

The Role of Educational Quality, Equality and Equity in Low-Income Countries: Findings from the International Academy of Education

Abstract

This session examines the problem of poverty in low-income countries from historical, economic, and sociological perspectives, drawing on studies conducted by Fellows of the International Academy of Education. Two papers examine the role of poverty in view of contemporary meanings of *globalization* and how schooling contributed to the construction of an educated elite. Two papers consider the complex relationship between higher education expansion and income inequality and the role that income inequality plays in economic growth. The last three papers consider the factors influencing the development of a national policy designed for improving educational quality and the issues inherent in trying to measure equality and equity.

Session Summary

The aim of this session is to examine the relationships of education and poverty from historical, economic, and sociological perspectives, drawing on studies conducted by Fellows of the International Academy of Education. The session includes six papers divided into three sections.

William Schubert takes a broad historical perspective to address the problem of poverty, including moral poverty, in view of contemporary meanings of *globalization*. He poses salient questions based on examples of progressive education movements that historically resisted colonization or oppression by dominant state forces in different parts of the world. He considers globalization as a contemporary form of colonization. Marc Depaepe's work is consistent with Schubert's analysis; he describes how education in the Congolese regime of Belgium colonization produced a small elite class that was alienated from its own roots.

Martin Carnoy asks whether the expansion of higher education has equalized the income distribution in the knowledge economies of the BRIC countries. His findings suggest that it actually increased income inequality in China and had a negligible impact in Brazil, Russia, and India. Eric Hanushek and Ludgar Woesman introduce a new approach to consider the relationship between educational achievement and economic growth in Latin America. They slice regional achievement tests into worldwide tests to provide an indicator of human capital. Their results indicate that between one-half and two-thirds of the income differences between Latin America and the rest of the world are associated with human capital.

Maria de Ibarrola examines the factors that influenced the development of a national policy on tutorship in Mexican secondary schools. She analysed qualitative data on the implementation of the policy from sociopolitical, curricular, and institutional perspectives. Crain Soudien makes the argument that the achievement of quality in South African schools is compromised by current approaches to the monitoring and evaluation of learner performance, especially for rural and African children. Doug Willms concludes the session with a discussion of the methodological issues inherent in trying to assess educational quality, equality and equity. He stresses the importance of distinguishing between equality and equity, and the role that the segregation of poor children into poor schools plays in affecting quality and equality.

Collectively these papers make a case for examining the historical context of the relationships between poverty and education in each country, and how these relationships have become entrenched in current policy and practice. The findings are relevant to considerations of the relative merits of supply and demand side interventions aimed at addressing the problems of poverty. While there are compelling findings supporting the relationship between human capital and economic growth, the findings also suggest that increased educational funding or top-down accountability strategies do not necessarily reduce inequalities. Indeed, in some cases they may serve to maintain them.

Duration: We would prefer a 120-minute session, but will accept a 90-minute session.

Willing to participate in the AERA Online Paper Repository?

The Role of Educational Quality, Equality and Equity in Low-Income Countries: Findings from the International Academy of Education		Willing to participate in the AERA Online Paper Repository?
William H. Schubert schubert@uic.edu	Globalization as a contemporary form of colonization	No
Marc Depaepe marc.depaepe@kuleuven-kortrijk.be	Creating cultural hybridity and social inequality through the schooling of a Congolese elite	No
Martin Carnoy carnoy@stanford.edu	Does expanding higher education equalize income distribution in the knowledge economy? The case of the BRIC countries	No
Eric A. Hanushek and Ludgar Woesman hanushek@stanford.edu woessmann@ifo.de	Schooling, educational achievement, and the Latin American growth puzzle	No
María de Ibarrola mdei@prodigy.net.mx	Tutorship as a national proposal for improving quality in Mexican high schools.	No
Crain Soudien Crain.Soudien@uct.ac.za	Is Standardised Testing Exacerbating the Poverty of Schooling? Working towards New Possibilities in Education	No
J. Douglas Willms ksi@nbnet.nb.ca	Ten issues in assessing educational equality and equity.	No
Soledad Bos soledadb@iadb.org	CHAIR	

Historical Movements That Have Opposed Colonization in Different Cultures and Contemporary Similar Opposition to Globalization

William H. Schubert

University of Illinois at Chicago

The purpose of this paper is to address the problem of poverty (including moral poverty) in view of contemporary meanings of *globalization*. One end of the continuum of interpretations of globalization is that it expands advanced culture to the several corners of the world, and at the other end of the continuum critiques the homogeneity of cultural domination by corporate entities that represent interlocking directorates of power among business, military, national governmental, and sometimes religious entities. This will be done by posing salient questions based on examples of progressive education movements that historically resisted colonization or oppression by dominant state forces in different parts of the world. The methods of inquiry are philosophical and historical. Progressive education will be defined as a hybrid of theoretical perspectives of John Dewey (1916, 1938) and Paulo Freire (1970, 1998) and as elaborated in *Love, Justice, and Education: John Dewey and the Utopians* (Schubert, 2009). Historical practices explored will include Freire's work in Brazil and elsewhere, work by Tsunesaburo Makiguchi and his disciple Daisaku Ikeda (Tu Weiming & Ikeda, 2011) in Japan, Ki Hadjar in Indonesia, and John Dewey, Harold Rugg, George Counts, Caroline Pratt, and proponents of the Eight Year Study in the U.S.

These progressive acts of resistance or revolution will be examined as precedent for responses to globalization as a contemporary form of colonization. More briefly, other historical and contemporary settings will be noted (e.g., , Leo Tolstoy in Russia, Rabindranath Tagore in India, Jiddu Krishnamurti in India, Jose Marti in Cuba, Jean-Ovide DeCroly in Belgium, Edouard Claparade in Switzerland, Jane Addams on education through settlement houses in the United States, Maria Montessori in Italy and her world-wide Montessori Schools, Rudolf Steiner of Austria and Waldorf Schools, Carter G. Woodson and W.E.B DuBois on education of African-American communities in the United States, John Holt and John Gatto in the unschooling movement, Fred Rogers in the mass media of U.S. and world-wide television, Ming Fang He on the Cultural Revolution in China, Madhu Suri Prakash and Gustavo Esteva on grassroots postmodernism rural communities of India and Mexico Linda Tuhiwai Smith on decolonizing research through Maori lenses from New Zealand, Bernardo Gallegos on Coyotes or indigenous mixed bloods and Genioras or Native American slaves, and Sandy Grande on Red pedagogy of Native Americans, among others) relative to their potential precedent for responding to globalization. Moreover, the educational acts of resistance by founders of major religions (e.g., Taoism, Buddhism, Confucianism, Christianity, Judaism, and Islam) will be noted as possible exemplars of resistance in early stages of their development. The purpose of this presentation is to share what I have explored relative to movements that oppose domination through education and their tendency to emphasis tenets of progressive education. Results will be offered in the framing of questions that this research raises for interpreting varied perspectives on globalization and their consequences for poverty in the world today.

Creating Cultural Hybridity and Social Inequality Through the Schooling of a Congolese Elite?

Marc Depaepe

University of Leuven

One of the criticisms by the new Congolese regime of the Belgian colonization concerned the lack of executives. The education and training provided by colonial regime had produced a small elite class, which was alienated from its own roots. The authenticity campaign launched in 1971 – from which came the name Zaïre – had to change this situation. Henceforth, the training of the upper social layer had to be cast not in a European but an African mold. This undertaking had many paradoxical sides, not in the least because there was no tradition in Congo of authentic African education. Moreover, in part because of the colonization, the educational aspirations of the autochthon population were generally “western”: by means of advanced studies, the aim was not only to obtain a good job in the society but also to participate in national and international fora.

In our paper we want to analyze via primary sources as well as the existing historiographic literature in how far schooling has contributed to the construction of such an elite. In contrast with other colonial powers Belgium was, at first glance, not willing at all to produce an intellectual executive class. According to our studies more than 95% of total school population was covered by primary schools and a university training – for a very few Congolese people – only existed since 1954, i.e. six years before Independence.

By means of a historical analysis we will show how difficult it was to realize the wish of the progressive powers “to organize a class of evolved natives who declare themselves in agreement with the ideals and principles of our western civilization and who resemble us in rights and duties... less numerous than the native masses but powerful and influential” and how the growing dissatisfaction about the second rank citizenship by the local people was countered by a colonial mimicry”; anchored in a hard to change mentality of superiority. The local sympathy for progressive ideas (of Belgian socialists e.g.) was seen by some missionaries as the proof of the incapacity of the natives to make rational and logic reasoning. In 1959, it was still pontificated by a leading person in the Belgian administration that the African is not mature enough to be Cartesian, and it is not sufficient to import into Africa patterns of thought “.

Nevertheless after WW II the idea of an “évolué” - on the basis of four main criteria: level of education, income, responsibility in society and morality – was translated in the administration of the colony by two juridical interventions: (1) the attribution of “cartes de mérite civique” (1948) (on the basis of colonial services, civilized behavior, western household, resistance against witchcraft and polygamy etc; (2) the system of “immatriculation” (1952), - a kind of legitimizing the social differences within the colony by creating a lower middle class of autochthonous citizens. According to then estimations the number of these *évolués* did not exceed 40,000 (which was around 5% of the active population of Congolese “workers”)

Does Expanding Higher Education Equalize Income Distribution in the Knowledge Economy? The Case of the BRIC Countries

Martin Carnoy

Stanford University

Much of the rhetoric on expanding education enrollment, particularly to higher education, claims that increased access to education equalizes opportunity and income distribution. This paper examines the complex relationship between higher education expansion and income inequality in developing countries. To illustrate our arguments, we discuss the expansion and public financing of higher education in the BRIC countries—Brazil, Russia, India, and China. Forty percent of the world’s population lives in these four countries, and their higher education enrollment has increased rapidly since 1995. Specifically, we employ the standard human capital model and use empirical data gathered on income distribution, education in the labor force, spending on education and rates of return to education during the past 20 years from each country to illustrate how both the variation in years of education as well as the levels and variation in the rates of return to education within each country influence the relationship between education expansion and income inequality. We also estimate the fraction of public subsidies going to various income groups in each country using unique, detailed data for the two “extreme” cases, Brazil and Russia.

We find that mass higher education expansion did not, in and of itself, appear to have decreased income inequality in the BRIC countries. In fact, our analysis suggests that higher education expansion contributed to greater income inequality in China. In the other BRICs, the effect of higher education expansion on income inequality was likely small or negligible. In none of the four countries can we conclude that the current enormous growth in the number of higher education graduates had a major positive influence on equalizing income inequality.

Our findings also indicate that students from families at different levels of the income distribution in the BRIC countries have received vastly different benefits from the public financing of higher education. This is true for both Russia and Brazil, although because of the almost universal access to higher education in Russia, a higher fraction of total public spending in Russia than in Brazil goes to students from low-income families.

The significance of this research is that it clarifies the market mechanisms that impede educational expansion from equalizing incomes in already stratified societies. It also clarifies the role that the State plays in maintaining inequality through its higher educational funding policies.

Schooling, Educational Achievement, and the Latin American Growth Puzzle

Eric A. Hanushek

Stanford University

Ludger Woessmann

IFO Institute for Economic Research

Latin American economic development has been perceived as a puzzle. The region has trailed most other world regions over the past half century despite relatively high initial development and school attainment levels. This puzzle, however, can be resolved by considering educational achievement, a direct measure of human capital. We introduce a new, more inclusive achievement measure that comes from splicing regional achievement tests into worldwide tests. In growth regressions, the positive growth effect of educational achievement fully accounts for the poor growth performance of Latin American countries. These results are confirmed in a number of instrumental-variable specifications that exploit plausibly exogenous achievement variation stemming from historical and institutional determinants of educational achievement. Finally, a development accounting analysis finds that, once educational achievement is included, human capital can account for between half and two thirds of the income differences between Latin America and the rest of the world.

The Implementation of a National Proposal for Improving Quality: Beyond Quality Assessment Evidence

María de Ibarrola

National Polytechnical Institute

Large scale assessments have become valid evidence for defining the quality of education within and among countries, and results are used to explain both the differences in personal income distribution as well as the economic development of countries. As such, governments foster various types of educational quality policies. The purpose of this paper is to analyze and describe the factors influencing the development of one national policy designed for improving quality - from its definition and design to the way individual schools are implementing it. The policy pertains to the implementation of *tutorship* within Mexican High School studying plans.

Three theoretical perspectives are at the basis of this analysis. The first encompasses the sociopolitical perspective concerning the way a nation-wide educational decision is made. How does a problem, such as poor quality of student performance on an international standardized test, become part of the government agenda? How is this problem defined, and what solutions are provided through laws, norms, policies, programs, budgets, and new institutions. The approach also allows for the analysis of various figureheads who develop the policy at different levels - from federal government personnel to classroom teachers; how do they resist it, change it, interpret it, and eventually appropriate it and make it work, or not.

The second is a curricular perspective formulated using research on curriculum since 1970. This perspective proposes that curriculum decisions have to be sustained by the provisions of different “institutional curricular structures.” These include defining specific objectives, aims and purposes, the profile and requirements of teachers who will be hired to enforce the curriculum, time and space assigned within the comprehensive studying plans, available material and didactic resources, and ways for evaluating and certificating results. The way these elements are decided upon and how they interact with each other allow for different configurations of educational policy implementation.

The third is an institutional approach that allows for the analysis of how proposed policies are gradually incorporated - or not - into the daily teaching conditions that schools have built through their particular history, institutional organization and mode of operation.

The methodology is a personal approach to the comprehensive data and is based on the implementation of *tutorship* in 12 Mexican High Schools of different characteristics: modality, size and geographical localization. This study is derived from a qualitative research project that I coordinated and conducted with other departmental colleagues and consists of the following: a five day visit to each school, interviews with directors and deputy directors (53), tutors and teachers (76), students (129), parents (37), and observation of *tutorship* classes (50). The significance of the study is in results describing the different levels and dimensions of fragmentation – not continuity – in various levels of decision-making and the complexity surrounding each. Performance on large scale international standardized test is only one side of quality evidence.

Is Standardised Testing Exacerbating the Poverty of Schooling? Working towards New Possibilities in Education

Crain Soudien

University of Cape Town

This paper makes the argument that the achievement of quality in education is compromised by current approaches to the monitoring and evaluation of learner performance. It draws on recent performance data from benchmarking tests in South African schools, South African learner performance in standardised international tests (TIMMS, PIRLS and SAQMEQ), to pose questions about the capacity and value of testing as a means of engaging with the challenges and weaknesses of the South African education system and particular the capacity of the schooling system to help learners engage with poverty.

The data on which the paper draws shows that the burden of failure falls primarily on rural and African children. It shows how this failure leads to learners dropping-out of the system and the impact of this performance on the labour market where again the burdens of unemployment fall most heavily on these youth. In looking at how the cycle of poor schooling and poverty can be disrupted, the paper looks at current thinking in school improvement and the turn towards standardised testing in South Africa. The paper looks critically at the strengths and weaknesses of this development through an analysis of the major national interventions and the accountability mechanisms to monitor these interventions.

In focusing on these responses the paper shows how bench-marking testing has come to be used as the primary means for monitoring and evaluating the impact of the state's interventions and for holding schools and teachers to account. Through a critical examination of this relationship between testing and the objectives of achieving school improvement, the paper shows how the use of a limited set of standardised measures for evaluating the teaching and learning process has come to pose challenges to education and the capacity of schools to respond in innovative ways to the situation in which they find themselves. It argues that to plan for educational improvement on the basis of the kind of standardisation which is common is problematic and is likely, firstly, to define the purposes of education in ways that may be antithetical to broader societal purposes of education, and, secondly, to drive the system in directions that may exacerbate the problems identified in the first instance. The paper proceeds with an acknowledgement of the place of learner performance evaluation in school improvement but suggests that alternative and complementary measures need to be put in place to assist schools in how they engage with the challenge of raising levels of attainment and, critically, the quality of education they offer. The paper concludes with outlines of alternatives ways in which schools can develop their capacity to both monitor and evaluate what they do and build their capacity to educate.

Ten Issues in Assessing Educational Equality and Equity:

Brazil as a Case Study

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Lucia Tramonte

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Jesús Duarte

Soledad Bos

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Virtually all economically developed countries recognize that social and economic development require universal provision of education from early childhood to adolescence and most countries have established constitutional and legal guarantees for universal provision (Levin, 2009). The 1989 UN Convention on the Rights of the Child included the rights of children to a standard of living adequate for their physical, mental, spiritual, moral and social development; the highest attainable standards of health care; and a quality education, with a view to achieving this right progressively and on the basis of equal opportunity. However, there is considerable evidence from large-scale international studies that even in some of the world's wealthiest countries children from high socioeconomic backgrounds have greater access to economic, social, and educational resources than their peers from low socioeconomic families (Tramonte & Willms, 2010). Moreover, the relationship between education achievement and socioeconomic status varies among communities within countries (Willms, 2001) and among countries (Willms, 2006, 2010). Thus, it seems that some jurisdictions are better able to reduce disparities among socioeconomic groups as well as among ethnic groups, between immigrants and non-immigrants and between the sexes.

Consequently, educational leaders have become increasingly interested in quantifying and monitoring differences in educational outcomes among sub-populations, and determining the factors associated with them. However, researchers have defined and assessed educational equality and equity in various ways, making it difficult to monitor progress or make comparisons among countries or other jurisdictions. Also, the measurement of equality and inequity is not as straightforward as it may seem; there are a number of methodological issues concerning the validity and reliability of indicators of equality and equity which affect their utility for informing educational policy and practice.

This paper describes how data from national monitoring systems and large-scale assessments can be analysed to inform school policy and practice. It distinguishes between measures of *equality* and *equity*, and discusses the prominent issues regarding the use of large-scale national and international assessment data to assess them. It provides a relatively simple structure that can be used by educational administrators for the assessment of equality and equity, and sets out a multi-level statistical model for the estimation of the relevant statistics. Data from Brazil, which has one of the best educational monitoring systems in Latin America, are used as an example.