop in Argentina, (43.9 to 35.0 percent) and an increase in the case of Chile (34.7 to 40.8 percent). It is interesting to note that OECD country averages show an increase in the between-schools variance, with increments in the cases of both Sweden and Germany. While there is no change in the strength of association between socio-economic background factors and student and school performance for the OECD as a whole (Column 4), Sweden shows minor and Germany major changes in the indicator of social segmentation of performances during this period.

The 2000-2006 comparisons for Argentina and Chile point in the opposite direction from equity, with larger differences in performances and increased between-schools variances. That this is also the case for the two European countries –with highly contrasting institutional arrangements- questions the nature of the isomorphic processes at stake.

5. Agendas , priorities and the place of equity.

In terms of the most basic equity criterion -access to education- the last decade and a half in Latin America has been one of undoubted progress. Half of the adult population has experienced upward educational mobility with respect to their parents. There has been a reduction in the gap between the poorest and the rest of the population in terms of years of education completed. Furthermore, in intergenerational terms, the inequality index of years of education of the present generation compared to that of their parents, show an important drop.

However, if inequality is considered in terms of learning outcomes, and not only attainment, the evidence shows schooling systems which, if compared with other regions, are socially segmented at much greater levels. Their learning results are ordered (as revealed by the PISA tests results) in forms strongly associated to socio-economic inequalities. The great effect of these socio-economic and ethnic inequalities on the education intake are not being attenuated by Latin American schools, as the analysis of the PISA tests of different years has revealed. Equity as fairness should be a crucial political aim, as improvements in social cohesion, economic competitiveness and governance may be compromised by the observed levels of inequality in educational institutions and processes.

The marked differences in levels of development have produced different agendas. Many countries, as seen in Figure 1, still confront the immense challenge of expanding their coverage in secondary education to include the whole cohort and increase completion rates. The equity agenda in this case means breaking the most damaging barrier of all -that of exclusion. For those countries with high completion rates, the crucial challenge is not inclusion but the socially segmented nature of their educational institutions.

Both agendas should give equity a higher priority; however, the political balance between quality and equity typically favours quality. Quality-oriented policies draw support from society as a whole, connecting to the future and linking national aspirations with a country's international positioning. In contrast, equity-oriented policies have to grapple with socio-economic and other inequalities (or the weight of the past), and the divisive features of any social redistribution of goods, and so will typically garner less agreement and less political support. Pro-equity policies require even more political energy to confront the more entrenched obstacles than do quality-oriented agendas, which are widely recognized as more challenging than the expansion of access. (Grindle 2004; Navarro, 2006).

A central issue regarding equity in education is the relative absence of voices demanding more equity, as the disadvantaged are less likely to see their disadvantage in this domain, and its value is often ignored in policymakers' calculations of costs and benefits⁵. As said, equity policies are more difficult to institute than are quality policies because the former challenge

long-established societal patterns and structures, for both the elite and the poor. Change is likely also to antagonize participants with voice. Furthermore, every step toward progress in quality will be differentially appropriated by the different socio-economic groups.

For more than a century, educational opportunities in Latin America have been identified with opening of schools and provision of teaching posts. Access became paramount, subsuming what went on inside the institutions and how outcomes were distributed. In this respect, the potential of national and international assessments of learning results, and the accountability dynamics that they trigger, cannot be exaggerated. These measures might, in time, provide a basis for new and more powerful voices to be heard and new demands be met in education that transcends the pressures for inclusion and that requires state-policy answers in terms of fairness. These answers should certainly expand and sharpen compensatory programs, but perhaps more importantly, they can act against the social segmentation of public education institutions, which rather than reducing inequalities in society only mirrors them. This presupposes a national commitment to level the playing field of educational opportunity and to support social integration in schools –goals that tend to be subordinated to access and quality agendas.

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¹ An institution set up in the 1950s by the United Nations.

² ECLAC-UNESCO (1992) is probably the most influential document on the thinking of governments responsible for some of the most important educational reforms in the region during the 1990s.

³ According to J.W.Kingdon, “people will see a problem quite differently if it is put in one category rather than another”, and exemplifies with the case of the transport of the handicapped and its classification as a civil rights or a transportation issue and the quite different policy frameworks which follow. (J.W.Kingdon, 2003, p.112) The case of the schools in need of ‘priority action’, is similar: in the old legal framework the problem did not exist or, rather, was invisible; in socio-cultural terms the condition of categories of students or communities with regards to schooling and learning, becomes an issue or policy problem.

⁴ ‘Low- and high-level’ refers here to the first and fourth income quartiles, respectively, in terms of income of parents, measured by the PISA 2000 questionnaires to the students.).

⁵ “The point is that (the often implicit) cost-benefit calculus that policymakers use to assess the merits of various policies too often ignores the long-term, hard-to-measure but real benefits of greater equity”. (World Bank, 2006: p.3)