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ABSTRACT

This paper challenges the commonly held view that Latin America has solved its access problems to primary education. The consequences of this view would be that the policy recommendations of the World Conference on Education for All, held in Jomtien, Thailand, in 1990 would be less applicable to Latin America than to Africa or Asia. The first part of the paper documents how education in Latin America today is characterized by low levels of learning, severe inequities in opportunities to learn, and high repetition rates. The second section examines the changes in the provision of education, which resulted from the impact of adjustment on households, education finance, schools, and ministries of education. The last section of the paper proposes five ideas for an education reform agenda: (1) the need for more resources at the basic levels; (2) a renewed sense of purpose for education, focusing on equity and quality; (3) a recognition that quality is not a uni-dimensional concept; (4) information as a central resource guide and monitor change; and (5) institutionalization of mechanisms for strategic planning, policy continuity, and policy change. The paper draws on information collected from: a survey of education policymakers in Latin America; conversations with educators and policymakers in trips to Colombia, Honduras, Mexico, Peru, and Venezuela; and a survey of 64 rural teachers, 1,250 students and 640 mothers in Honduras as well as documents referenced in the text. (Author/LMI)

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Abstract

This paper challenges the commonly held view that Latin America has solved its access problem to primary education. The consequence of this view would be that the policy recommendations of the World Conference on Education for All that took place in Jomtien last year would be less applicable to Latin America than to Africa or Asia. This paper documents how access to a complete and quality primary education is not universal in Latin America; it examines how most education systems began to decline during the 1980s, as they adopted a short-term perspective to respond to budget cuts stemming from economic adjustment; and it proposes five areas to reform education systems in the region to achieve the objectives set forth in Jomtien.

The paper argues that the main problem with basic education in Latin America is the lack of broad social consensus, recognizing that there is a problem of equity and quality in the provision of basic education. Related to this, and compounding it, is a lack of visible action in the region directed towards major change of the educational systems. The rhetoric of "educational reform" which characterized the 1960s and 1970s is dead, and most education systems in recent years seem content with preserving the status quo.

The first part of the paper documents how education in Latin America today is characterized by low levels of learning, severe inequities in opportunities to learn, and high repetition rates; all of this accompanied by a rhetoric that indicates that the region has "solved the access problem," as if the recommendations of Jomtien were somewhat irrelevant for the region. In addition, there are few stimuli for educational experimentation and innovation to solve these problems.

The second section of the paper examines the changes in the provision of education, which resulted from the impact of adjustment on households, education finance, schools, and ministries of education. With adjustment education, policymakers and administrators were given a task radically different from recent experience in Latin America: managing scarcity. The 1960s and 1970s were decades of economic growth and growing education budgets; managing the sector was thus largely a task of managing that growth. Reductions in education budgets changed the picture. The administrative machinery had a tough job to do, one that called for wiser use of scarcer resources. It is not clear that the people called to do the job brought that wisdom to bear in the choices that were made.

The last section of the paper proposes five ideas for an education reform agenda: 1) the need for more resources at the basic levels; 2) a renewed sense of purpose for education, focusing on equity and quality; 3) a recognition that quality is not a uni-dimensional concept; 4) information as a central resource to guide and monitor change; and 5) institutionalization of mechanisms for strategic planning, policy continuity, and policy change.

The paper draws on information collected from: 1) a survey of education policymakers in Latin America carried out in 1991; 2) conversations with educators and policymakers in trips to Colombia, Honduras, Mexico, Peru, and Venezuela in 1990 and 1991; 3) a survey of sixty-four rural teachers, 1,250 students, and 640 mothers carried out in March 1991 in Honduras; and 4) various documents referenced in the text.

Fernando M. Reimers is an Institute associate at HIID. The author is grateful to Michael Roemer for valuable suggestions he made on this draft of the paper.

IS JOMTIEN IRRELEVANT TO LATIN AMERICA? ADJUSTING EDUCATION WHILE ADJUSTING THE ECONOMY

Fernando M. Reimers

INTRODUCTION

During the 1980s the Latin American countries began processes of economic adjustment as a response to the debt crisis facing the region. Economic adjustment affected the development of education systems by exacerbating old problems and creating new ones, hence compromising long term social, economic, and political development. This paper will discuss the nature of these old and new educational problems in the region, the mechanisms by which economic adjustment influenced them and will sketch a few ideas proposing the need to reform education in the region in light of the recommendations of the World Conference on Education for All, held in Jomtien, Thailand, in 1990.[1] The focus of the paper will be on basic education.[2]

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[1]This conference, sponsored by UNESCO, UNDP, UNICEF, and the World Bank, was attended by nearly 1,500 delegates representing Ministries of Education and development organizations. The conference concluded adopting the *World Declaration on Education for All: Meeting Basic Learning Needs*, which proposed that all countries of the world should achieve universal access to and completion from primary education by the year 2000, while universalizing access and promoting equity, focusing on learning, broadening the means and scope of basic education, enhancing the environment for learning, and strengthening partnerships.

[2]The information on which this paper is based was collected from: 1) a survey of education policymakers in Latin America carried out in 1991 (the quotes used in this paper identify only the persons who did not ask that their names were not used); 2) conversations with educators and policymakers in trips to Colombia, Honduras, Mexico, Peru, and Venezuela in 1990 and 1991; 3) a survey of sixty-four rural teachers, 1,250 students, and 640 mothers carried out in March 1991 in Honduras; and 4) various documents referenced in the text.

I. THE PROBLEM

To my mind the main problem with basic education in Latin America is the lack of broad social consensus recognizing that there is a problem of equity and quality in the provision of basic education. Related to this, and compounding it, there is little visible action in the region directed towards major change of the educational systems. The rhetoric of "educational reform" which characterized the 1960s and 1970s is dead, and most education systems in recent years seem content with preserving the status quo.

The adjustment process which will be discussed later in this paper constrained the ability of education systems to address several fundamental problems. As a result education in Latin America today is characterized by low levels of learning, severe inequities in opportunities to learn, and high repetition rates; all of this accompanied by a rhetoric that indicates that the region has "solved the access problem,"[3] as if the recommendations of Jomtien where somewhat irrelevant for the region. In addition there are few stimuli for educational experimentation and innovation to solve these problems.

1.1. Low Levels of Learning, Efficiency, and Equity

Most children are learning little in primary schools in Latin America, furthermore schools do not seem to contribute to reduce social inequities, as the opportunity to learn is smaller for rural and poor children. A recent study in a sample of rural schools in Honduras found that 1,253 children who were given a multiple option test measuring basic reading

[3]This comment was made repeatedly at a meeting held in the Inter-American Bank in July 1990, as a follow up to Jomtien for the region.

ability obtained, on average, 44 percent of correct responses in grade one and 36 percent of correct responses in grade three.[4] Data from Chile show that while students from families in the highest quintile of the income distribution score 80 percent of the questions in the test correctly, students in the lowest quintile only score 40 percent of them correctly.[5] A test administered to 3,248 primary school students (in grade six) in a random sample of Mexican schools shows that on average they scored only 48 percent of the items correctly in a curriculum test of basic subjects.[6] Students in Mexican private schools obtain higher scores (65 percent) than their counterparts in public schools (47 percent).

1.2. **High Repetition Rates**

Ernesto Schiefelbein, a pioneer analyzing the importance of this subject for the region, has convincingly argued that repetition is the major threat to internal efficiency of educational systems, and a sign of low quality. His latest estimates of repetition for Latin America are 40 percent for first grade and 30 percent for primary education, at a cost of almost $2 billion per year.[7]

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[4] McGinn, N., M. Soto, S. Lopez, A. Loera, T. Cassidy, E. Schiefelbein, and F. Reimers. *Attending School and Learning or Repeating and Leaving*. (Cambridge, Mass.: Project BRIDGES, Harvard University. 1991).

[5]Schiefelbein, E. "Financing Education for Democracy in Latin America." (Santiago, Chile: Mimeog. 1991).

[6]Guevara, G. "Mexico: Un Pais de Reprobados" *Nexos*. (June 1991) pp. 33-44.

[7]Schiefelbein, E. *Repetition Rates: The Key Issue in South American Primary Education*. (Washington, D.C.: The World Bank. LATHR Division, 1988).

The study in Honduras also confirmed that repetition was primarily a function of low levels of learning. Many children who obtain the minimum "official" scores required to be promoted to the next grade repeated (of all repeaters in the sample 72 percent "passed" the final examination) as a result of low levels of reading ability not reflected in the final examination. Among all children who "passed" the final exam, the children who were actually promoted scored 46 percent in an objective test administered to measure reading ability, while those who were made to repeat scored only 27 percent.[8] This explains why true repetition rates in this sample were three times as high as the percentage of children who did not pass the final exam.

The gap between reported and true repetition figures notwithstanding, reported repetition figures in Latin America showed little improvement during the 1980s as can be seen in table 1.

[8]McGinn et al. 1991. Op cit. p. 8.

Table 1. Percentage of Children in Primary Education Repeating One Grade in Latin America

Country	Percentage of Repeaters		Average Annual Growth (Percent)
	1975	1985	1975-85
Argentina	8.70		
Bolivia			
Brazil	15.20	19.70	2.63
Chile	12.50		
Colombia	15.40	17.00	0.99
Costa Rica	6.50	10.60	5.01
Cuba	8.10	3.20	-8.87
Dom. Rep.		12.80	
Ecuador	11.40	8.60	-2.78
El Salvador	7.50	8.40	1.14
Guatemala	14.80	13.10	-1.21
Haiti		9.50	-14.59
Honduras		15.50	
Mexico	11.00	9.90	-1.05
Nicaragua	13.70	15.40	1.18
Panama	12.60	13.10	0.39
Paraguay	15.30	10.60	-3.60
Peru	10.20	14.10	3.29
Uruguay	14.00	11.30	-2.12
Venezuela	2.70	9.40	13.29

Source: Lockheed, M., and A. Verspoor 1989. *Improving Primary Education in Developing Countries: A Review of Policy Options*. Manuscript. World Bank. Statistical Appendix.

1.3. Inequities and the Myth of Access in Latin America

It is commonly heard that the access problem to primary education has been solved in Latin America. UNESCO's most recent survey of the state of education in the region, for instance, says: "Among the achievements are [towards universal primary education]... the

almost universal access to basic education."[9] It is important, however, to qualify this assertion by explaining access to what.

It is true that most of the children of school-going age are enrolled in primary school at some point in their lives in the region. There are, however, great disparities between and within countries in the region in how many children are left out of school. Furthermore, for those who are enrolled, there are also great disparities in the opportunity to learn for children from different socioeconomic backgrounds and for those living in urban and rural areas. As a result, while many enroll in primary school at some point in their lives, many enroll in schools that put them at such disadvantage--compounded by their own social disadvantage--that school failure is the most probable outcome: many of these children learn little, repeat several times, and eventually drop out of school. Hence, the assertion that the "access problem has been solved" should be qualified indicating that this does not refer to access to a *complete* primary education, or to a primary education of *quality*. If access is understood to mean equality of educational opportunity to complete primary education or to learn, the access problem has not been solved in Latin America.

We can see in table 2 that it is not true that access is universal in Latin America. Furthermore, there was little progress during the 1980s. While almost half the countries in the region had at least 15 percent of its primary school age children out of school in the 1980s, the same number of countries have at least 15 percent of its children out of school in

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[9]UNESCO-OREALC. *Situación Educativa de América Latina y El Caribe, 1980-1987.* (Santiago, Chile: UNESCO, 1990), p. 18.

1987. Four countries show deterioration, as net enrollments declined in Brazil, Costa Rica, Chile, and Paraguay.

Table 2. Net Enrollment Ratios in Primary Education in Latin America 1980-87

Country	Net Enrollment 1980	Net Enrollment 1987	Average Annual Growth (%) 1980-87
Argentina	94	100	0.89
Bolivia	80	84	0.70
Brazil	81	77[a]	-0.84
Colombia		81	
Costa Rica	91	86	-0.80
Cuba	97	99	0.29
Chile	98	89	-1.37
Dom. Rep.	71	71	0.00
Ecuador		94	
El Salvador	64	71	1.49
Guatemala	58		
Haiti	41	61[a]	5.84
Honduras	76	89	2.28
Mexico	95	98	0.52
Nicaragua	74	77	0.57
Panama	88	90	0.32
Paraguay	87	85[a]	-0.39
Peru	87	95	1.26
Uruguay		90[a]	
Venezuela	86	92[a]	1.13

[a]Year 1986

Derived from: UNESCO-OREALC, 1990. *Situación Educativa de América Latina y El Caribe 1980-1987*. Santiago, Chile.

The access problem consists not only of the percentage of children who are not enrolled in primary education, but in the fact that those are disproportionately children from poor and rural families. In Costa Rica, for instance, according to survey data from 1982, the

children in the age group seven through twelve with no schooling were 13.3 percent for the lowest income quintile and only 2.6 percent for the two highest income groups.[10] A related fact constraining access is the different quality of the services provided to children from different groups. With regards to public education, as with many other fields of state activity in Latin America, those who have more get more.

The disparities in access to schooling between and within countries of the region can be observed in table 3.

Table 3. Percentage of Children Ages 10-14 without Schooling in Several Latin American Countries, circa 1980

Country	Total 10-14	No Schooling	
			(%)
Argentina (80)	2,456,168	26,196	1.1
Buenos Aires	912,352	5,014	0.5
Cordoba	207,927	1,393	0.7
Chaco	80,780	4,556	5.6
Formosa	36,378	913	2.5
Bolivia (76)			
La Paz	171,820	12,134	7.1
Oruro	37,772	1,207	3.2
Sta. Cruz	86,785	5,244	6.0
Pando	4,405	1,286	29.2
Chuquisaca	41,715	9,110	21.8

[10]World Bank. *Costa Rica: Public Sector Social Spending*. (Washington, D.C.: The World Bank. 1990) p. 19.

Table 3 (continued)

Country	Total 10-14	No Schooling	(%)
Brazil (80)	14,252,521	3,738,960	26.2
Urban	9,073,691	1,301,128	14.3
Rural	5,178,830	2,437,832	47.1
Fed. District	132,646	9,336	7.0
Espirito Santo	248,081	40,513	16.3
Acre	40,561	21,908	54.0
Alagoas	267,435	145,801	54.5
Colombia (85)	3,199,965	760,844	23.8
Bogota	391,259	80,881	13.0
Cundinamarca	159,055	26,827	16.9
Bolivar	154,698	50,086	32.4
Cordoba	120,468	39,308	32.6
Costa Rica (84)	272,008	12,377	4.6
Urban	104,903	2,175	2.1
Rural	167,105	10,202	6.1
San Jose	91,161	2,458	2.7
Heredia	20,459	635	3.1
Puntarenas	34,443	2,533	7.4
El Limon	21,638	1,722	8.0
Venezuela (81)	1,810,432	153,285	8.5
Fed. District	218,981	9,303	4.2
Aragua	109,579	6,295	5.7
Barinas	45,550	6,619	14.5
Apure	27,976	5,069	18.1

Source: OEA. *Deficits Educativos en America Latina*. Patzcuaro. Mexico. 1991.

Between countries access, for children ten through fourteen, ranges from 99 percent in Argentina, to 84 percent in Brazil and 54 percent in Haiti.

In Argentina access ranges from 99.5 percent of the children in places like Buenos Aires to 94 percent in Chaco. In Bolivia the disparities are greater, from 93 percent in La Paz to 70 percent in Pando. In Brazil the table shows that access is much greater in urban

areas (86 percent) than in rural areas (53 percent), ranging from 93 percent in the Federal District to 45 percent in Alagoas. In Colombia access also ranges widely across regions, from 87 percent in Bogota to 67 percent in Bolivar or Cordoba. In Costa Rica access is also higher in urban areas, ranging from 97 percent in San Jose to 93 percent in Puntarenas or Limon. Access disparities in Venezuela illustrate the same point, ranging from 96 percent in the Federal District to 82 percent in Apure.

It should not be surprising that proportionately more people in rural areas have no access to schooling because these areas are least served by the state in providing education. Many of the schools in rural areas have teachers teaching more than one grade (a rare phenomenon in urban schools) and have teachers with less training, supervision, and access to materials. Many of the rural schools also do not offer all grades of primary education. In 1987 in Colombia 23 percent of the urban teachers were untrained vs. 39 percent of the rural teachers; in Honduras the figures were 15 percent vs. 46 percent; and in Nicaragua they were 32 percent vs. 74 percent.[11]

In Peru the percentage of trained teachers (maestros titulados) in primary education ranges from 95 percent in Arequipa (where the reported repetition rate is 11 percent), or over 70 percent in Lima (repetition rates around 10 percent), down to 20 percent of trained teachers in Madre de Dios (repetition rate 46 percent).[12]

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[11]Derived from Table 22, page 53. UNESCO-OREALC. *Situación Educativa de America Latina y El Caribe, 1980-1987.* (Santiago, Chile. UNESCO. 1990).

[12]These figures are for 1985. Tovar, T. *Ser Maestro. Condiciones del Trabajo Docente en Peru.* (Lima, Peru: UNESCO-DESCO. 1989).

Table 4 shows the percentage of public "incomplete schools" (not offering all grades) is much higher in rural than in urban areas.

Table 4. Percentage of Incomplete Schools in Urban and Rural Areas in 1987.

Country	Percentage Urban	Percentage Rural
Bolivia	0	29.6
Colombia	26.2	62.1
Ecuador	26	88.6
El Salvador	3.4	62.8
Panama	2.1	11.3

Source: UNESCO. OREALC. *Situación Educativa de América Latina y El Caribe 1980-1987*. Santiago, Chile. 1990. pp. 34.

1.4. Resistance to Improvements

Perhaps worse than the problems just mentioned is the current "mood" with which policy elites face them. There is so much acceptance of this status quo that one can expect little development--which by definition means an improvement of current conditions--in education in the coming years. Economic adjustment has created such preoccupation with cost-savings that policymakers are inclined to quick and cheap solutions, which some of these problems may not have. As a result, many of these problems (i.e., low levels of learning, inequities in access to a complete education) are perceived as acceptable features of the education system and not as challenges that have to be solved.

For instance, multigrade schools have now become an accepted form of education in rural areas. The study in Honduras on the determinants of grade repetition showed that in multigrade schools children had a significantly lower opportunity to learn and a much higher

probability to repeat. In first grade, controlling for the socioeconomic background of the students, when the teacher teaches more than one grade repetition rates increase by 15 percent. In multigrade schools achievement levels are lower, school days shorter and teacher absences more.[13] Accepting those types of multigrade schools as something that cannot be changed means that the type of education a child will receive is determined by the area in which the child is born. If the last sentence ended "determined by the color of the child's skin, or her religion" most people would see this as a form of discrimination that should be eliminated. Why accept current discrimination against rural and poor children?

II. THE PROCESS

This section will examine how economic adjustment affected the provision of education through its impact on households, education finance, schools, and ministries of education.

2.1. Impact on Households

Economic adjustment[14] meant increased unemployment and increase in the cost of living as subsidies, such as in food, were slashed. The last UNDP Human Development Report indicates that in Latin America between 1980 and 1985 there were 4 million jobs less

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[13]McGinn, N. et al. 1991. Op cit.

[14]This section does not attempt to separate adjustment that was "policy induced" vs. adjustment that resulted from changes in circumstances. The intent is simply to note how the incentives that households faced changed. As Michael Roemer points out "adjustment only *caused* these declines if circumstances would not otherwise have caused them." (Personal Communication. July 1991).

than predicted by the trends prior to the adjustment and that unemployment rose by more than 6 percent a year. Adjustment also translated into reductions in real income in households; for instance in the early 1980s real salaries fell by 50 percent in Peru and Bolivia, 30 percent in Mexico and Guatemala, and 25 percent in Venezuela.[15]

The following example will illustrate how reduction in subsidies and in incomes led to reduced private contributions of households to education. At the beginning of this year, the Honduran government began to implement an adjustment program which led to increases in the prices of notebooks, from reductions in subsidies to paper and increases in gasoline prices. Since the transportation component of the cost is higher the longer the distance the notebooks have to travel, this meant prices of notebooks increased 30 percent in urban area, while increasing almost 100 percent in some remote villages. This means the probability that a parent could afford a notebook diminished much more for rural parents than for urban parents.

There is also a growing number of street children and of children who work to contribute to the household economy. There are an estimated 40 million street children in Latin America.[16] In Brazil 30 percent of all children are estimated to be working. Increases in the proportion of time children spend working means less time to study. Student time in school is an important predictor of learning and on whether a child will be promoted or have to repeat. The findings from the survey in Honduras show that, according to reports from the

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[15]UNDP. *Human Development Report: 1990.* (New York: Oxford University Press. 1990), p. 35.

[16]UUNN. *The Situation of Youth in the 1980s and Prospects and Challenges for the Year 2000.* (New York: UUNN. 1986).

mothers, children who were promoted from grade one to grade two missed, on average, fifteen days the prior year, children who repeated missed twenty-five days and children who dropped out missed sixty-seven days.[17]

Survey data from Uruguay suggest that absenteeism is higher among poorer children and among children with parents that have lower levels of education, as seen in the table 5.

Table 5. Percentage of Fourth Grade Students that did not Attend Class for 15 or More Days during the School Year in a Sample of Schools in Uruguay in 1990

Father's Education	Income Distribution	
	Lower Half	Upper Half
Incomplete Primary	28.8	20.3
Complete Primary	27.1	13.7
Lower Secondary	21.1	12.8
Upper Secondary	4.8	5.6

Source: CEPAL. *Que Aprenden y Quienes Aprenden en las Escuelas Uruguayas*. Montevideo 1991, p. 75. Cited in Schiefelbein, E. "Efficiency and Quality of Latin American Education" June 1991. Manuscript.

This impact of the adjustment on households has clear consequences for the opportunities for children to go to school. For instance, in Venezuela there have been increases in the dropout rates since 1978; among dropouts the percentage of children aged ten to fourteen who report they do not go to school for economic reasons (in a household sample survey) increased from 15 percent in 1978 to 23 percent in 1985.[18]

[17]McGinn et al. 1991. Op cit.

[18]Cartaya, V. and H. Garcia. *Infancia y Pobreza. Los Efectos de la Recesión en Venezuela*. (Caracas, Nueva Sociedad), p. 110.

According to a senior official in the Costa Rican Ministry of Education dropouts for grades seven, eight, and nine increased during last decade; 46 percent of the students in those grades have left school to take up jobs.[19]

Hardship at home was compounded by hardship in the education system. In the words of Carlos Lara, who grew up as a gamin in Bogotá, recently visiting the US writing a report for Servicio Juvenil: "Here [in the US] all the kids are supposed to be in school...In Colombia, there is no space for half the children, so who knows when a kid is playing hooky?"[20]

Economic adjustment changed the scenario in which education policy decisions are made. This change led to a decline in the fiscal and political support for education. It also led to distortions in the distribution of expenditures inside the education sector. The cuts seem to have been implemented according to criteria of short-term political feasibility to the detriment of long-term efficiency and equity.

The impact of the adjustment has been disproportionate in the lower levels of education, in nonrecurrent expenditures and in nonsalary items. Long-term increases in inequality will result from the impact in basic education. A loss of internal effectiveness will result from the change in the mix of inputs: teachers without teaching materials, dilapidated buildings, students without scholarships, and lack of supervision and training for teachers.

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[19]Zaida Sánchez Moya. Directora División de Planeamiento Educativo. Ministerio de Educación. February 1991.

[20]Breslin, P. "Can Development be a Two-way street." *Grassroots Development*, 14 (2). p. 29.

2.2. Impact on the Education System

2.2.1. Reductions in Resources for Education

What has been the impact of the adjustment programs implemented during this past decade in government financing of education? Table 6 shows that the average annual rate of growth of constant expenditures per capita in education is higher before 1980 than in the 1980s. On average (unweighted) per capita expenditures in education increased by 4.29 percent per year between 1975 and 1980, while they decreased by 6.14 percent between 1980 and 1985. The progress in educational finance made in the 1970s was undone in the 1980s. While expenditures in education per capita decreased in real terms in five countries between 1975 and 1980, they decreased in sixteen countries between 1980 and 1985. For instance, Argentina spent $63 per person in 1975, $94 per person in 1980, and $39 per person in 1985. Bolivia spent $24 per person in education in 1975, $29 per person in 1980, and $2 per person in 1985.

The only exceptions to this trend in 1985 were Honduras, Nicaragua, and Panama. It is possible, however, that this situation has worsened in recent years. An advisor to the Nicaraguan Ministry of Education explains:

> Since 1985 we had economic adjustment programs which became harsher in February 1988 and June 1989. Since 1988 we have had economic adjustment. These have affected education severely, as shown in a reduction of education expenditures as a percentage of government expenditures from 12 percent-14 percent to less than 10 percent in 1989.[21]

[21]Juan Bautista Arrien. Secretario Permanente de la Comisión Nacional de Cooperación con la UNESCO. Nicaragua. March 1991.

Table 6. Total Government Expenditures in Education Per Person in 1985 $US in Latin America, by Country, 1975-85

Country	Expenditure Per Capita in Constant $US 1985			Annual Growth Rates (Percentages)		
	1975	1980	1985	1975-80	1980-85	1975-85
Argentina	63.37	93.60	39.28	8.11	-15.94	-4.67
Bolivia	24.07	28.75	1.88	3.62	-42.03	-22.50
Brazil	42.69	59.10	58.92	6.72	-0.06	3.27
Chile	43.98	65.28	51.98	8.22	-4.45	1.69
Colombia	22.01	22.33		0.29		
Costa Rica	65.85	123.88	65.13	13.47	-12.07	-0.11
Cuba						
Dom. Rep.	15.24	17.10	12.06	2.34	-6.75	-2.31
Ecuador	35.59	71.38	44.30	14.93	-9.10	2.21
El Salvador	34.28	36.31	22.87	1.16	-8.83	-3.97
Guatemala	19.24	27.12	21.19	7.11	-4.82	0.97
Haiti	3.62	6.19	4.48	11.31	-6.28	2.14
Honduras	26.83	27.34	33.14	0.37	3.93	2.13
Mexico	70.60	67.76	56.77	-0.82	-3.48	-2.16
Nicaragua	37.97	32.56	48.95	-3.03	8.49	2.57
Panama	103.35	101.69	108.72	-0.32	1.35	0.51
Paraguay	9.98	14.11	12.70	7.17	-2.08	2.44
Peru	35.16	31.54	23.32	-2.15	-5.86	-4.02
Uruguay		46.01	42.27		-1.68	
Venezuela	206.25	193.73	185.66	-1.24	-0.85	-1.05
Unweighted Average Growth				4.29	-6.14	-1.34

Derived from: United Nations: *Demographic Yearbook: 1984, 1987*, and Lockheed and Verspoor 1989. *Improving Primary Education in Developing Countries: A Review of Policy Options*. Manuscript. World Bank. Statistical Appendix.

But the impact of the adjustment does not stop with disproportionate reductions of the education budget. These reductions in turn are accompanied by changes in the structure of the education budget, changes which are not justified on efficiency and equity grounds.

Because of institutional and structural rigidities in the formulation of the education budget, and because budgeting is not only a technical activity but a political one, some items

are easier to cut than others. Particularly affected are school buildings, and hence the percentage of recurrent expenditures increases in most of the countries between 1980 and 1986. Expenditures in teaching materials also suffer disproportionately as do the lower levels of education.

One of the respondents to the survey (a director of primary education in a ministry) summarized the impact of budget cuts in his country in this way:

a. We stopped opening new schools.
b. There was a freeze in all hiring of new teachers and administrative staff.
c. Capital expenditures (which pay for construction, equipment and repair of school buildings) fell below 1970 levels.
d. There were no funds for research or staff development.

2.2.2. **Impact on Schools**

The impact of these reductions in education expenditures was felt in schools: buildings deteriorated, and teachers felt the economic crunch and had more reasons to spend time in competing activities (strikes sometimes), as they saw teaching supplies vanish. This impact too worsened equity. Here lies the main explanation why so little learning takes place in schools, why so many children repeat, and why so many leave school without finishing primary education. With adjustment, education gradually left many schools.

Teachers, like other professionals, felt the economic crunch as their salaries did not keep pace with increases in the cost of living. In many cases, this impact was larger for teachers than for other occupations with comparable levels of education. In Costa Rica average teacher salaries in 1986 were 66 percent of salaries in 1980, while in the rest of the

economy salaries in 1986 were 23 percent higher than in 1983. In Mexico salaries of primary school teachers decreased 34 percent between 1983 and 1988, and 40 percent for school headteachers.[22] In Argentina teacher salaries in 1982 were 55 percent of their 1980 levels, regaining in 1987 97 percent of 1980 levels. In Bolivia teacher salaries in 1982 were 34 percent of their 1980 levels and increased to 73 percent of this level in 1987. In Guatemala salaries in 1987 were 54 percent of their 1980 levels.[23] The impact in salaries is both short-term (increasing incentives for teachers to supplement salaries with other occupations) and, perhaps more importantly, long-term, as salaries have a signaling value which influence career choices of prospective candidates to the teaching profession. It should not be surprising that future generations of motivated and talented high school graduates in Latin America saw teaching as one of their last career choices.

One of the respondents to the survey in the Ministry of Education in the Dominican Republic replied: "Many teachers left their jobs and went to other sectors such as customs, tourism and the private sector, other people left the country, looking for better economic opportunities."[24]

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[22]Prawda, J. *Logros, Inequidades y Retos del Futuro del Sistema Educativo Mexicano.* (Mexico. Editorial Grijalbo. 1989), p. 197.

[23]Corvalán, A. *El Financiamiento de la Educación en Período de Austeridad Presupuestaria.* (Santiago. UNESCO-OREALC. 1990), p. 40.

[24]Zeneida de Jesús Contrera. Directora de Investigaciones. Ministerio de Educación. República Dominicana. March 1991.

In Nicaragua, since 1988--when the government began implementing adjustment programs--some 3,000 teachers left their jobs.[25]

The increase in teacher strikes reduced the number of days available for learning, a critical input to promote student achievement in schools. In Colombia, the current school year began with a five-day national teacher strike.

But the effects of economic adjustment went beyond teacher salaries. Other items of expenditures went out first, such as allowances for school supervision, training, and school supplies. Teachers received increasingly less support to teach, many of them had to buy their own chalk: in Honduras 30 percent of the teachers interviewed in rural schools said they did not receive chalk from the Ministry. In Guatemala the Vice-Minister of education explained that the main effects of adjustment on primary education were: "Almost elimination of school and cleaning supplies such as chalk, paper, and brooms. Reduction in maintenance services for schools. Extended spacing in the distribution of teaching materials such as textbooks."[26]

2.2.3. Impact on the Administrative Machinery

With adjustment, education policymakers and administrators were given a task which was radically different from recent experience in Latin America: managing scarcity. The 1960s and 1970s were decades of economic growth and growing education budgets, managing the sector was thus largely a task of managing that growth. Reductions in

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[25]Juan Bautista Arrien. Asesor Permanente de la Comisión Nacional de Cooperación con la UNESCO. Nicaragua. March 1991.

[26]Luis Rodolfo Girón Figueroa. Vice-Ministro de Educación. Ministerio de Educación. Guatemala. March 1991.

education budgets changed the picture, the administrative machinery had a tough job to do, one that called for wiser use of scarcer resources. It is not clear that the people called to do the job brought that wisdom to bear in the choices that were made. Confrontation with teachers became more frequent and the Ministry lost its ability to support their work in schools. There was a reduction--freeze in some cases--in the creation of new jobs in education and a general decline of management procedures, e.g. in Guatemala the average time to appoint staff increased from two to eight months.[27]

The budgeting Director in the Ministry of Education in the Dominican Republic explained: "Relations between the Ministry and teachers became conflict ridden, which led to a great many days of classes lost because of teacher strikes."[28]

Budget cuts contributed to emphasize a short-term perspective, which devalued activities such as research, analysis, and planning concerned with long-term impact of policies. All the people I interviewed on this subject replied that research in the ministries lost importance during the 1980s. A director of basic education replied: "There is no educational research left in this country." In the absence of research and analysis, ministries increasingly lost touch with the reality of schools. This was especially important as this reality has in turn been transformed by adjustment. The budget director of the Ministry of Education in the Dominican Republic explains: "Education research was affected to such a

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[27]Luis Rodolfo Girón Figueroa. Vice-Ministro de Educación. Guatemala. March 1991.

[28]Modesto Ozuna. Budget Director. Ministerio de Educación. Dominican Republic. March 1991.

degree that we could not carry the sector assessment we had planned for 1988. The last assessment we have was done in 1985 with data from 1983."[29]

Innovation or reform became increasingly absent in ministries of education confronting reduced budgets, in the rare cases in which reforms were initiated or continued, resource constraints made their implementation more difficult or distorted. For instance, Colombia continued the administrative decentralization which had been initiated in the 1970s, moving it one level further (from departments into municipalities). A law was passed that transferred administrative control of primary education to the municipalities by 1991, but by May 1991 many of the municipalities refused to accept this new responsibility.[30]

The minister of education from another country, which decentralized educational management, explained:

> Educational management was forced to give greatest priority to cost savings, diminishing the quality and equity of the services provided. Policies such as educational decentralization were distorted also for this reason.

One of the questions in the survey administered to education policymakers in Latin America on which this paper is based asked the question "Was educational management

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[29]Modesto Ozuna. Director of Budgeting. Ministry of Education. Dominican Republic. March 1991.

[30]At the invitation of the Ministry of Education I had the opportunity to discuss this subject with officials at the federal, departmental, and municipal levels in May 1991. People I interviewed at the municipio and department level explained that the major source of resistance to accepting the "municipalización" came from the perception that there was a lack of new resources to support this new activity.

affected by economic adjustment in your country; how?" The answer of the director of research for the Ministry of Education in the Dominican Republic summarized many of the other responses: "Educational managers were affected in similar ways teachers were. Low salaries led to strikes, closing down schools. In some instances this led to the demotion of ministers of education."

Teachers responded to reductions in salaries with tough bargaining strategies which included strikes and turmoil. This created a climate of confrontation between teachers and managers. The leadership initiatives in several countries suggest that education was considered as much an employer of large groups of organized workers as an instrument to promote learning. The current Mexican president appointed a former minister of the interior --internal security--known for his political ability, as minister of education; the president of Venezuela appointed a former manager of one of the largest industries--a brewery--better known for his managerial skills than for his expertise in education. The first minister of education of the current Peruvian government resigned during her first few months in office over disagreements with the Minister of Finance in which she had identified with the teacher unions--of which she had been a leader in the past.

III. THE CHALLENGES

The deprivations that economic adjustment has imposed on education systems, for instance teachers who have no chalk to teach, can be seen as the result of choices made at different levels. At the microlevel, they could express choices made by the teacher choosing to spend her/his salary on food or clothing rather than chalk. At the next level, teachers

without chalk would express choices of an education system that chooses to use diminished resources for salaries at the expense of materials, or that chooses to reallocate scarcer supplies of chalk to preserve the share of urban schools. At a still higher level, there are choices of the state, which allocates resources away from education to roads sometimes or to military equipment others. At an even higher level, are choices of an international financial system, which values the servicing of debt more than chalk in classrooms of rural schools.

Of course, at each instance the degrees of freedom for the choice that is made are constrained. For instance, the high recurrent and wage shares in education budgets limit reallocations to teaching materials, and allocations between levels sometimes are constrained by laws giving a fixed percentage of the national budget to universities. But legal, political and institutional constraints also express choices, as do assumptions about what the possibility frontiers for educational change are. For instance, the now popular public expenditure reviews at the World Bank tend to assume that reallocations within the education sector are easier than reallocations between sectors. The result is that overall efficiency may suffer when a country has to choose between accepting that all of its rural children will have to go to multigrade schools or a decline in the quality of its institutions of higher education, while the number of soldiers or the amount of resources spent in military equipment remains unchallenged.

Education reform is, in my view, the only way Latin America can get out of this quandary. Gradual adjustment to the new economic realities will only continue the decline observed during the 1980s. Only major reforms can counter the inertial decline that is in

motion in the education systems of the region. I would like to propose five ideas for an education reform agenda.

3.1. Education reform will require more resources.

3.2. Education needs to recover a sense of purpose. Two of the guiding principles should be equity and quality.

3.3. Quality is not a uni-dimensional concept. The instructional processes that lead to increases in the opportunity to learn require a minimum package of inputs beyond a certain threshold.

3.4. Education reforms should have information as a central resource to guide and monitor change. Changes in the type of information that has a bearing in educational decisions and management and in how it is used are one of the components of the needed reforms.

3.5. Mechanisms for strategic planning, policy continuity, and policy change must be institutionalized.

3.1. Resources

Reforming education systems to make them more efficient and more equitable is going to require more resources, at least in the initial stages of the reform. Of course, those should be weighted against potential savings from reduced inefficiencies. It is known for instance that repetition rates should be reduced; they mean wasteful use of resources and may lead children to dropout. But reduction in repetition rates is unlikely unless some resources

are invested to learn why children repeat and then to design and put in place interventions to improve the quality of education. The agencies that are in charge of implementing the agenda designed at the World Conference for Education for All in Jomtien have recognized this need for more resources in education. Additional alternatives are to set up special funds for educational initiatives financed with debt-for education swaps; along the lines of debt-for-nature swaps, this could finance specific initiatives which improve equity, such as the schools Fe y Alegría, and simultaneously alleviate the burden of servicing interests with foreign currency. The international community could facilitate this by extending swaps from debt to private banks to debt with multilateral institutions. Effective debt reductions and rescheduling could also help in theory, but the question is whether they would reduce the pressures on the central government to take resources away from education.

3.2. Sense of Mission

The education sector needs to recover a sense of purpose, to answer the question education for what? That means developing capacity for national systems to do the kind of open-ended planning that could answer that question. It is also important that the answer to this question does not change every time the president or the minister of education changes. One option is to develop the "Consejos Educativos Nacionales" (National Education Councils) as a vehicle to produce consensus on the goals and objectives that should drive the sector in the medium term.

The educational reforms should have increased learning and increased access to learning as the main driving principles. If education is to take on the challenge of

contributing to balanced--as opposed to dualistic--development, it is imperative at this time of adjustment to focus on rural areas and the needs of those groups most affected by economic austerity.

The amount of learning that takes place in schools needs to increase. At a time when analysts in the more advanced countries are returning to education as the critical factor to increase the opportunities for people to participate in increasingly technological economies,[31] Latin America needs to increase the productivity of its schools. More has to be learned, and more people need to have access to quality learning.

3.3. Quality

Focusing on learning means that educational quality has to be emphasized in these reforms, while recognizing that quality is not a uni-dimensional concept. This has implications for the kinds of indicators that are developed to measure or monitor it and for the types of interventions that are designed to promote it. For instance it is important to recognize that effective learning requires a minimum package of inputs. Additional interventions may increase opportunities to learn if that package is in place, but if certain inputs are below a minimum threshold it may be very difficult for a single intervention to have an effect. This idea is based on the notion that learning in schools is helped by additional inputs (textbooks for instance) but also by the interaction among various inputs. For example, textbooks may not have the desired effects if teachers do not have chalk to

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[31]Reich, R. *The Work of Nations: Preparing Ourselves for 21st Century Capitalism.* (New York: A. Knopf. 1991).

teach, or the number of blackboards may contribute little to learning in single-grade classrooms but may be a critical factor in multigraded schools. This suggests that initiatives for school improvement should focus on the context, and in the interactions between the core elements of the initiative, as well as in the presence or absence of other elements in schools. In Honduras, for example, an international donor has been developing textbooks and teaching guides that are less effective than they could be because they assume a teacher teaches only one grade, while only a few--predominantly urban--teachers are in this fortunate position.

3.4. A Crucial Role for Information

The importance of context suggests that to design effective policy intervention, at a time when the context of schools is changing, the ministries cannot afford ignorance about the reality of schools and teachers. Education research can provide this type of information. In particular, three types of research could help:

- Formative Evaluation. It is not necessary for an educational innovation to get it right at the first shot, but things should be tried out, and feedback from teachers and students should go back to improve the design of the innovation. In the school survey in Honduras many teachers complained that the textbooks had "foreign words" and themes; for instance, a book used one term to refer to a banana that is only used in the capital city, while a different term is used in the rest of the country. Similarly, the first lesson in the social studies book, on which other lessons build, had a story about a circus and clowns, while teachers in rural areas indicated that to their children clowns were a foreign concept. There were more serious questions raised about the content of the math textbooks, relying heavily

on set theory and geometry which primary teachers said they did not understand. When we asked those who designed the books if they had tried them out, they explained that they had tried them in a few schools in the capital city and that the books were of very good quality because they were all developed by very knowledgeable university professors. Teachers' views are critical information to improve educational innovations.

- Survey Research. Surveys can help inform policymakers about what is really happening in schools and classrooms. They can also help the education system identify excellence within the system and the mix of existing inputs and processes that maximizes effectiveness in the schools. Survey information could be very valuable to educational policymakers who have no background or direct knowledge of the type of schools that characterize the education system they are trying to manage.

- Experimental Research and Innovation Design. Some of the persistent problems may require interventions beyond what the education system is currently doing, so survey research or evaluation will not identify those options. For instance, it may be that reducing repetition rates calls for new initiatives in teaching or evaluation methods. Small scale, controlled experiments could complement the kind of knowledge that can be produced by large scale surveys. There are also new challenges that call for new solutions--for instance, development of values and moral education curriculum, the expansion of the drug industry, the pervasiveness of corruption and abuses of the law, and the resurgence of democracy in the region--are some of the fundamental issues that require attention of school systems of contemporary Latin America. Teacher training is another area that may need innovative solutions. It is clear that the productivity of teachers needs to be increased

(especially given how little was done in this field during the last decade), but it is less clear that expanding existing forms of training will help. Survey research could find that teacher training does not contribute to increased learning, but one should not conclude from this that teacher training could be ignored as a policy domain, but that existing forms of training need to be revised.[32] "Escuela Nueva," a program for multigrade rural schools in Colombia, has developed new ways to train teachers which include demonstration centers and learning by doing which may account for a good part of the success of this innovation.[33]

Key in all of this is to have information that will close the distance between the policymaker and the classroom. This distance is large enough with policies designed in the capital cities of countries that are so diverse and in which many in the ministry have little time to look at what goes on in the schools most children attend. The result is an urban bias in policy and measures which are not responsive to rural realities. For example in Honduras, like in many other countries, there is a school management model based on an urban notion of a school with a full-time teacher and headteacher. Every teacher needs to keep fourteen school registers and records. This is a tremendous burden for single-teacher schools and

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[32]This follows from the fact that survey research can only identify the relative effectiveness of variables given existing levels of variability of those. If the only form of in-service training in this country was a five-day course focusing on pedagogy, survey results indicating that in-service training had no effect on student achievement should be understood to refer only to the type of in-service training currently existing in the country, and not to in-service training in general.

[33]Colbert, V., C. Chiappe, and J. Arboleda. *The New School Programme: More and Better Primary Education for Children in Rural Areas*. (Ministerio de Educación Nacional. República de Colombia and UNICEF. Bogotá, Colombia. 1990).

schools without headteachers, it takes time away from teaching, and reduces the opportunities for children to learn.

If the urban bias implicit in policies designed from the capital city is a problem, a larger problem may result from the increased role bilateral and multilateral agencies are likely to have in this new era of policy dialogue. There are serious risks that a greater role for agencies like USAID, the regional banks, or the World Bank in designing and implementing educational interventions in Latin America will result in diminished efficiency in the use of scarcer resources simply because the decision centers are too far removed from the actual schools and teachers that will be affected by those policy choices.

It is possible, and understandably so, that colleagues working in those organizations may promote interventions with limited benefits for the educational systems on which they are forced. It is possible that we will soon see greater emphasis in testing and in collecting sophisticated datasets on student achievement that allow cross-national comparisons, because those reflect the traditions in which researchers working in these organizations have been socialized. A real question is whether that type of information means something to those responsible for the design and implementation of educational policies in Latin America. For instance, could they learn as much from standard tests applied in different countries as from curriculum-based tests reflecting their own objectives? My point is not that testing is not important; on the contrary, I think it is a powerful instrument to focus attention on learning. But test development, research, and analysis should be done bearing in mind the needs about information of the educational system, so that the results are meaningful to those in charge of policy.

It is also very important to have more information on what is happening in schools and in classrooms, and to bring that information to bear in the policy circles in the capital cities where the ministries are located. More important would be to increase the role local decision-making bodies can play in designing and adapting policies to local realities.

To do that it is essential to develop local capacity to collect information that is relevant to the decision-making process in education. Information has to be more directly linked to improving learning and should also focus on the objectives of the education system. There is an old tradition in education of measuring what is easy and then those indicators becoming implicit objectives of education. One example of this is the way access is understood to be reflected in enrollment figures, so that a child enrolled in school which attends only 10 percent of the school year counts the same as one that attends 100 percent of the school year. In most countries enrollment figures have become, by use, an operational definition of "access," but enrollment figures may hide as much as they reveal about real access to school. More sophisticated indicators of access should include information about student and teacher attendance, duration of the school day and proportion of the school day spent in instructional activities, as these are the factors that influence real opportunity to learn, and not simply having one's name written in the school records.

Efforts should be made to measure what is important, to collect only what matters to the education system, and to try to measure things not easily measured, such as development of moral reasoning or creative problem solving.

3.5. Institutionalize Mechanisms for Strategic Planning, Policy Continuity, and Policy Change

The organizational behavior of ministries of education during the last decade suggests that they are essentially conservative institutions, better equipped to preserve the status quo, to react with short-term adaptations to changes in the environment, than to challenge or change it.

Even when ministers or vice-ministers want to reform change is not easy. Ministers and vice-ministers have typically a time in office--with luck as long as the term of the government in office--too short for a long-term development activity such as education. The results of the best education reform are hard to see in five years and will need more time to mature. It is then possible for the more permanent staff of the ministry to cut off top level executives from influencing what really happens in schools and even from knowing what is happening in schools. This is especially the case where education is a battlefield for partisan politics, and education policymakers of one political party have to rely on line managers (staff, supervisors) from another party. The typical response of many ministers has been to fight partisan politics with more partisan politics (e.g., appointing as many staff from their own party as possible). But this creates a loop without winners, for this strategy serves short-term gains in a field which, by definition, is long-term.

A better alternative to partisan politics might be to develop consensus and to negotiate continuity. This requires establishing arenas where competing views can participate in the negotiations. It does not mean making education "a-political"; it does mean making it highly political, strategically political, achieving complete representation of all groups who might sabotage implementation if they do not participate in policy design.

Special attention should be given to who participates in the design and implementation of education reforms. The "Consejos Nacionales de Educación" (National Education Councils) are one way to attempt policy continuity, so that countries do not go through on-off cycles of political parties who have not yet learned to save resources in an era of austerity.

Top level National Education Councils (Consejos Educativos Nacionales) could be given this responsibility, assisted by Policy Analysis Units. Most countries in the region already have Consejos Educativos Nacionales, although they may have to be restructured to serve the purpose described here: 1) the reforms mean expanding representation of different interest groups; 2) developing strategies of negotiation and creative conflict resolution; and 3) creating Policy Analysis Units that assist the strategic planning of these Consejos so that information about the reality of schools plays a role in the design of policy options.

It is necessary to review the current composition of these Consejos to identify who has participating and who has been excluded. For instance, there has been a lot of nongovernmental initiative in Latin America to provide education and care to street children. People like Father Javier de Nicoló in Fundación Servicio Juvenil in Colombia should have a special place in the Consejos Nacionales. Paradoxically, given the effective role of some religious organizations at providing quality education to the poorest groups, some states are blocking avenues for this type of participation. For instance, in 1988 in Bolivia more than seventy communities submitted requests to the government to authorize opening Fe y Alegría schools, of which only one request was approved. Chile is another instance in which participation in the consejos needs to be broadened, in this country since the "Consejo

Superior de Enseñanza" was created during the regime of the dictatorship, the military are represented in the Consejo while teacher unions are not.

In addition to these consejos, and assisting them, units (or think tanks) could be set up to do education policy analysis. Competent people in the education sector are one of the crucial assets that should be protected from the whims of incompetent politicians. A professional cadre of planners, researchers, and policy analysts should be given space to contribute to policy dialogue. Spaces could well be created outside the government, and international organizations could contribute to foster this type of local initiative.

CONCLUSION

The 1980s has been called the "lost decade" for Latin America. For the education systems the short-term perspective of economic adjustment meant major set backs. Equivocal diagnosis about the problems, such as the myth that Latin America has solved the access issue, the economic consequences of adjustment, and the organizational responses of the ministries to budget cuts, are major explanations of the state of schools in the region today. Major reforms will be needed to go from the current state of education to respond to the challenges of education for the next decade, which in the lucid words of one of the ministers are:

> To pay the 'social debt' which resulted from the adjustment program of the previous government, and to establish a large policy for the incorporation of ...[my country] to the twenty-first century, in terms of modernization with equity and democracy.