Social Democracy in Latin America: Policymakers and education reform in Brazil and Chile

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Background

- PhD project and dissertation, 2005-09

- Drew on MSc dissertation (2004-05)

- Two dimensions relevant for discussion:

    1. Parameters of education policy

    2. Experience of governments in education policy

Parameters of education policy

- Drawn from scholarly literature and empirical evidence

- Individual chapters address each education policy theme

- Different perspectives (LSE v IoE)

Education themes

1. Government/Political elites (study later)
2. Role of State
3. Curriculum
4. Expenditure
5. Assessment and Evaluation
6. Participation (theories/approaches)
7. Relations with private sector, teachers and students

Role of the State

- Institutional arrangements (centralisation/decentralisation)

- Role of globalisation (levelling effect?)

- History (public provision v market role)

- Washington Consensus (first v second generation)

Curriculum

- Ideology (left equality v right 'difference')

- Capital development?

- Social values/mores?

- Vocational/technical v academic/general

- Educational stages (primary, secondary)

- Disciplines (history v maths)

- Globalisation ('flexibility', general knowledge)

- Role of state v other education providers

Expenditure

- More/Less? (1960s v 1980s v 2000s)

- Public v private

- State centralisation/decentralisation

- Relative costs of primary, secondary, tertiary

- Wider budgetary constraints/opportunities

Assessment and Evaluation

- Quantity v quality

- Challenged concept

- Uncertainty regarding delivery

- Trade-offs of inclusion/exclusion (e.g. more students, more stakeholders/consultation)

- Ideological drivers (e.g. neo-conservative v neo-liberal)

- Stakeholder expectations (managers' efficiency v teachers' professionalism)

- Level of evaluation (Student? School? System?)

- International dimension (PISA, TIMMS)

Participation (theories/approaches)

- 'Good thing'

- Who to include?

- Ambiguity (representative, deliberative, rational choice/market)

- Open or closed?

- Normative tones of terms used ('community', 'corporate')

Relations with private sector, teachers and students

- Private sector
  - Size and funds
  - Challenge to state and democracy
  - Organisational capacity
  - Variation (for-profit, religious, 'community'-based)

- Teachers
  - Labour (traditional trade union) or professionals?
  - For or against status quo?
  - Knights or knaves? (Le Grand 2003)
  - Organisational strength/weakness

- Students
  - Pawns or queens? (Le Grand 2003)
  - Interests (narrow materialism v broader democratic substance)
  - Influence (historic strength/homogeneity v contemporary weakness/heterogeneity)

  (Central to discussion – ideological perspectives, inc. social democratic, Marxist, neo-liberal, neo-conservative)

Experience of governments in education policy

- Three 'social democratic' case studies:
  - Concertacion, Chile (1990-2007)
  - Cardoso, Brazil (1995-2002)
  - Lula, Brazil (2003-07)

- Comparative historical approach (inc details of education policy prior to case studies)

- 39 interviews (ex-president, 3 ministers, ministerial advisors, bureaucrats, interest groups) and archival research in Brazil, Chile and US

- **Assumptions:**
  - Two types of social democracy (Third Way and Participatory Left)
  - Technocratic/Elitist Third Way (Concertacion, Cardoso)
  - Socially-oriented Participatory Left (Lula)
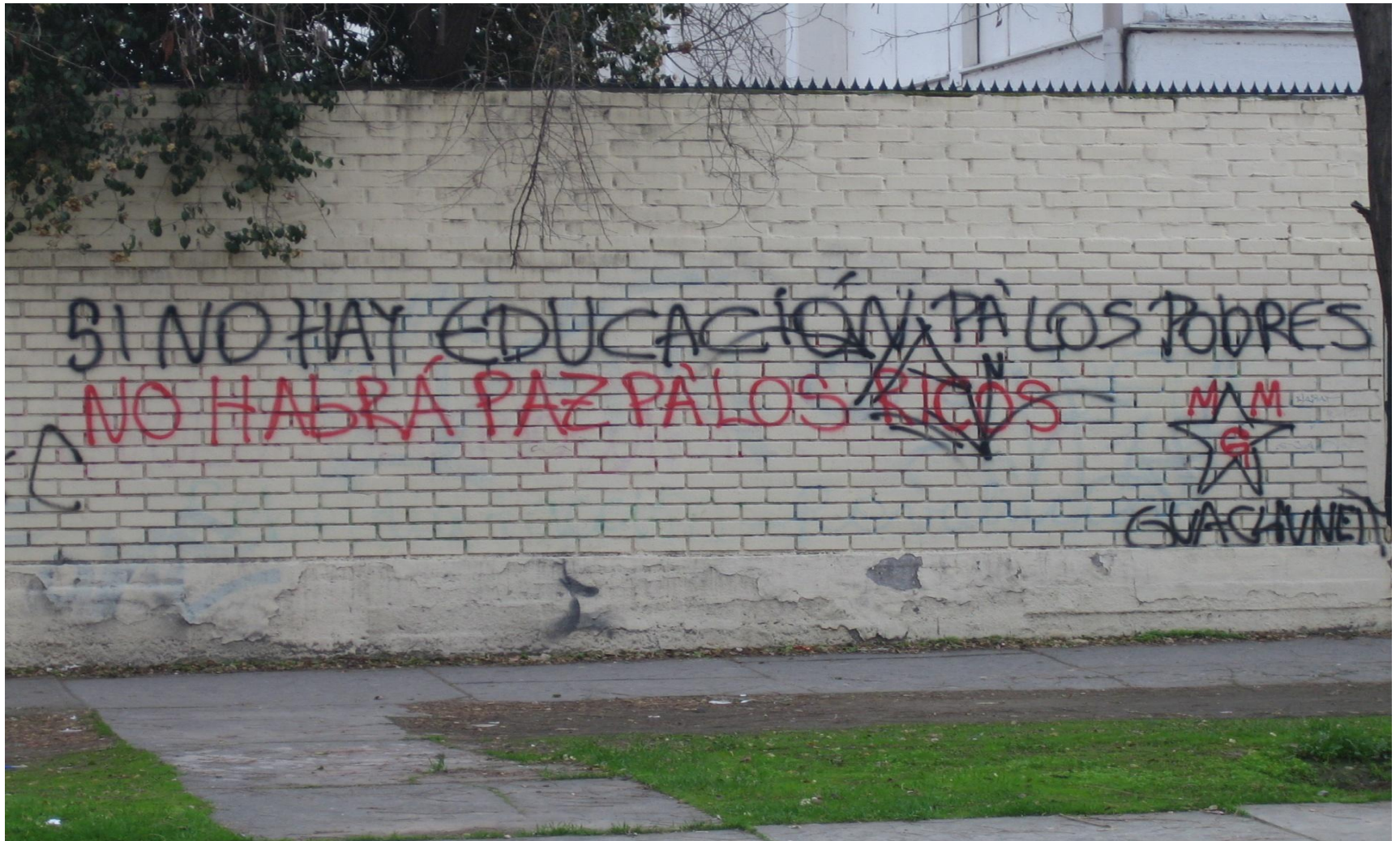
- **Findings:**
  - Broadly similar education policies
  - Differences in cooperative/confrontational relations between governments and actors

- **Explanation for findings:**

  1. Role of leadership/policymaking elites within governments
  - Social roots and connections of Concertacion, pre-1995; disconnection post-1995
  - Absent social roots of Cardoso government
  - Leadership v social base of PT (and Lula government)

  2. Educational structure and power asymmetry
  - State (education ministry, public funds, private sector provision)
  - Non-state (political parties, teacher and student movements)

Social democratic governments and education policy in Latin America

	Concertación (Third Way)	Cardoso (PSDB) government (Third Way)	Lula (PT) government (Participatory Left)
Part One: Government emergence and nature			
Origins	Political party-social movement opposition to military regime, pre-1990 Political parties dominate social movements, post-1990	Political party opposition to military regime, pre-1985 Parliamentary opposition (1985-92), government member (1992-94)	Political party-social movement opposition to military regime, pre-1985 Parliamentary opposition (1985-2002)
Education policymaking core	Opposition: political party-social movement links Government: concentrated in ministry	Opposition: concentrated in political party Government: concentrated in ministry	Opposition: political party-social movement links (pre-2000s) Government: concentrated in ministry (post-2003)
Part Two: Impact on education			
Role of state	Limited, supervisory (1990s) Expansive (2000s)	Limited, coordinative	Expansive
Purpose of education (curriculum)	Economic competitiveness; curricular reform; primary and secondary education (formal)	Economic competitiveness; curricular reform; primary education (formal)	Uncertain, changing goals (formal and informal); subsequently primary and secondary education (formal)
Public expenditure on education	More public spending, targeted programmes	Redistributed public spending (FUNDEF), targeted programmes	More public spending, redistributed spending, targeted programmes
Assessment/Evaluation	Method: universal (SIMCE), external (international testing)	Method: samples (SAEB), external (Provão), international testing	Method: universal (Prova Brasil), participative (Sindaes)
Attitude to participation	Representative (1990-2006) Deliberative (2006) Representative (post-2006)	Representative	Deliberative (pre-2000s) Representative (post-2003)
Relations with private sector	Consensual	Consensual	Consensual
Relations with teachers	Consensual (1990-95) Conflict (post-1995)	Conflict	Consensual
Relations with students	Consensual (1990-95) Conflict (post-1995)	Conflict	Consensual

'Si no hay education pa los pobres, no habra paz pa los ricos'
(If there's no education for the poor, there won't be peace for the rich)
Graffiti on a wall near the Colegio de Profesores, Santiago (national teachers' union in Chile)