Global Educational Expansion

Historical Legacies and Political Obstacles

Aaron Benavot, Julia Resnik, and Javier Corrales

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Preface

The reasons for providing all the world's children with high-quality primary and secondary education are numerous and compelling. Education provides economic benefits and improves health. Education is a widely accepted humanitarian obligation and an internationally mandated human right. These claims are neither controversial nor new. In 1990, the international community resoundingly pledged to achieve universal basic education by 2000, and later extended its deadline to 2015. The unanimity of commitment and shortfall in achievement raise a fundamental question. If universal education is such a good idea, why don't we have it already?

As part of the American Academy's Universal Basic and Secondary Education (UBASE) Project, we asked this question of Aaron Benavot, Julia Resnik, and Javier Corrales. Benavot and Resnik considered the history and legacy of efforts to achieve universal basic and secondary education. Corrales examined the present political obstacles to and incentives for expanding and improving education where it is most scarce. Their findings, published here, provide a healthy dose of realism to estimates of the scale of the UBASE challenge. But by illuminating the challenges, they also render them finite.

In explaining the elusiveness of universal primary and secondary education, Benavot and Resnik call attention to the enormous progress to date and the complexity of the work remaining. They examine the emergence of compulsory education laws, the transformation of diverse educational frameworks into formal school systems, the problems of inequality that have arisen, and the role played by international organizations in creating an increasingly interconnected global education system.

On the basis of this geographically broad comparative history, the authors offer an essential observation and an important suggestion. The observation is that despite the apparent uniformity in contemporary schooling, past educational models took many forms, and motivations for educational expansion varied widely. The suggestion is that international organizations seeking to facilitate educational expansion need to be attuned to this varied history if their interventions are to succeed. Benavot and Resnik recount, for example, that when leaders advocated the decentralization of education in Latin American countries in the 1980s, they ignored the specific social and political purposes for which those schools had been founded, which included ending severe socioeconomic segregation. Decentralization led to a growth of private schools and renewed fragmentation along class lines, which exacerbated the social divide that school centralization was initially intended to correct. The implication is clear: global education advocates, donors, and policy makers who ignore history do so at considerable peril.

Where Benavot and Resnik emphasize the historical legacies with which policy makers must contend, Corrales highlights the weak, conflicting, and at times perverse political incentives facing those interested in expanding and improving education. Corrales finds that, overall, international sources of leverage are weak. Even as globalization proceeds, the demand for highly skilled labor is mixed—some industries require an educated labor pool while others seek labor that is cheap and relatively unskilled. Multilateral lending institutions have emphasized education more in recent years. Corrales cites evidence, however, that funds earmarked for education are sometimes diverted for other purposes. Within countries, state authorities rarely face strong political pressures to expand or improve their educational systems. Societal demand for education is frequently weakest in poor regions or countries where it is most needed. Corrales argues that past state motivations to provide education—to consolidate national identity, win citizen loyalty, or neutralize rival political groups—were most prominent when nationalist, revolutionary, and totalitarian ideologies drove political development. Today, these rationales are less relevant.

Corrales discusses policies that might reinforce the positive incentives for expanding education. These policies, he suggests, should be aimed at boosting the demand for education by reducing the cost of schooling to individual families; building up the capacity of state agencies to deliver education of high quality; generating additional performance indicators to improve the efficiency of educational delivery; containing opposition to educational expansion by compensating those most directly threatened; and strengthening mechanisms for ensuring accountability of those at all levels of the education system. These are informed and ambitious proposals, and should stimulate necessary discussion.

Drafts of each paper were reviewed and discussed by experts at daylong workshops held at the American Academy in Cambridge, Massachusetts. A workshop on "The Intellectual and Programmatic History of Universal Basic and Secondary Education," was held on September 6–7, 2003 and was attended by Leslie Berlowitz, David E. Bloom, Cecilia Braslavsky, Colette Chabbott, Michael Clemens, Joel E. Cohen, Javier Corrales, John Craig, William K. Cummings, Andy Green, Silvina Gvirtz, George Ingram, Julie Kennedy, Angela Little, Charles Magnin, Kishore Mahbubani, Martin Malin, Kenneth Prewitt, and Francisco Ramirez. We join the authors in thanking the participants for their extremely valuable comments. Benavot and Resnik also thank Juan Manuel Moreno, António Nóvoa, Yasemin Soysal, and Jón Torfi Jónasson who made helpful comments. Two anonymous reviewers provided constructive written comments. Benavot acknowledges the generous support of the International Bureau of Education during the paper's completion.

A workshop on "The Political Obstacles to Universal Basic and Secondary Education" was held on February 27, 2003. Participating were: David E. Bloom, Barbara Bruns, Claudio de Moura Castro, Joel E. Cohen, Merilee Grindle, George Ingram, Robert LeVine, Kishore Mahbubani, Martin Malin, Lant Pritchett, Jeffrey Puryear, Gene Sperling, and Camer Vellani. We thank the workshop participants, Ernesto Schiefelbein, and two anonymous

reviewers for their generous comments. Corrales is also grateful to Ashley Bates and Jonathan Borowsky, who provided research assistance at different stages of the project, and to Joan M. Nelson. A special thanks is due to Helen Curry at the American Academy, whose copy-editing and project coordination have been indispensable. Leslie Berlowitz's vision and leadership as chief executive officer of the American Academy made this project possible.

The UBASE project focuses on the rationale, the means, and the consequences of providing the equivalent of a primary and secondary education of quality to all the world's children. Access to primary school has increased sharply in recent decades in most of the developing world, to levels that, in some regions, approach those in developed countries. But secondary school attendance, which has also risen rapidly, is still substantially lower in developing countries than in the developed countries. The quality of the education offered at the primary and secondary levels leaves much to be desired, as judged by examination of a wide range of inputs, outputs, and practices of educational systems in most developing countries.

This monograph is one in a series of the UBASE project published by the American Academy. Other papers examine related topics, including:

- basic facts about education, and the nature and quality of the data that underpin these facts;
- the goals of primary and secondary education in different settings, and how progress toward those goals is assessed;
- means of implementing universal education, and the evaluation of these means;
- consequences of achieving universal primary and secondary schooling;
- health and education;
- the costs of achieving universal education at the primary and secondary levels.

The complexity of achieving universal basic and secondary education extends beyond the bounds of any single discipline and necessitates disciplinary rigor as well as interdisciplinary, international, and cross-professional collaboration. By focusing on both primary and secondary education, paying attention to access, quality, and cultural diversity, and encouraging fresh perspectives, we hope that the UBASE project will accelerate and enrich educational development.

This project is supported by a generous grant from the William and Flora Hewlett Foundation, and by grants from John Reed, the Golden Family Foundation, Paul Zuckerman, an anonymous donor, and the American Academy of Arts and Sciences. The project also benefits from the advice of a distinguished advisory committee, whose names are listed at the back of this volume.

As with all Occasional Papers of the American Academy, responsibility for the views presented here rests with the authors.

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Lessons from the Past: A Comparative Socio-Historical Analysis of Primary and Secondary Education

AARON BENAVOT AND JULIA RESNIK

INTRODUCTION

The foremost policy aim of educational elites and international organizations dedicated to education is to enable every young child in the world to exercise his or her right to a quality education by means of national frameworks of universal schooling. The notion of education as a basic human right, initially laid out in Article 26 of the 1948 Universal Declaration of Human Rights, has been reiterated in numerous international covenants and conventions (UNESCO, 2000). Because children cannot secure access to a quality education for themselves, state officials, regional authorities, and local communities are morally obligated to establish the means by which universal access to education becomes a reality. Moreover, the idea of education as a fundamental human right is increasingly supplemented by a view that underscores the intrinsic value of education as an experience that enhances each and every individual's capabilities and freedoms (Sen, 1999). Thus, educational expansion can be understood as a form of development in and of itself, which moves beyond conventional ideas about the impact of education on economic and national development. Undoubtedly, the worldwide circulation of these moral, legal, and social imperatives concerning education has helped to justify the tremendous allocation of resources, by national governments and international agencies alike, to provide education for all (UNESCO, 2002; 2003/4).

This paper explores the historical bases of the idea of universal education and of efforts to realize this goal, as well as the conditions that facilitated (or hindered) these in different times and places. It seeks to move beyond existing avenues of scholarly inquiry and sketches out an alternative strategy for a comparative historical study of universal education. By identifying key analytical components of the contemporary conception of mass schooling and examining their historical emergence, this paper focuses on the diverse

antecedents of existing models of universal education and revisits the unique pathways and divergent outcomes of past models. We liken our strategy to standing over a rich and flavorful "educational" broth, in which the initially distinct and numerous ingredients have settled to the bottom of the pot. We wish to stir up and reexamine the savory (and often forgotten) ingredients lying at the base of the soup cauldron, which are perceived as having fused together into a standard framework of universal education. By doing so, we hope to raise new questions and ideas, which are relevant to current policy debates on universal education.

Viewed from a world-historical perspective, the long-term trend towards universal education can be characterized as follows: Under varying economic, cultural, and political conditions, public mass schooling expanded and underwent initial consolidation in the West during the late eighteenth and early nineteenth centuries. The idea that young people needed to undergo special forms of socialization and training in public schools, rather than at home or through religious institutions, gained favor. The public increasingly viewed school-based experiences as important because the parameters of adult life were not fixed at birth and because social progress depended on the actions, choices, and inclinations of a society's members. The rhetoric and realities of mass public education were later selectively adapted in non-European and colonial education systems during the nineteenth and twentieth centuries. Over time, education in general, and compulsory mass schooling in particular, underwent significant institutionalization owing to the decisions of independent nation-states and the declarations of international associations and organizations. Transnational networks and international organizations played a particularly influential role in the development of mass schooling in Asia, Africa, and Latin America, especially after World War II, insofar as they impelled modernizing elites to facilitate the circulation, emulation, and adoption of Western educational models and the adaptation of these models to local contexts. Overall, the expansion of national education systems, the diffusion of comparative accounts of schooling, and the diverse activities of international organizations laid the groundwork for the emergence of a relatively uniform model of mass, state-sponsored schooling. They also contributed to the convergence of basic educational realities in much of the world today.[1]

The present paper deconstructs existing conceptions of the development of a uniform, undifferentiated model of mass schooling (Boli et al., 1985; Ramirez and Boli, 1987; Meyer et al., 1992) by examining key historical processes and institutions that contributed to the drive for universal educa-

1. Mass schooling can be examined on at least two levels. First, it can be understood as an evolving reality of schools, teachers, pupils, curriculum, educational laws, statutes, and so forth. Second, it can be seen as a social construct or model that conceives, accounts for, theorizes and, more often than not, celebrates this reality, especially its contribution to desirable societal outcomes (e.g., economic development, nation building, social equality, political revitalization) and individual-level transformations (e.g., literacy acquisition, skill enhancement, rational behavior, value changes). Although developments at each level are intertwined and mutually reinforcing, we believe that it is analytically advantageous to keep them separate.

tion. We sketch a historical geography of the diverse, often context-specific, meanings and institutional forms of education, and explore the different historical trajectories along which these elements developed. Although some elements eventually fused into a relatively standard model of universal, free, compulsory mass schooling, others remained inextricably bound to particular times and places and, in a sense, have been lost to all but a few specialists in educational history.

The analytical strategy employed in this paper, though "unconventional," complements recent scholarship in the field of comparative education. For example, in his historical survey of primary education in Africa, Kenneth King (1990: 216) discusses the importance of "untangling the threads that led to the formation of state systems." Recent work by William Cummings (2003) also emphasizes the need to examine variations that eventually coalesced into more standardized forms in modern education systems. Notions of "culture-specific diversification" and "domestic reflections on education," as discussed by Juergen Schriewer and his colleague (Schriewer and Martinez, 2003), are certainly relevant to the historical approach employed below.

On its own, a comparative analysis of key historical processes and institutional forms has considerable academic merit. Moreover, we reason that this strategy represents a potentially informative contribution to ongoing policy debates concerning universal basic and secondary education (UBASE). If, as we shall argue, much of the institutional diversity in educational history has either been ignored or forgotten in contemporary discourse, then revisiting past meanings and forms of education should, at least in theory, broaden the conceptual basis upon which alternative policies and intervention strategies are evaluated. Having said this, the present paper does not presume to provide a comprehensive comparative history of mass schooling (a daunting, if not impossible task). At this juncture, we simply highlight several key analytical elements in the history of mass schooling, as a point of departure for further work.

The key analytical topics discussed in this paper are compulsory schooling and its prolongation, the transformation of diverse educational frameworks into formal school systems, inequality and equity issues, and the institutionalization of the global education system.

Legal-Institutional Conditions

A major issue in achieving universal education is the degree to which the state (or a legally constituted political authority) is committed to providing educational services for all children in particular age groups. The establishment of legal provisions for free and compulsory education—thus universal and inclusive in intended scope—is considered a necessary, though insufficient, condition for the guarantee of formal education to all school-age children.

We survey select issues relating to the establishment, substance, and prolongation of compulsory education laws and statutes. Histories of compulsory mass schooling typically focus on the date at which different countries (or polities) passed a law, constitutional provision, or legal statute requiring parents to enroll their school-age children. Many such studies describe the social,

economic, and/or political forces that affected the passage of compulsory school laws. We argue, however, that the scholarly literature has had less to say about the nature of compulsory education laws, the exact parameters of such laws and their effects over time.

Our analysis of compulsory schooling laws seeks to convey an important point: In the West and elsewhere, the historical record with respect to the legal-institutional conditions of mass schooling is profoundly diverse. Compulsory, state-sponsored schooling emerged from extremely heterogeneous legal frameworks and initial conditions. It is not that laws were not instrumental factors; rather, they had different intended meanings and consequences in different settings.

Systemization Processes

Universal basic education, as currently conceived, depends on the ability of national governments to organize sequences of relatively uniform classroom activities in authorized schools as part of an integrated national system. Thus, a critical aspect of a comparative history of mass schooling is discussion of the following question: How did different national polities each construct a relatively integrated and standardized national school system out of diverse existing establishments, sponsoring bodies, training frameworks, and educational programs, many of which were independent, isolated, or unrelated?

We discuss historical patterns in the formation, integration, and standardization of state education systems. These analytical issues describe the types of initiatives, problems, dilemmas, and solutions that confronted political authorities in the past, as they set out to create an educational whole out of diverse, semi-related, and often non-existent parts. Not only did this entail the definition of legal provisions for public schooling, but also the empowerment of legitimate central authorities with administrative powers and capacities to oversee the day-to-day operation of an expanding public school system. In many instances this involved integrating competing loyalties via state-church-community alliances or replacing existing bases of loyalty (e.g., local, religious, linguistic) with a unified national identity by confronting or co-opting local elites and church authorities.

Specifically our analyses focus on following three systemization processes: 1) creating an integrated national system of mass education in which clear links are established between elementary, secondary, and higher education; 2) determining the level of centralization or decentralization in the governance and finance of the education system; and 3) determining the extent to which the state recognizes (and incorporates) schools and educational programs established by private organizations or religious associations.

Inequality and Equity Issues

Embedded in the notion of universal education is the assumption that all children, regardless of race, sex, religion, ethnicity, class, or residence, should have equal access to basic schooling and courses of study, at least during the years of compulsory education. Social and cultural inequalities in access and

attainment have been endemic throughout their history of public school systems: from periods of early consolidation to later expansion.

In addition to uneven rates of educational expansion, institutional policies (e.g., selection practices, entrance examinations) and structures (e.g., elite, comprehensive, diversified or vocational/technical secondary schooling) contributed to persistent patterns of unequal access and participation in European and North American schools. In southern hemisphere countries, a heightened concern for equity principles revealed gross social, gender, and spatial inequalities in basic educational services, grade retention, and school dropout rates. The under-representation of girls in primary schools highlighted other gender issues like coeducation. Single-sex schooling and gender-specific educational programs, which were an integral part of the early history of mass schooling, lost legitimacy in favor of mixed-sex schools and classrooms and "gender-neutral" policies. Finally, the circulation of equity principles governing modern education also exposed disparities in school enrollments between majority and minority groups and between urban and rural populations, tendencies that increasingly came to be defined as objectionable.

Our discussion of educational inequality and equity issues focuses on two historical problems in relation to UBASE: 1) comparative and historical variations in access to secondary school programs, and 2) the changing elitist and academic nature of secondary schooling.[2] We survey changing institutional structures governing secondary education, as well as problems accompanying the transformation of highly selective, academically oriented institutions into more comprehensive, diversified, and multi-purpose systems that integrate most young people in age-delineated categories. We also discuss how the experiences of communist countries illustrate ongoing dilemmas between academic and vocational studies and between the commitment to egalitarianism and the encouragement of high achievement in education. The example of Cuba, in particular, throws light on the ways in which comprehensive reforms can facilitate widespread educational progress.

International Organizations and Global Models of Mass Schooling

The adoption, emulation, or transformation of dominant educational models from one context to another is not an especially new phenomenon (Phillips and Ochs, 2004). What has changed is the nature of educational knowledge transfers—in other words, the reasons for the emulation (adaptation) of prominent educational models and the conception of relations between education systems.

2. Due to space considerations, a third critical issue—gender inequalities in the development of mass education—was set aside. Undoubtedly, historical transformations in the rules governing the participation of girls and young women in public school systems are an important aspect of the movement towards universal education. In addition, the ideology of coeducation and adoption of coeducation policies enabling girls and boys to learn together (or separately) in schools and classrooms varied significantly both within and across world regions (see Kandel, 1930: 499–519; Ramirez and Cha, 1990; Tyack and Hansot, 1990). At the secondary level, the education of girls went hand in hand with the establishment of teacher certification and normal schools.

We distinguish three types of educational transfer from the historical record: first, the emulation of a single "successful" educational model (e.g., Prussia, later Japan) based on predominantly qualitative observations; second, systematic comparisons of a plurality of education systems based on rudimentary statistical information and descriptive accounts; and third, the formation of a global educational community (Meyer and Ramirez, 2000; Chabbott, 2003) in which educational standards, principles, and innovations circulate in increasingly dense transnational networks, framing discussions and policy initiatives at the national and sub-national levels. Educational models emerging from these networks contributed to the continuing convergence of education systems (Resnik, 2001).

In short, we discuss how international organizations emerge as central actors in their own right during the contemporary period of knowledge exchange, and contribute to an increasingly interconnected global education system.

A Methodological Note

The spread of modern education, based on notions of universal access and equity principles, has long been an object of scholarly and popular attention. Politicians and publicists have reported their visits to foreign education systems, scholars have written treatises about the nature and significance of mass schooling, historians have described past educational reforms and types of school organization, and governmental agencies have compared school enrollments in different national settings (see Fraser and Brickman, 1968). The attention afforded to mass schooling was also enriched by important institutional developments. For example, the emergence of comparative education as an academic field (Holmes, 1981; Halls, 1990; Cowen, 1990; Schriewer, 2000), the publication of educational yearbooks and compendia (e.g., Columbia University's *Educational Yearbook*, IBE's *International Yearbook of Education*, UNESCO's *World Survey of Education*), the efforts of specialized national educational agencies (e.g., the U.S. Bureau of Education), the exchange of information and ideas during international educational conferences (e.g., IBE's International Conference on Public Education, beginning in the 1930s) or at education-related exhibits in world fairs (see Waterman, 1893), and the amassing and circulation of comparative accounts of schooling by international governmental organizations (e.g., UNESCO, World Bank, OECD) have all contributed to different understandings of the emergence of universal education, not only as a reality but also as an idea or model.

In order to identify and classify key analytical topics and issues for the present comparative historical survey of mass schooling, we cast a wide—albeit far from all-encompassing—net over relevant written documents, books, and essays. The present paper focuses on a select set of these issues, which have been classified into the four aforementioned categories. These categories are not meant to exhaust all relevant (or possible) thematic issues. For example, the present paper does not discuss the changing nature of educational goals and aims, the curricular contents of public schooling, gender

inequality, educational financing, teaching training and licensing, minority and immigrant education, and non-formal education.

The paper is also limited in the range of countries it examines. Many countries in Western Europe and North America are discussed in considerable detail because they represent key cases for understanding the early evolution of universal education. In addition, educational histories of these countries are both numerous and relatively rich. We pay particular attention to the development of mass education in less-developed world regions, mainly Latin America and Africa. On several occasions, we illustrate our arguments by presenting examples or counter-examples from India, Malaysia, Thailand, Cuba and Indonesia.

EXPLORING THE ORIGINS AND EXPANSION OF UNIVERSAL EDUCATION

Historical explorations of the idea of universal education and of educational expansion can be broadly classified into two major paths of inquiry. The first concentrates on the history of educational ideas—in this case, universal education and mass schooling. This analytical strategy, which dominated scholarly discourse for years, surveys the writings of leading educational, religious, and political thinkers who, at different times and places, championed the spread of formal education to young children of different social and cultural backgrounds in increasingly inclusionary terms. Based on the assumption that key educational reforms resulted from the ideas and inspired leadership of particular individuals or groups, this strategy typically focuses on the education-related treatises of prominent scholars such as Bacon, Locke, Montaigne, and Comenius, the intellectual legacies of Rousseau, Pestalozzi, Froebel, Herbert, von Fellenburg, and later, Mann, Dewey, and Montessori, and, owing to the early emergence of education in the Nordic countries (Barnard, 1854: 619), sometimes considers the work of Lutheran preachers such as Grundtvig and Kold.

Undoubtedly, the development of modern education in the West owes much to the scholarly (and popular) writings of such leading educational figures. Nevertheless, once the ideas of modern education and mass schooling took root and gained widespread acceptance, educational realities quickly turned to practicalities, namely, establishing a legal basis for public schooling, organizing a system of interconnected schools and authorized courses of study, prescribing required curricular contents, setting up teacher training frameworks, and defining the contours of educational governance and finance. The actual decisions to establish and expand school systems were, in our opinion, much less influenced by the ideas of leading or "alternative" (e.g., Tolstoy, Freire, or Illich) educational thinkers, and more by broad-based political, economic, and social forces. Furthermore, even if one could demonstrate the historical existence of substantive links between particular thinkers and specific educational reforms or practices, we suspect that these

have become increasingly tenuous over the course of the twentieth century and beyond the geographical confines of Western Europe and North America. Finally, given the objectives of this facet of the UBASE project—to determine the extent to which variations in the history and evolution of mass schooling are relevant to contemporary policy discussions and initiatives—we believe that a comparative mapping of influential educational ideas of the past would lead us down a well-trodden path into an analytical cul-de-sac.

A second path of inquiry involves the research literature on educational expansion and formalization. This substantial body of historical and empirical research spans academic disciplines (e.g., economics, history, sociology, political science), incorporates and often tests alternative theoretical explanations (e.g., functionalism, convergence, reproduction, status competition, population ecology), encompasses different levels of analysis (e.g., individuals, regions, states), and employs a range of research designs (e.g., historical case studies, regional comparisons, and cross-national analyses) (see Meyer et al., 1977; Craig, 1981; Archer, 1979; Heidenheimer, 1981; Boli et al., 1985; Rubinson and Ralph, 1984; Benavot and Riddle, 1988; Fuller and Rubinson, 1992; Meyer et al., 1992; Jónasson, 2003; Clemens, 2004). The vast majority of these studies investigate the antecedents of educational expansion. Many fewer examine mass schooling in terms of legal formalization, administrative (de)centralization, and school-home relations (for exceptions, see Boli-Bennett and Meyer, 1978; Muller et al., 1987; Inkeles and Sirowy, 1983; Ramirez and Ventresca, 1992; Cummings and Riddell, 1994; Green et al., 1999; Astiz et al., 2002).

For the purposes of the present paper, this path of inquiry has several limitations (apart from having already been well surveyed). First, the overwhelming focus on school expansion leads most researchers to consider a narrow set of measures with respect to the development of modern education systems. Comparative studies of mass schooling tend to disproportionately emphasize school enrollment rates[3] and how they changed over time. However instructive analyses of enrollment rates may be, they should not be the sole basis for deducing which economic, social, demographic, cultural, or institutional conditions were most conducive to the development of mass schooling. Second, aggregate (usually national) estimates of past enrollment rates hide important differences in access to formal schooling determined by gender, ethnicity, religious affiliation, region, and locale (urban or rural)—differences that have considerable policy relevance today. They also gloss over important gaps between enrollment and attendance rates, which reveal interesting patterns of family-school relations and parental (un)willingness to comply with compulsory school laws. Third, educational data for the nineteenth century, especially prior to 1870, are often incomplete or nonexistent, even though this period was among the most formative in the development of mass schooling in Europe and the Americas. Fourth, many comparative

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3. Enrollment rates measure the extent to which a pre-defined age group was enrolled in a particular set of schools at a given educational level.

historical studies of schooling ignore key elements in the institutionalization of public, secular mass school systems (e.g., legal formalization, administrative centralization, grade sequencing, the linking of primary and post-primary courses of study). Studies of these elements would provide a more variegated and nuanced portrayal of historical and contemporary patterns of mass schooling. Finally, if educational expansion is endemic, following fairly rigid diffusion patterns as some have argued (Meyer et al., 1992; Clemens, 2004), then such findings diminish the analytical space for the discussion of new or alternative policy options.

In sum, taking into account the limitations of existing paths of scholarly inquiry and given our interest in developing a strategy which is not only historically informed, but also policy savvy, we have undertaken a third analytical strategy. As previously discussed, this approach essentially involves two steps: first, a delineation of analytical issues concerning the comparative institutionalization of mass schooling; and second, an examination of their historical emergence, including a description of the diverse meanings they embodied in different contexts and a discussion of the patterns of their evolution.

LEGAL-INSTITUTIONAL CONDITIONS

Compulsory Schooling and its Prolongation

Compulsory school legislation represents both an important enabling condition and a significant political intention in national attempts to universalize access to basic education. Whether by decree, proclamation, statute, law, or constitutional provision, government authorities set forth a legal basis for the establishment of systems of publicly funded, state-administered schools. Historically, newly independent nation-states often enacted legal provisions for compulsory schooling as they sought to consolidate their authority and control over a given territory and population. Many political leaders came to view the building of a national system of public secular schools as a conscious strategy to weaken the influence of religious institutions in local communities and to empower the state in its pursuit of industrialization and national unity. By compelling attendance in public secular schools, governments ensured that young children would receive instruction in basic literacy and numeracy as well as in "appropriate" (i.e., non-religious) moral precepts and political principles.

Colonial administrations established compulsory school laws and educational ordinances in dependent colonies, sparsely populated territories, and semi-autonomous regions even though, as was often the case, the resources needed to provide school spaces for all school-age children were insufficient.[4] Although unrealistic in scope, the enactment of compulsory school rules symbolized the importance and desirability of formalizing socialization

4. While the lack of implementation or enforcement of compulsory laws was not exclusive to non-independent political entities, it was much more pervasive than in independent countries.

frameworks for the young. In addition, they legitimated and bolstered efforts by missionaries and other private groups to construct and expand school buildings. Certainly, colonial policies supporting modern (in this case, Western) schooling were one means of securing native support for other government policies. Overall, the passage of compulsory school laws evinced the political intentions of public authorities, even if the laws were limited by design and infeasible to realize. They also forged a social contract between colonial administrations, religious groups, local communities, parents, and children. Below, we discuss key issues regarding the establishment, substance, and prolongation of compulsory schooling laws. We emphasize the lack of uniformity concerning the intentions and design of compulsory enrollment statutes throughout history, to say nothing of their actual impacts on the lives and routines of families and school-age children.

The Timing and Passage of Compulsory School Legislation

Today, over 90 percent of the world's countries have legally binding rules requiring children's school attendance (UNESCO, 2002; Benavot, 2002). The first such laws were enacted about 200 years ago in Prussia and Denmark (Soysal and Strange, 1989). Prior to these first laws, however, proclamations obligating parents to provide for the education of their children, not necessarily in schools, circulated in various European and North American communities such as Weimar, Massachusetts, Brunswick, and Gotha (Ramirez and Boli, 1993). Nordic families were urged by King and Church alike to educate their children in fundamental religious precepts, moral virtues, and the rudiments of reading and writing. Such proclamations—normative rather than legally binding—underscored the pivotal roles that religious authorities and families played in the early spread of literacy in Europe (Maynes, 1985; Graff, 1987; Mitch, 1992; Vincent, 2000).

   The establishment of compulsory mass schooling is best understood as an extended historical process, initially limited in geographical scope, in which education of the young moved out of the home and church and into the public sphere of differentiated schools. Ramirez and Boli (1993) describe this process as the institutionalization of Western models of socialization and propose three distinct stages of development. *Compulsory education* was a part of the Reformation movement to enhance religious piety and individual faith among Protestant families. It developed in the seventeenth century, mainly in Denmark, Norway, Sweden, and certain German principalities and North American colonies. *Mass schooling* was part of a movement to weaken family socialization and home-based instruction by establishing community schools with largely religious and fairly standardized curricula that emphasized the development of literacy, biblical knowledge, and moral character. It emerged in the eighteenth century, mainly in Norway, various Swiss cantons, Dutch provinces, and German *Länder*. Lastly, *compulsory mass schooling*, in which the nation-state became the central—if not the sole—initiator, guarantor, and administrator of an inter-connected system of schools, emerged in nineteenth century Europe and the Americas. Children of specified ages were legally

compelled to attend state-authorized schools for a stipulated number of days and weeks each year.

Most scholarly research focuses on the third stage, analyzing historical and comparative patterns in the development of compulsory mass schooling (e.g., Soysal and Strange, 1989; Ramirez and Ventresca, 1992; Mangan, 1994; Cummings, 2003). Historical case studies describe, in considerable detail, political developments that influenced the establishment or revision of compulsory education statutes in, for example, Thailand (Jumsai, 1951), Iraq (Clark, 1951), the Philippines (Isidro et al., 1952), Indonesia (Hutasott, 1954), South Korea (Central Education Research Institute, 1967), Prussia and Austria (van Horn Melton, 1988), Bavaria (Schleunes, 1989), and the United States (Glenn, 1988). Cross-national studies, on the other hand, analyze variations in the timing of compulsory schooling laws. For each country, a particular date is chosen to reflect either the creation of a national education system (Soysal and Strange, 1989) or the intentions of a government or governing body to require all children within defined age categories to attend school (Ramirez and Ventresca, 1992). Despite slight differences in the exact years used by researchers to designate the establishment of compulsory schooling in each country (and keeping in mind that laws and administrative rules were often rescinded, re-instated, or revised), the following basic patterns can be summarized:

- Several German states were the forerunners in passing compulsory education laws, beginning in the eighteenth century and continuing through the early nineteenth century.
- Almost all European countries—earlier in Western Europe, later in Eastern Europe—enacted compulsory school laws during the nineteenth century and the first three decades of the twentieth century.
- Although the United States never passed a federal law compelling school enrollment, individual states made provisions for compulsory schooling in state constitutions and/or legal statutes. Massachusetts passed its first compulsory attendance law in 1852, followed by states in the Northeast, Midwest, and the far West. In total, 33 states passed compulsory school laws during the nineteenth century; 17 states, mainly from the South, did so in the twentieth century. Interestingly, many western territories passed compulsory attendance laws prior to achieving statehood, in anticipation of subsequent settlement (Richardson, 1984; 1986).
- Most Southern and Central American countries passed compulsory school statutes fairly early during the nineteenth and twentieth centuries, although the term free and compulsory education was used "more as utopian projects than as any reflection of reality" (Garcia Garrido, 1986: 19).[5] Indeed,

5. Exemplifying the recurrent proclamations regarding compulsory schooling in Latin America, Garcia Garrido mentions the Paraguyan case: "Since independence in 1811, compulsory primary education was decreed by Rodrigo de Francia in 1828, by Lopez in 1844, by the Constitution of 1870, by the Law of 1887, by the Compulsory Education Law of 1909, by the subsequent law of 1924, by the Constitution of 1940 and, lastly, by the current

primary enrollment rates in the first half of the twentieth century were much lower in Latin America than in Europe or North America (Benavot and Riddle, 1988).

- About 80 percent of the 60 countries that were independent in 1945 had enacted compulsory attendance laws.
- Between 1945 and 2004, 125 former colonies and non-self-governing territories became independent in Asia, Africa, Europe, and parts of the Americas; 85 percent of these new states had passed compulsory school laws by 2000. As in the case of the United States, a significant number of former colonies had already passed educational ordinances that addressed pupil attendance prior to achieving independence.

Beyond these descriptive patterns, the literature addresses several analytical issues. For example, comparative analyses discovered an interesting link between the date of independence and the date at which compulsory schooling rules were enacted (Ramirez and Boli-Bennett, 1982). Based on information for over 55 countries, it appears that the lag between these two dates shortened in each successive wave of national independence. Whereas for countries that became independent in the nineteenth century, the mean lag period from independence until the passage of a compulsory schooling rule was between 25 to 50 years, this lag was reduced to less than 6 years during the first half of the twentieth century. Following World War II, newly independent countries typically passed a compulsory education law within about a year of becoming independent, although some countries, as previously noted, have yet to do so. Ramirez and Boli argue that this pattern illustrates that the ideology of compulsory education was not inherent in the formation of nation states during the eighteenth and nineteenth centuries, but became increasingly part of the nation-state model during the twentieth century. In recent decades, compulsory education has become closely intertwined with the array of activities undertaken by national governments. As Ramirez and Boli note, "The link between the state and education is complete and taken for granted" (1982: 29).

Other studies have examined the relationship between the extent of educational expansion and the timing of compulsory school legislation. Comparative evidence in Europe (Soysal and Strange, 1989) and across nations (Ramirez and Ventresca, 1992) indicates a weak association between these two variables. In some cases (e.g., Prussia, Denmark, Sweden, Japan), the adoption of compulsory school laws initiated a period of enrollment expansion. In others, mainly in South America, laws supporting compulsory education were enacted but rarely enforced. In the latter contexts, enrollment rates in elementary schools were limited at the time of formal enactment and remained relatively low throughout the nineteenth and early twentieth cen-

Constitution of 1967" (Garcia Garrido, 1986: 19). Although utopian proclamations in favor of mass schooling were voiced and passed by political leaders, well beyond the boundaries of the Americas, the disjuncture between the ideal and reality was apparently acute in Latin American educational history.

turies. In still other cases (e.g., Swiss cantons, France, most U.S. states), systems of mass schooling were already well in place when compulsory schooling legislation was passed. Even today, several countries lacking compulsory school laws (e.g., Singapore, Oman, Saudi Arabia) have achieved very high enrollment rates. Overall, it appears that pressures on new states to pass compulsory school laws following political independence have increased sharply over time. These expectations are only indirectly related to the actual (and future) expansion of a country's education system. Their impact on other features of educational modernization (e.g., teacher training, public financing of education, the building of schools) remains under-studied.[6]

Furthermore, historical evidence suggests that the political, social, and institutional meanings associated with the establishment of compulsory schooling varied significantly over time and place. In France, for example, the passage of such laws reflected an ongoing struggle between the Catholic Church and the state, while in Prussia and Scandinavian countries where the state mobilized Protestant churches to create national churches, support for mass schooling was ensured (Soysal and Strange, 1989; Schleunes, 1989). In Japan, compulsory education, long in gestation, owed much to comparisons to industrial leaders such as the United States and military competitors such as China (Japanese National Commission for UNESCO, 1958). In Ecuador, the compulsory attendance law of 1871 was meant to overcome the lack of interest in education among parents, on the one hand, and strongly rooted colonial prejudices against girls' schooling, on the other (Uzcategui, 1951). In dependent Indian States (i.e., Baroda, Kolhapur, Mysore) and parts of British India, the passage of compulsory school laws coincided with a "rising tide of nationalist opinion" (Saiyidain et al., 1952: 21). In Sri Lanka, the legislation to make education free and compulsory was intended to reduce child labor in coffee, rubber, and coconut plantations, and to create conditions for enrollment expansion (Little, 1998). In many Arab states, compulsory education laws reflected initial attempts to redress long-standing gender disparities in enrollment and attendance (UNESCO, 1956a). In the western territories of the United States, the passage of such laws anticipated actual settlement, crystallizing a blueprint for future development (Richardson, 1986). In short, although the establishment of compulsory school laws increasingly accompanied nation-state formation, the meanings and intentions of such legal provisions reflected diverse configurations of local political, economic, and cultural conditions.

The historical record suggests that political authorities employed widely different rationales to enact compulsory school laws. In some cases, the establishment of compulsory education addressed narrowly defined educational problems; in others, it was employed as a strategy to "solve" or defer solving

6. A state's commitment to educational expansion should be examined through measures beyond the passage of compulsory school legislation, important as this legislation may be. The public financing of building schools, the percentage of a nation's domestic product allocated to education, and other indicators of state investment in mass schooling may be better predictors of subsequent educational expansion.

long-standing economic, cultural, or social problems. In India, for example, the impact of several early initiatives towards compulsory education under British rule remained highly localized, even after the country became independent. According to Weiner (1991: 4–5), the Indian state was unable, or unwilling, to deal with pervasive low school enrollments and endemic child labor. He argues that this was not due to the country's precarious economic situation, but rather to deeply rooted beliefs among the Indian middle class about social order and hierarchy, the importance of education in reinforcing social class distinctions, and "concerns that 'excessive' and 'inappropriate' education for the poor would disrupt social arrangements" (Weiner, 1991: 5).

The Particularities of Compulsory School Laws

Below, we briefly discuss the contents of select compulsory attendance laws, with the aim of exposing forgotten, yet potentially interesting, historical particularities. We first examine the compulsory school ordinances passed in the Northwest Territories ceded to the Dominion of Canada by the Hudson Bay Trading Company in 1870. Settled in far flung trading posts, peopled by diverse populations of Indians, whites, and Métis, and served by religious missionaries representing Catholic, Methodist, and Anglican churches, the huge expanses of the Northwest Territories had little to speak of in the way of mass schooling (Kach and Mazurek, 1993). Nevertheless, during the last quarter of the nineteenth century, several compulsory education ordinances were enacted. In 1875, the earliest ordinance devised an initial blueprint for school expansion that, in effect, disenfranchised foreign immigrants and Native Americans and set forth demanding preconditions for the creation of schools. Subsequent ordinances, which sought to provide a stronger basis for school expansion, established school districts and separate school boards for Protestants and Catholics, each of whom was responsible for teacher certification, curricular guidelines, and school inspections. The ordinance of 1892 abolished the emergent framework of schools controlled by religious authorities in favor of a system of publicly supported and administered schools. Though this ordinance best exemplifies a modern, inclusionary legal statute for mass compulsory schooling, it carried important caveats in its rich details:

- "In every School District, where there are at least fifteen children of School age, resident within a radius of one mile and a half from the School House, it shall be compulsory for the Trustees of such District to keep the school open all year (section 186).

- "In every School District, where there are at least ten children of School age, it shall be compulsory for the Trustees of such District to leave their school in operation at least six months in every year (187).

- "Every parent, guardian or other person, resident in School District having control of any child or children, between ages seven and twelve years, shall be required to send such child or children to School for a period of at least twelve weeks in each year...(188).

- "It shall be the duty of the Trustees of every School District...after being notified that any parent or guardian...neglects or violates the provisions of the above section, to make complaint of such neglect to a Justice of the Peace...(189).

- "It shall be the duty of the Justice of the Peace to ascertain...the circumstances of any party complained of for not sending his or her child to School...and he shall accept any of the following as a reasonable excuse:

  1. That the child is under instruction in some other satisfactory manner;
  2. That the child has been prevented from attending School by sickness or any unavoidable cause;
  3. That there is no School open...not exceeding two and one half miles, measured according to the nearest passable road from the residence of the child;
  4. That such a child has reached a standard of education of the same or of a greater degree than that attained in the School of the School District within which such child resides (190)." [7]

These statutes are noteworthy in many respects. First and foremost, they formalized a web of social and institutional relationships between local communities, political bodies, elected officials, educational authorities, the legal system, and, naturally, parents, teachers, and children. For example, the establishment of compulsory schooling compelled action from multiple parties: the trustees of each school district were required to build, maintain, and operate schools; parents and guardians were required to send all their 7–12 year old children to school (barring officially recognized mitigating circumstances); school officials and community members were asked to report non-compliant parents; and judges were responsible for determining the reasons for, and consequences of, non-attendance. Second, the 1892 ordinance highlights the many contingencies associated with compulsory schooling. The establishment of schools depended on local population concentrations and age distributions; the length of the school term depended on the size of the school-age population; parental obligations were contingent on residential location (in relation to schools) and the provision of alternative educational opportunities at home. Third, these statutes underscore inequalities in school provisions—note the varying length of the school year and school session by district. Fourth, these statutes illustrate that compulsory education was not just a circumscribed relationship between the state (or territorial authority) and families with children, but an issue in which the wider community had a stake, for example, in ensuring parental compliance. Lastly and significantly, legislators who passed these statutes clearly acknowledged alternative avenues of educational provision, through home based instruction, private tutoring, or "some other satisfactory manner." Given the geographical and climatic

7. Ordinance of Northwest Territories, 1892, An Ordinance to Amend and Consolidate as Amended the Ordinance Respecting Schools, sections 186-190, quoted in Kach and Mazurek (1993: 170ff).

realities of northern Canadian communities, the importance (and perhaps the practical necessity) of home-based instruction is understandable.

A realistic approach to free and compulsory education, one that acknowledges the widely diverse material and cultural conditions of the communities to be covered by educational statutes, was also apparent in the 1950s, when newly independent nations began passing and implementing compulsory school legislation. In Pakistan, for example, authorities encouraged different provinces to develop their own multi-year schemes to establish compulsory education in gradual stages, taking into account historical ordinances as well as the actual distribution of school facilities, classrooms, qualified teachers, attendance patterns, and the possibility of regular supervision and enforcement (Huq, 1954). Burma and Cambodia employed pilot projects and provisional solutions, especially in relation to existing religious and private schools, as a mechanism for enlarging the scope and coverage of compulsory education (UNESCO, 1954). Owing to harsh economic conditions and limited public budgets, many countries introduced special measures to help fund and maintain primary schools—for example, village-based financing (Laos), or obligatory parental contributions to school budgets in the form of cash, material, or labor (Philippines). To encourage parents to send their children to school, and to improve the well being of enrolled pupils, primary schools in Mauritius provided free milk and yeast each day to pupils (UNESCO, 1954: 68). Additional strategies intended to boost public support for compulsory education and to increase regular pupil attendance included curricular reforms in public schools, changes in languages of instruction, and teacher involvement in community life.

Nevertheless, public authorities knew they were fighting a protracted, uphill battle to institutionalize mass schooling and compel attendance. As a result, early compulsory attendance statutes included many categories of exemptions based on conditions such as geographical location, physical and mental disabilities of children or parents, access to home instruction, agricultural cycles, and household poverty levels.

In short, though there are few instances of newly independent countries having directly opposed the basic principle of free and compulsory schooling, political leaders openly acknowledged that material and cultural conditions in their countries made it virtually impossible to implement this principle in practice. A close examination of the contents of compulsory school legislation illustrates the degree to which diverse social realities were acknowledged and considered, even as the principle was being institutionalized and as political leaders envisioned the development of elaborate public school systems.

International Organizations' Impacts on Compulsory Education in Newly Independent Countries

On December 10, 1948, the United Nations adopted the Universal Declaration of Human Rights (UDHR). Article 26 of the Declaration stated emphatically: "Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall

be compulsory...."[8] Signatories of the UDHR committed themselves to the goal of providing school places for all children and were expected to implement legislation making schooling compulsory. By compelling attendance in school, political authorities sought to enable each child to exercise his or her right to education. Depending on the nature of educational provisions, governments were under considerable international pressure to either stipulate the minimum duration of school attendance and the age groups to be enrolled or to establish laws prolonging the duration of compulsory schooling. Where compulsory education was well established and included primary education, the extension of the school-leaving age into post-primary or secondary education was expected. Where only part of the primary cycle was mandatory, compulsory education was to be prolonged to include the full length of the primary cycle. Where no compulsory school laws existed, there was pressure to pass such laws and, in doing so, to expand access to primary education.

The positions and declarations adopted by member states attending regional UNESCO conferences on Free and Compulsory Education in the 1950s (Bombay 1952, Cairo 1955, Lima 1956) reflected the results of this international pressure. The Bombay conference recommended compulsory education for no less than seven years, whereas the Cairo and Lima conferences recommended compulsory education for a minimum of six years. (In Latin America, it was understood that this did not necessarily apply to rural areas, where the duration was often only three years.) All regional conferences recognized the legal obligation of states to expand provisions for primary education—compulsory attendance was unrealistic unless schools were available and essentially free (i.e., no tuition, although fees for school books were allowed). Even when the financial means to provide school spaces for all school-age children were insufficient, governments enacted compulsory school laws to crystallize their commitment to free and universal education.

8. When the term fundamental education was used in the UDHR, it meant the right to education for illiterate adults and others who were denied the opportunity to receive a full elementary education during their youth. The term was first used by the Preparatory Commission of UNESCO in preparing documents for UNESCO's 1st General Conference held in November 1946. Despite some uncertainty over the term, there was considerable consensus that fundamental education meant an education that would provide for the acquisition of literacy and other essential knowledge, including skills and values needed to fully participate in society (UNESCO, 2000). The definition of fundamental education is very similar to today's concept of basic education. The main difference is that the former term emphasizes the immediate needs of community while the later term conceives of education as preparation for life-long learning. In operational terms, fundamental education was mainly understood as community education (e.g., adult literacy programs, agricultural and health education). Fundamental education and adult education were considered two aspects of the French term: popular education. In the early 1960s, especially with the independence of former colonies, international focus on adult education—a more established term among UN member states—widened to include literacy and the learning needs of adults who had not received any formal education during childhood. In general, attention shifted away from fundamental education and emphasis on the eradication of illiteracy increased.

In short, although quite a few former colonies had passed limited educational ordinances prior to independence (e.g., India, Philippines, Iraq, Malaya), there is little doubt that international organizations played a leading role in the passage of compulsory attendance legislation in newly independent states.

The Prolongation of Compulsory Education

In the 1950s, international policy discussions on compulsory schooling typically revolved around the establishment of an inclusive law that defined the minimum number of years that children would be required to attend school and, when possible, the extension of this period. In practice, this meant that countries were encouraged to define two age boundaries: first, the entry age, when parents were expected to enroll their children in school; and second, the minimum exit age, when children could leave school and either remain at home or enter the labor market.

Interestingly, few comparative historical studies have examined the social, political, and economic forces affecting changes in the duration (as distinct from the timing) of compulsory schooling. Nevertheless, initial evidence suggests that different sets of factors affected long-term changes in the age boundaries of compulsory education. On the one hand, the entrance age boundary became more fixed over time. To the degree that evolving conceptions of childhood and child development, women's labor force participation, and the availability of certified teachers influenced this boundary, compulsory education incorporated younger and younger children. On the other hand, the exit age changed more frequently (to include older and older youth) and was more influenced by the passage of child labor laws, the demand for youth labor, changing norms regarding marriage and family formation, the expansion of secondary schooling, and budgetary constraints.

In 1927, the International Labour Office asked the International Bureau of Education (IBE) to carry out an international survey of the duration of compulsory schooling, to inform new policies for raising the school-leaving age (IBE, 1932). Table 1 compares the results from this survey with present-day figures on the duration of compulsory schooling for over 42 education systems. During the 70-year interval between 1930 and 2000, the vast majority of education systems (68 percent) made no change to the entrance age of compulsory schooling. By contrast, 85 percent of systems raised the exit age of compulsory education, usually by 1 or 2 years, but in some cases by 3 or 4 years. In addition, it can be assumed that for many countries in the 1930s, especially in Eastern Europe, Latin America, and Asia, laws stipulating the entrance and exit ages of compulsory schooling reflected intentions more than realities, with few enforcement mechanisms in place. Today, even in cases when the age parameters of compulsory schooling have changed little since 1930, the disjuncture between legal statutes and educational realities has been significantly reduced. Finally, the systems compared in Table 1 show a certain degree of institutional convergence. Over time, cross-national variation in the entrance and exit ages of compulsory education has been reduced.

Table 1: Long-term Trends in the Age Boundaries of Compulsory Schooling, 1930–2000

Country	Ages entering and leaving compulsory schooling, circa 1930	Ages entering and leaving compulsory schooling, circa 2000
Austria	6–14	6–15
Belgium	6–14	6–18
Denmark	7–14	7–16
England	5–14	5–16
Finland	7–15	7–16
France	6–13	6–16
Greece	6–12	6–15
Iceland	7–14 (towns)/10–14 (country)	6–16
Ireland	6–14	6–15
Italy	6–12	6–15
Luxembourg	7–14	6–15
Netherlands	6–13	6–17
New Zealand	7–14	6–16
Norway	7–14	6–16
Portugal	7–11	6–15
Spain	6–14	6–16
Sweden	7–14	7–16
Albania	6–12	6–14
Bulgaria	7–14	7–15
Czechoslovakia/Czech Rep.	6–14	6–15
Estonia	8–16	7–15
Hungary	6–15	7–16
Latvia	7–14	7–15
Lithuania	7–12	7–16
Poland	7–14	7–18
Romania	5–14	7–16
USSR/ Russian Federation	8–15	6–15
Argentina	6–14	6–15
Brazil	7–14	7–14
Costa Rica	7–14	6–15
Ecuador	6–14	6–14
Guatemala	7–14	6–15
Haiti	6–14	6–15
Mexico	6–14	6–15
Paraguay	7–14	6–14
Uruguay	6–14	6–15
China	6–14	6–14
Egypt	Not compulsory	6–14
India	6–11	6–14
Japan	6–14	6–15
Tunisia	Not compulsory	6–16
Turkey	7–12	6–14

Sources: *Bulletin of the International Bureau of Education* (1932) 23 (2): 51–53; and Table 4 in UNESCO-EFA *Global Monitoring Report (2003/4) Gender and Education for All*. Paris: UNESCO.

Analyses of contemporary patterns of compulsory schooling, involving a greater number of national education systems, reveal several interesting patterns. First, among the 90 percent of countries having passed compulsory attendance laws, considerable variation is apparent in the duration of compulsory schooling. In some countries, pupils are expected to attend school for only 4–5 years (e.g., São Tomé, Equatorial Guinea, Bangladesh, Nepal, Vietnam, Iran), while other countries compel attendance for as long as 12–13 years (e.g., Netherlands, Saint Kitts, Germany, Belgium, Brunei). Second, there appears to be a fairly strong association between a country's income level and the duration of compulsory education (Benavot, 2002). Third, in recent decades, the mean duration of compulsory schooling (which typically begins at age 5 or 6) has increased by a full year, from a global average of 7.2 years (86 countries) in 1965 to 8.2 years (169 countries) in 2000. During this period, European and North American countries mandated, on average, between 8 to 10 years of compulsory education. In other regions, the mean duration was as follows: 8.3 years in Latin America and the Caribbean, 7.9 years in the Middle East and North Africa, 7.8 years in Asia and the Pacific, and 7.2 years in sub-Saharan Africa. In all world regions, except Sub-Saharan Africa, the trend over time has been to prolong compulsory schooling. In Sub-Saharan Africa, by contrast, there has been a decline in the mean duration of compulsory education, especially since 1995, reflecting the inability of countries in this region to mobilize the necessary financial resources to pay for, and enforce, 7 or 8 years of compulsory schooling.

Conclusion

Although discussions of compulsory schooling today are overwhelmingly taken for granted, the establishment of compulsory mass schooling involved different logics, interests, and approaches. When former colonies established a legal framework for compulsory attendance following independence, they drew upon different historical experiences and rationales. Typically, the political authorities in newly independent nations moved quickly to adopt the legal and ideological garb of compulsory education. The laws they passed were not only rich in content, but also full of qualifications and exemptions. In retrospect, they reveal the rather realistic and sanguine approach of supporters of compulsory mass schooling to the implementation process and its chances for success. These supporters explicitly built many accommodations and contingencies into the process, which was to be carried out over a prolonged period. These historical realities should be revisited as discussions turn to contemporary strategies to achieve universal basic education.

SYSTEMIZATION PROCESSES

The Formation of National School Systems

A distinctive feature of modern education is its systemic character. From an analytical perspective, the transformation of disparate educational frame-

works into an organized, interconnected system involved at least two processes: the formation of a national system of schools and the standardization of educational forms. In Europe, the creation of national education systems entailed a drawn-out process whereby most—if not all—types of education were placed under one umbrella and administered through an integrated state bureaucracy. This process parallels the "unification" of a state education system, as discussed by Archer (1979: 174): "…the incorporation or development of diverse establishments, activities and personnel under a central national and specifically educational framework of administration." In such systems, government authorities, typically located in a central ministry, oversaw all state-regulated schools through the licensing and inspection of school institutions, the recruitment, training, and certification of teachers, the determination of curricular contents, and the development of nationally recognized qualifications. Thus, the extent of centralization in educational governance is a key analytical feature of the formation of national education systems.

In addition, various processes of standardization accompanied the growth of national school systems. Schools at different educational levels—pre-primary, primary, secondary, and higher education—were classified into standard, hierarchical categories. Increased standardization of curricula, examinations, and certification enabled the articulation and coordination of different educational levels. The actual level of standardization depended, to a large extent, on the extent of centralization within the educational system. Nevertheless, far from being the outcome of innocuous bureaucratic decisions and directives, standardization often touched upon salient social, cultural, and political tensions. Among other things, authorities had to determine the status of religious schools as well as the role of private or voluntary associations in educational affairs. Thus, the formation of national education systems created at least two difficult dilemmas for state administrators, one dealing with the relationship between religious and secular education, and the other involving the relationship between public and private education. Although the two dilemmas are interrelated (most private schools were also religious ones), for the purpose of clear analysis, we prefer to deal with them separately. The public versus private dilemma stresses the role and authority of the state in the finance, governance, and regulation of education, while the religious versus secular dilemma focuses on the conflict over worldviews and values (Western, Christian, Muslim, Buddhist, etc.).

We characterize early models of national education systems and address three core dilemmas that have accompanied systemization in the past: 1) the extent of centralization or decentralization in educational governance; 2) the tension between public schools and private schools; and 3) the tension between religious education and secular education.

Early Models of National Education Systems

The first major national education systems in Europe—Prussian and French—included an expanding framework of secular public schools based

on compulsory school laws and a strong state administrative apparatus.[9] These distinctive features have defined the foundations of many education systems throughout the world ever since. In addition, the education systems of England, the United States, the Soviet Union, and Japan constituted basic models that influenced educational systemization in different world regions. Below we briefly describe these early national education systems.

In Prussia, under King Frederick II (1740–1786), the state came to assume an active and expansive role in the mobilization of society for economic, technical, and scientific progress. This involved the establishment of state-authorized schools, the development of a common state-mandated curriculum, and the creation of an administrative structure to oversee and inspect state-financed schools. The 1794 General Code specified the details of this system and represented a move towards both systemization and the affirmation of the state as the central authority responsible for national education (Maynes, 1985; Cummings, 1997). By the 1830s, Prussia had built an extensive national network of public elementary schools, providing education for most children until the age of 14, as well as an elaborate system of elite secondary schools. As public institutions, schools were authorized and inspected by the state, teachers were trained and licensed by the state, and the curriculum was developed by state officials and regulated by national examinations (Green, 1990: 3).

Whereas the creation of the Prussian education system was an integral part of the state formation process, in France, the state was already well consolidated and, as early as the seventeenth century, a central state apparatus had emerged. This extremely centralized administration was the foundation for the education system created by Napoleon, who placed schools under the authority of a central university, regional academies, departments, and local communes. The early systemization of education in France owed much to the power and authority of this centralized royal bureaucracy, even though the emphasis was on elite educational institutions in the form of lycées and *grandes écoles* (Durkheim, 1977). Popular education, by contrast, was limited and largely under the auspices of the Catholic Church. The creation and incorporation of elementary schools into the French education system occurred only after the Revolution. In 1833, François Guizot established a national system of basic education following the model shaped in the Napoleonic era. *Loi Guizot* (the Guizot Law) extended state control over teacher licensing and school inspection, and attempted to expand primary schooling to each of the French communes. Only with the Ferry law in 1882, however, did elementary education become free and compulsory in France (Ringer, 1979; Garnier, Hage, and Fuller, 1989; Cummings, 1997).

These early national education systems can be understood as conscious strategies to address three critical needs in nascent states: 1) the need to shape citizens' loyalty through the inculcation of ideologies of nationhood, 2) the

9. The educational reform in Piedmont (Italy) in 1729 is considered by many as the first attempt to build a state education system in Europe. We prefer to focus on the Prussian and French cases because of their formative influences on later education systems.

need to provide the state with trained public administrators and military personnel, and 3) the need to mobilize society for economic purposes and industrial development.

In Prussia, expanding public schooling served to consolidate a nation, create a public administration, and further economic development. In France, the systemization of education not only aimed to address these purposes, but also to undermine the power of the Catholic Church and enhance citizens' loyalty to the state. Both the Prussian and French models of systemization were extremely influential in other parts of Europe and in South America and were adapted in different ways in nascent state structures by dominant social classes (Green, 1990: 4).

The creation of a national education system in England was late in coming (almost 100 years after France and Prussia), despite extensive industrialization. Political factors, especially the decentralized nature of the English state, accounted in part for the absence of mass compulsory schooling and the late timing of educational systemization (Green, 1990: 309). In contrast to continental Europe, political transformations in England brought an end to absolutism by the seventeenth century. During the subsequent two centuries, England established a relatively stable ruling class and experienced few external military threats, social revolutions, or problems related to economic backwardness similar to those faced by elites on the continent (Green, 1990: 312). Thus, nation building and economic development were not the main driving forces for the creation of a national education system in England.

Many members of the English elite feared that educating the commoner would contribute to political malcontent and revolutionary outbursts as had occurred in France, and preferred the spread of elitist "public" schools, which aimed at nurturing knowledgeable and refined gentlemen. Other segments of the elite sought to broaden notions of citizenship, including political enfranchisement, and viewed the education of the masses as a focal point for their reform efforts. During the late nineteenth and early twentieth centuries, the enactment of a series of legal provisions increased the educational responsibilities of the central state as well as local governments. These changes led to the creation of new educational institutions serving the children of common English citizens, effectively supplementing existing institutions that had long served the offspring of political and economic elites. Nevertheless, the English education system, which was based on deeply rooted principles of charity and local initiative, was not nearly as well coordinated and integrated as continental education systems (Green, 1990: 310–11).

One important motivating factor in the establishment of education systems in Europe was the incorporation of distinct ethnic and cultural groups within an integrated national territory. This often meant the imposition of a national language and a dominant culture with which the ruling elite identified (Bendix, 1969; Breuilly, 1982; Gellner, 1983; P. Anderson, 1991). Elites often banned or restricted local languages and dialects in order to create national "imagined communities" (B. Anderson, 1983). In France, the move

to linguistic homogenization succeeded in eliminating dialects such as Breton and Patois; in Spain, however, this initiative made few inroads with the Catalan and Basque languages, which were later revived and bolstered. Homogenization weakened many local and ethnic traditions, but these traditions continued to act as a source of social and economic inequalities, especially in relation to educational opportunities. Citizens belonging to cultural groups or geographical regions in which the official language was not completely rooted remained at a disadvantage.

In the United States, individual states, rather than the federal government, had sovereign power over education. No national education system developed, although certain federal regulations required territories to make educational provisions as a condition of entry into the Union (Tyack, 1976). Between 1830 and 1870, northern states developed systems of public schools, financed from public sources and administered by state and county boards of education (Green, 1990). The moral "crusade" of the common-school movement during this period, suffused with religious and ideological themes, resulted in the very high enrollments of young children in community-built and publicly funded schools (Tyack, James, and Benavot, 1987). In fact, outside of the South, school enrollment rates were actually higher in predominantly rural and agricultural states than in more urban ones (Meyer et al., 1979; Walters and O'Connell, 1988; Baker, 1999). As the government planned and established settlements in the Western territories, they sold or rented public lands in order to raise funds for the building of local schools (Richardson, 1986). Overall, despite the lack of a centralized bureaucracy, the educational structures created in United States, based on mass compulsory schooling and extensive public spending, approximated a national education system (Green, 1990).

In the Soviet Union, the creation and expansion of a national education system emerged out of the Bolshevik Revolution (Matthews, 1982). Key principles of Soviet education, established in 1918, continued to influence educational patterns until the breakup of the Soviet Union. In particular, Soviet authorities developed mass educational institutions to improve literacy levels, enhance meritocratic principles, and pursue industrial development (Cummings, 2003: 27–29). The structure of Soviet education followed highly rational, hierarchical, and bureaucratic lines of authority, which extended from the central ministry through various regional and district levels until they reached school directors, classroom teachers, and pupils. As part of an explicit strategy of national development, the education system expanded to support collective state objectives. Given these ideological concerns, the state fully subsidized education and public authorities prepared detailed plans for human resource development and manpower utilization. Central planning, which accentuated the needs of the national economy and the state above those of individual pupils, permeated the system (Grant, 1979; Whittacer, 1991; Eklof and Dneprov, 1993). The Soviet model strongly influenced the education systems of Communist block countries, many of which adopted substantial features of Soviet ideology and practice. Other communist countries (Cuba,

Vietnam, and China) also borrowed heavily from the Soviet model (Noah, 1986), even though the Soviet presence itself was less pervasive.

In Japan, following the abolition of feudalism and the Meiji Revolution of 1868, educational reform was a key element in the reorganization of national institutions and the creation of a central bureaucracy. The Meiji leaders sought to use education as a means of enhancing national solidarity, training a technically competent labor force, and developing a more future-oriented elite (Cummings, 1980; Westney, 1987; Shimahara, 1979). Several statutes issued during the last decades of the nineteenth century resulted in the consolidation of existing elementary schools, which included ordinary, girls', village, paupers', private, and infants' schools. They also created a centralized educational administration, a national system for the production of textbooks, and uniform finance and personnel policies (Japanese National Commission for UNESCO, 1958). As a consequence, the new regulations appreciably reduced inter- and intra-regional differences in per student expenditures in public schools. This centralized approach brought about considerable uniformity in resource allocation and administrative procedures (Cummings, 1980).

In the cases of the Soviet Union, Japan, and China (Hawkins, 1974), the creation of a national education system resulted from major political transformations and the rupturing of ancient regimes. The centralized and hierarchical organization of the newly constituted education systems reflected the basic governmental structures that emerged in the wake of these social revolutions (i.e., highly centralized, strong bureaucracies).

National Education Systems in Postcolonial States

Newly independent countries, with different histories of colonial rule and economic dependence, built systems of schooling that were fundamentally shaped by powerful external and internal political processes (Clignet and Foster, 1964; King, 1990; Carnoy and Samoff, 1990). Governments in the West typically used the formation of national education systems to further state consolidation, economic improvement, and nation building. Postcolonial states faced additional challenges, including the legacies of colonial education, the transformation of uneven and highly dependent economies, and the creation of national political identities from disparate ethnic affinities brought together under colonial partitions (Altbach and Kelly, 1984).

The education systems established in Africa and Asia struggled with English, French, Portuguese, German, and Dutch colonial legacies that lasted well into the twentieth century. Latin American states, best viewed as "old" dependencies in relation to the new states of Africa and Asia, also confronted patterns of educational stagnation (with the exception of Argentina). European colonialism may have created a relatively educated, even modernizing, elite, but it also bequeathed weak and uneven infrastructures for the development of mass education (Coleman, 1965). Scholars have commented on the diminished influence of Portugal on education in its colonies. During colonial times, the English-speaking world had a pervasive influence on the

Portuguese colony of Mozambique; until the mid-1920s, Protestant mission schools outnumbered Catholic ones in Mozambique (Nóvoa et al., 2002), and the former were seen as endangering Portuguese colonial authority (Cross, 1987). As early as the 1930s, Brazil had already detached itself from Portugal and did not consider the imperial power a point of reference in educational matters (Nóvoa et al., 2002).

Following independence, government authorities in many African and Asian countries expanded education as a means of facilitating national solidarity and economic development. Inspired by socialist and egalitarian ideals, and seeking to harness the widespread support of populist independence movements, national leaders and intellectuals envisioned optimistic scenarios that linked educational expansion with national development ingrained in African values (Makulu, 1971: 34). These progressive ideals, however, encountered colonial legacies in which the educational philosophy and structures of European countries had been uncritically transferred to their colonies (Coleman, 1965: 37). The transfer of educational models was even reinforced by the fact that local elites would continue to get their education in Europe. Foreign languages of instruction, imported cultural values, and elite-oriented schools rooted in colonial policies conditioned subsequent developments in the newly formed national education systems.

Religious organizations and colonial administrations had not only created schools with strong exogenous orientations, they had also actively hindered the activities of indigenous educational institutions. Many traditional educational frameworks experienced severe dislocation, as they were unable to compete with the programs and positions offered by mission schools and colonial authorities. Others were dismantled or "eliminated" when colonial authorities suspected them of inculcating nationalism or fomenting rebellion (Carnoy, 1974; Di Bona, 1981)

Although the educational legacies of European colonialism were far reaching, many scholars in postcolonial states have moved beyond blaming current conditions of educational malaise on past colonial policies. For example, Gauhar (1981: 64) contends that the "deplorable" state of education in many African countries is the responsibility of their own leaders; many children are deprived access to schools, sharpening ethnic divisions, and others become alienated from native values and worldviews. Khan (1981: 17–21) claims that the basic nature of formal education in Muslim areas has changed little since independence, apart from its quantitative expansion. In the long shadow of unmet targets to achieve free and universal education, enrollment rates in primary education have increased slowly, whereas secondary and higher education enrollments have increased more quickly. Eager to ensure their children's mobility, elite groups pressured governments to increase access to secondary and higher education, even though teaching standards and student academic expectations in such institutions were often poor.

Nation building was a critical concern of the Latin American education systems created in the aftermath of independence. The ideology of constructing a nation reflected a shift from an exclusionary policy in colonial times to a

more inclusionary one after statehood (Rama, 1983: 15–16). Spanish and Portuguese authorities secured their domination in part by excluding the descendants of the conquered race from cultural resources and valued knowledge. By ensuring the continued illiteracy of indigenous peoples in the language used for official and market transactions, authorities maintained political control over "the broad masses of the socially inferior." Colonial educational policies focused primarily on strengthening the elite Latin American universities, which typically emphasized legal and theological training.

After independence, education was viewed as a means of enhancing political participation and was used as a prerequisite for citizenship (e.g., illiterates were disqualified from voting). Expanding educational opportunity reflected the "sacred responsibility of governments to educate the sovereign for the full exercise of his rights," and education was, in theory, accessible for all (Rama, 1983: 17). Notwithstanding this modern participatory discourse, educational developments on the ground remained stagnant. A highly unequal supply of schools clearly favored the urban proletariat over the rural masses. Despite the relatively high esteem accorded to education, demand varied greatly among social groups. This can be explained partly by the underdevelopment of democratic institutions in Latin America (Gale, 1969: 105).

Rama (1983) suggests that three interrelated elements—state action, educational demand, and the degree of educational differentiation—evolved into a limited number of core educational models in Latin America. When restrictive state policies were combined with a demand for education among the upper classes and a fraction of the middle class, then an *exclusive* model emerged. When the upper and middle classes came to predominate, and were confronted with state policies favoring integration, then a *segmentary* model resulted. When the middle classes and popular classes joined to demand education, but the state, representing the dominant groups, restricted participation and limited aspirations for social mobility, then a *classist* model emerged. And finally, when the middle class and popular classes joined together and called on the state to increase educational opportunities to alleviate social inequalities, then a *universalist* model resulted. Variations of these models have featured prominently in the development of Latin American education systems.

Among Latin American states, a sense of national unity took centuries to create. And yet, this national unity has left many minority cultures completely marginalized, especially groups such as the Quechua and Araya-speaking Indians in the altiplano of Bolivia, the Incas of Peru, and indigenous peoples in Mexico (Chiapas), Colombia, and Ecuador.

Nation building and national solidarity were prime objectives for educational expansion in Southeast Asia (e.g., Indonesia, Singapore, Malaysia, Philippines, and Thailand). Owing to strong regional loyalties and a plurality of ethnic groups, issues of social integration and national unity were critical concerns. In addition, colonial educational legacies in this region (with the exception of independent Siam) differed significantly from other regions. To begin with, most countries in southeastern Asia had centuries-old education-

al traditions. Special pagoda schools existed in Buddhist monasteries. In Hindu areas, the *padepokan* served not only as a meeting place for villagers, but also as a center of learning and religious instruction. Later, with the introduction of Islam, young Muslim boys in Indonesia and Malaysia acquired simple literacy skills in the *pesantren*, *surau*, or Qur'anic classes. In other settings, temple priests became the main instructors in small village schools. Christian missionaries, who arrived in the region with the influx of European traders, established mission schools that provided rudimentary education to some children. Moreover, colonial education policies in the region, especially in the British colonies, followed a laissez-faire policy, allowing different ethnic groups to develop separate educational institutions. In Malaysia, for instance, there were Malay, Chinese, and Tamil vernacular schools, as well as English medium schools, which were run mainly by Christian missions (Wong, 1973: 129–39).

Finally, following independence, many states in this region actively sought ways to integrate the diverse array of preexisting schools into their emergent national education systems. Instead of closing or prohibiting religious schools, including missionary ones, new governments employed different strategies to adapt them to national purposes. In Burma, for instance, three systems of education were melded into one uniform system following independence. In Malaysia, government policies towards school curricula became a means of integrating diverse schools into a more uniform education system (Wong, 1973). The Malaysian government ended separate vernacular schools (Chinese, Tamil, etc.) and replaced them with a single type of primary school. English medium schools remained open, although the government instructed these schools to reorganize their curricula with a stronger emphasis on Malaysian content. In Singapore, parents were encouraged to send their children to English medium schools rather than Chinese medium schools, in part because interethnic interaction was greater in the former.

This broad characterization of the formation of national education systems informs our discussion of three issues that accompanied systemization: centralization versus decentralization, private education versus public education, and religious education versus secular education.

Centralization and Decentralization in National Education Systems

Archer (1979) argues that the basic structure of an educational system—centralized versus decentralized—had important effects on the nature of school provisions. A centralized bureaucracy was better positioned to engineer education systems by ensuring clearer ties and better coordination among various parts of the system. Centralization promoted, for example, closer linkages among teacher training programs, intended curricular policies, and national systems of examinations. Decentralized education systems, on the other hand, involved less explicit controls and oversight of educational purposes, practices, and processes, and thus facilitated more heterogeneous outcomes. As we have discussed, nations that developed strong state structures created more centralized educational bureaucracies, whereas nations with

weak state structures or those organized into federal polities tended to construct more decentralized education systems. Historically, Prussia, France, Spain, Portugal, and much of Scandinavia best exemplify the more centralized systems; England, the United States, Switzerland, and Belgium are prominent examples of more decentralized systems. As Green (1990: 311) maintains, "…forms of national [education] systems reflected the nature of the state which created them."

Since the end of the 1970s, a neo-liberal discourse that stresses the value of decentralization has pervaded national policies of educational governance. Concepts such as efficiency, local participation, power delegation and devolution, de-concentration, school autonomy, and parental choice have circulated extensively in national and international policy forums (see Bray, 1999; Whitty et al., 1998; Dutercq, 2001). In the early 1990s, a survey of developed countries found that after a decade of policies focused on decentralization, the concentration of educational power and decision-making authority had been re-allocated across central, intermediate, and local levels, creating new modes of governance and regulation (Rideout and Ural, 1993). While centralized governance is still relatively strong in France, it has been significantly reduced in Sweden and Norway (Lauglo, 1990; Hutmacher, 2001).

Despite the historical development of distinct models of educational governance in Europe and North America, rooted in varying state formation processes and socio-political conditions, recent trends suggest a growing convergence among countries. On the one hand, nations with highly centralized systems, such as France and Sweden, have incorporated some degree of educational decentralization by means of deregulation, the devolution of central power, and greater school autonomy (for other European examples, see Brock and Tulasiewicz, 2000). On the other hand, countries with historically decentralized education systems, such as Britain and the United States, have increased centralization by adopting national laws, creating national goals and standards, or using national funds to equalize local district expenditures. Converging on the middle, most education systems are establishing various policies of decentralized governance, even in the area of curricula (Astiz et al., 2002).

The centralization-decentralization distinction has considerably less analytical value when examining postcolonial education systems, in contrast to European and North American systems. Centralized educational structures predominated when newly independent nations first established national school systems. The reasons for this vary, but many argue that the exigencies of political independence movements, which brought together diverse—even antagonistic—ethnic and cultural groups to oppose colonial occupation, left an indelible mark of centralistic power. In addition, continental models of educational governance that favored centralization—particularly in France, Spain, and Portugal—significantly conditioned educational developments in many former colonies (Makulu, 1971: 59; Waggoner and Waggoner, 1971: 17; Gale, 1969: 15).

In recent years, most decentralization policies in less-developed states have been recommended or instigated by international organizations. Rather

than being adapted to local institutional or political conditions, these policies often come "ready made." In the highly indebted countries of Latin America, decentralization measures have been imposed by loan organizations to reduce public expenditures, especially education costs. The actual implementation of decentralization policies varies by national context. For example, in Argentina and Chile, decentralization in educational governance has meant a shift in the locus of control, from national to regional (or provincial) governments, whereas in Brazil, it has meant a shift from state governments to local authorities. In all these cases, decentralization reforms took place within different regulatory frameworks and under different market conditions (Narodowski and Milagros, 2002).

Supporters of educational decentralization in Latin America marshal an ambitious range of rationales and objectives to advance their reforms: improvements in basic education, the mobilization of local actors, increased equity, greater school autonomy, and teacher empowerment. However, they tend to ignore or minimize the specific conditions in which the reforms are supposed to be implemented. For example, with limited budgets and tight financial restrictions, stagnating teacher salaries, and little systematic monitoring of educational outcomes, the success of decentralization policies is questionable. Paradoxes abound, some of which contradict the spirit of the reforms themselves. For instance, many teachers in the poorer provinces of Argentina and Brazil are unable to understand or carry out the curricular directives sent by government authorities, resulting in schools turning to private institutions to implement the school "autonomy" projects. Or, in the cases of El Salvador and Nicaragua, where educational regulations are minimal, financial resources are offered to individuals to establish self-managed schools (Braslavsky and Gvirtz, 2000).

In short, initial analyses of decentralization reforms in Latin America indicate that as authorities dramatically reduce public funding of education, private institutions (some partially supported by the state) begin to blossom. Middle- and upper-class parents gain access to private schools and leave deteriorated public schools to the poor. As a result, social and class inequalities in educational access deepen. Evidence suggests that decentralization reforms have adversely impacted the educational opportunities of children from lower socioeconomic strata.

In the past, many political authorities viewed educational centralization as a powerful means for creating national citizens, largely by subverting individuals' loyalties to local entities in competition with the emergent nation-state. By removing young children from parochial socialization frameworks, and by placing them in state-oriented educational or training contexts, political loyalties to the state (and the nation) were assured (Cohen, 1979: 113). In light of this, it is important to consider whether the economic and organizational discourses supporting decentralized governance may inadvertently undermine the political outcomes to which state-directed, mass education systems have contributed in the past.

The Tension between Private Schools and Public Education

The principle that national education systems should provide free and compulsory education is deeply engrained in the modern world. In other words, it is widely believed that every child should have access to formal education in state-sponsored, public schools (Green, 1990: 3). The development of public financing of elementary schools by nation states was a long, drawn-out process. Notwithstanding compulsory education statutes, European states did not immediately assume responsibility for the financing of schooling, and supporters of public finance confronted powerful private-school networks. Prussia and France succeeded in financing elementary schooling at a relatively early stage, and public funding encouraged families to withdraw their children from private institutions. By 1861, public elementary schools in Prussia outnumbered private schools by a ratio of 34 to 1 (Green, 1990: 3). In France, the Jules Ferry Law of 1881 rendered elementary education free. As a result, the state began to financially support private schools, a strategy of increasing control over these institutions (Reisner, 1927: 41). In the 1960s, the Guermeur and Debré Law organized and reinforced the state financing of private (mainly Catholic) schools, while demanding strict conformity to the national curriculum. These laws engendered different relationships between private schools and the state.

In England, until 1833, educational establishments were organized on a purely voluntary basis. They ranged from dame and charity schools at the primary level, owned and run by private individuals; through endowed public schools, which were founded, financed, and regulated by individual bequests; to the university colleges, which continually asserted their independence from state intervention or control (Vaughan and Archer, 1971: 209). Private sponsors funded and governed the elite system of English "public" schools, many of which trace their history back several hundred years (Walford, 1984).

A different set of issues confronted former colonies. In Southeast Asia, private schools, mainly mission schools, provided a general education in British Malaya, Singapore, and the Borneo territories. In these and other parts of Asia, private schools existed at the primary level, but played a much more significant role at the secondary level. Private schools were independent and relied solely on school fees, although they were subject to governmental regulations and were expected to follow the same curriculum as the public state schools (Wong, 1973: 49–50). In the Philippines, the private sector dominated education at the secondary level (79 percent of enrollments in 1975) but less so at the primary level (only 5 percent of enrollments). The strong demand for education among Filipino elites accounted in part for the considerable investment of private capital in secondary educational institutions. Schools, colleges, and universities operated as profit-making stock corporations and even declared dividends in their stocks. The extensive private-education sector in the country has done little to ensure high standards for quality in all private schools, many of which suffer from poorly trained teachers and run-down facilities and equipment (Wong, 1973: 77).

Contemporary Patterns

In recent decades, the vast majority of education systems have accommodated various forms of private schooling at the primary and secondary levels (Cummings and Riddell, 1994) though world regions vary significantly in the degree to which they rely on the private sector at each level (see Table 2). Private schooling has generally been more prevalent at the secondary level than at the primary level. World regions vary significantly.

Table 2: The Mean Percentage of Private Primary and Secondary Enrollments, by World Region, circa 1980

	Percentage of primary enrollments in private schools	Percentage of secondary enrollments in private schools	Range
Developed countries	14.3	18.6	1–98
Latin America	17.5	29.5	0–76
Sub-Saharan Africa	24.9	30.3	0–99
North Africa/Middle East	9.1	10.9	0–61
Asia	11.8	27.3	0–93

Source: Cummings and Riddell, 1994.

Although types of private schooling vary significantly, schools can be classified by their legal standing vis-à-vis the state and by their mode of finance. Specifically, we can ask whether a state has passed regulations or laws legalizing private schooling and, if so, under what conditions they are allowed to exist (i.e., the extent of state regulation). We can also ask what proportions of school budgets are derived from private sources or from governmental ones. Combining this information determines the overall parameters of private schooling at each educational level. Generally, private schools that are legally recognized and largely financed through public funds belong to the national education system. These private schools incorporate the national curriculum and must submit to national supervision.

States with highly centralized education systems tend to fully subsidize education and to discourage private schooling. France, Russia, China, and Japan best exemplify this tendency. In former communist countries, education was considered an important investment for attaining collective state-defined goals. Thus, the state fully subsidized education and prepared detailed plans both for human resource development and manpower utilization. In contrast, states supporting decentralized education systems tend to admit private schools in parallel to the public-school network. England and the United States are prototypes of this modality.

Interest in the privatization of primary and secondary education has flourished in recent years. As weak economic growth or sluggish international trade creates fiscal crises, governments look for ways to reduce public expenditures, including the centralized funding of public education. In other contexts, government officials believe that the quality and effectiveness of educa-

tion can be enhanced through privatization and greater competition (and choice) among providers. As part of a broad shift from state-based to market-based development strategies, international organizations such as the World Bank and the IMF have actively supported moves by developing countries to privatize (and decentralize) education.

In Latin America, the move towards privatization (and the support of religious education) has been especially pronounced. According to Albornoz (1993), the Venezuelan government adopted a market discourse, in which people should be "trained" rather than "educated," and spoke about "the cost of education and its usefulness" in private-sector terms. Reforms in favor of private schools in Argentina and Chile have also relied on market-based discourses in their efforts to increase efficiency and reduce state costs. Recent studies suggest that private schooling has indeed expanded (Narodowski and Milagros, 2002). In Latin America, with its long history of class and institutional hierarchies, school labels such as *colegios* and *escuelas* articulate not only the private-sector–public-sector dichotomy, but also deep social inequalities (Albornoz, 1993).

In sum, decentralization policies, administrative school autonomy, voucher systems, and school competition reopen an old question about the value of public school versus private school—a question whose implications for ensuring free, high quality basic education are still being assessed.

The Tension Between Religious Institutions and Secular Education

Religion and education have a long, intertwined history. Early educational frameworks trained religious officials and members of the clergy. Over the years, religious leaders have taught and circulated their ideas, philosophies, and dogmas through education. Schools have been responsible for inculcating skills necessary for reading sacred texts and for keeping records of religious activities. Moral education and religious instruction have imbued the curricular contents of many secular schools. All major world religions have established schools to sustain religious movements and to ensure "accurate" interpretations of key religious doctrines.

Historically, the creation of national education systems entailed, in no small measure, the differentiation of education from other societal institutions, particularly religious ones. A public education system typically meant a secular system, which often resulted in hostile and antagonistic attitudes towards religion by state builders and modernizing elites. The extent to which, and the ways by which, the ties unraveled between educational and religious institutions varied considerably over time and place. They still do. Whereas in some countries the two institutions are wholly separated, in theory if not in practice, in other countries, religion continues to influence the education of young children. In Saudi Arabia and Israel, for example, religious education is an integral branch of the national education system. In France, by contrast, religious schools that do not adopt the official curriculum remain private institutions outside of the public system. In Spain, despite a constitutional prohibition against a state religion, the country's

dominant Roman Catholic Church has continued to enjoy preferential treatment by the government (Callahan, 1992).

The historical struggle between religious authorities and the state over the control of education is illustrated in its most extreme form in France. After the revolution, republicans were determined to build a new society by educating and socializing the young. The Republic prohibited religious teaching in schools and subsequently forbade priests to serve as teachers (Cummings, 1997). In 1801, the concordat between Napoleon and the Pope reinstated teaching privileges for church officials and reestablished state recognition of the Church as an educational authority. During much of the nineteenth century, primary education was in the hands of Christian schools and other congregations (Reisner, 1927: 34). Despite centralized control and a strong bureaucracy, French authorities delayed legal measures concerning compulsory education until 1882, mainly due to ongoing conflicts with the Church. The Ferry Law of 1882 resulted in the secularization of the primary school curriculum. For a state in which the official separation between state and church took place relatively early, a significant portion of education is still in the hands of religious authorities (Schneider, 1982: 10). In Spain, the church had an overwhelming influence on social life, including educational frameworks. In 1939, Franco re-established Roman Catholicism as the state religion and required all pupils (even non-Catholics) to learn about religion in school. Although Spain's new constitution (1978) separated church and state, classes in religion remained and the state continued its subsidy of ecclesiastical schools, attended by one third of the children (Callahan, 1998). Attempts by the Socialist party to liberalize education did little to reduce the influence of the Roman Catholic Church.

In Belgium, as in France, the state-religion conflict over education persisted well into the twentieth century, and produced two parallel education systems based on the constitutionally guaranteed freedom of education. In addition to a public system operated by the state and the communities, there was a "free" system organized by the Catholic Church. After 1884, under a Catholic government, a protracted process ended in the equalization of the "free" schools with the community schools. In 1914, the equalization of state support for all elementary schools was legally confirmed (Schneider, 1982: 10). In Prussia, the law of 1810 made education a secular activity (Green, 1990: 3). Although religion was not forbidden, only certified teachers could provide religious education in public schools (Cummings, 1997). The Soviet Union pursued an extreme model of separating state-sponsored education from religious influences. After the revolution, all schools supported by the Orthodox Church were abolished.

In the United States, both the strong moral and religious orientations of the citizenry and a fear of state interference in religious affairs influenced the differentiation of religion and education. Many early settlers came to America to establish "God's kingdom on earth," where individuals could communicate directly with God, rather than through the intervention of church officials. The ability to read the Bible was an essential element in personal commun-

ion; thus, the early Puritan settlements placed a strong emphasis on literacy and schooling. The U.S. Constitution enshrined the principle of separation of church and state, but also asserted that education was the responsibility of local communities, who often tangibly and prominently displayed their religious sensibilities. Because schools in the United States received funds from public sources, the principle of separation of church and state led to a second distinctive feature—the elimination of religious and moral content from the formal school curriculum. Over time, religious values in the public school curriculum were transformed into civic values (Cummings, 1997). Nevertheless, only after *Brown v. Board of Education* (1954) were religious influences, mainly Protestant values, minimized in public schools (Tyack, James, and Benavot, 1987).

Our analysis of the religion-education nexus in postcolonial states concentrates on non-Christian countries and refers to three historical periods: the precolonial, colonial, and postcolonial periods. As we have discussed, prior to the introduction of Christianity in Asia and Africa, sophisticated Confucian and Muslim educational frameworks existed (Monroe, 1927; Lee, 2000). In Africa, before Islam swept the continent, indigenous systems of education were closely involved in child socialization. Even today, indigenous education remains widespread and diffuse, albeit with little institutional power. African families and communities expose their young children to myriads of African languages, part of a strong matrix of indigenous experiences that these children bring with them when they enter the public school system. Only in North Africa and the Nile Valley have indigenous languages been displaced by a powerful language of international currency (Arabic). In any case, the significance of the indigenous cultural values transmitted by African languages should not be minimized (Brock-Utne, 2000).

Islamic education developed concurrent to the spread of Islam to North Africa, and later to West Africa and parts of eastern and central Africa. Islamic schools and universities flourished centuries before the arrival of Christian evangelism and Western colonialism (Tibawi, 1972). Today, in over 35 African countries, Islam's influence in the shaping of culture and education is considerable (Fafunwa, 1982). The large network of Qur'anic schools, some of which have existed for centuries, serves as a powerful socializing mechanism, inculcating regional and communal identities (Morgan and Armer, 1988). Qur'anic schools are part of a multi-stage system. During the first stages, children are taught rudimentary knowledge of the Qur'an and then the alphabet of the Arabic language. During the advanced stage or "secondary level," a much broader and deeper curriculum is taught. This includes grammatical inflections, syntax, logic, arithmetic, algebra, rhetoric and versification, jurisprudence, scholastic theology, Islamic laws, and the traditions and commentaries of the Prophet. At the end of these studies, students (usually male) receive a "license" allowing them to practice as a teacher, *imam,* or *alkali*, depending on their area of specialization (Mathews and Akrawi, 1949; Fafunwa, 1982).

When Western missionaries arrived in Africa around the mid-nineteenth century, the first Christian missions on the continent were established.

English-speaking missionaries arrived in Nigeria in 1844, in Uganda after 1877, and in Congo-Leopoldville after 1878. Because "Christianity is a religion of the book," education became an important means for preaching and teaching the gospel. In addition, the building of mission schools improved relations between missionaries and colonial authorities, as both were concerned with "civilizing" local Africans, especially through the promotion of European values (Bray et al., 1986: 7). During the height of European colonialism before World War I, religious missions, supported and aided by colonial administrations, provided most education (Connell, 1980: 315). The main purpose of the missions was to gather and save souls, therefore they attempted to Christianize (civilize) without necessarily Westernizing (Yates, 1984). Subsequently, colonial administrations expanded government schools, although the growth in enrollments varied considerably depending on the imperial power (Benavot and Riddle, 1988). Colonial systems of education were conscious, systematic attempts to educate Africans away from their indigenous cultures (Fafunwa, 1982).

The relationship between Christian mission schools and colonial governments varied from one region to the next. In some instances, colonial governments banned mission schools completely. In most cases, however, mission schools and colonial administrations divided the labor of education, which resulted in different norms. In practice, this usually meant that Christian missions provided primary education for the natives, and the government provided post-primary schools for the children of the European settlers. Reading, writing, and arithmetic were the basic pillars of the colonial curriculum, in addition to religion (Morgan and Armer, 1988). The limited scope of this school curriculum remained largely unchanged despite increased government involvement in educational affairs. In the decades prior to World War II, the British Empire promoted common schooling in its colonies, especially in Africa (Whitehead, 1981). In the French colonies, education was essentially a means of producing a native aristocracy who propagated French ideals and upheld the French way of life. In British colonies, there was a greater tendency to "adapt" education to African realities. While British education embodied (at least superficially) the ideals of partnership and adaptation, French education stood for association and assimilation (Fafunwa, 1982). In Portuguese colonies, education aimed at evangelizing and civilizing Africans, as well as providing cheap manual labor. Missionary education for Africans was poor and ineffective, in sharp contrast to the education provided to white settlers or assimilated Africans (Cross, 1987).

African parents were initially reluctant to send their children to the mission and government schools, but did so in greater numbers beginning in the early twentieth century (Knight, 1955; Connell, 1980: 314; Kelly, 2000). The mounting pressure of the new social order induced Africans to seek out mission schools. The acquisition of reading, writing, and basic Western knowledge in "bush," "village," or "out" schools became vital for sharing in the progress that the colonizers promised (Connell, 1980: 315). Under European colonialism, many traditional education systems disappeared—first shad-

owed by ever-increasing mission schools and later pushed out by the more extensive education systems of colonial governments.

National education systems became an important tool for shaping the character of new nations following independence. Government attitudes towards mission schools ranged from eradication to accommodation. In most states, education became a secular responsibility, although the ideological commitment to secularization varied. In much of Africa, the public partnerships that had enabled church-based educational frameworks came to an end, and many mission schools were banned outright (Makulu, 1971: 14). African leaders at the UNESCO-sponsored conference held in Addis Ababa in 1961 declared, "If it is to fulfill its many functions satisfactorily, education in Africa must be African, that is, it must rest on a foundation of a specifically African culture and be based on special requirements of African progress in all fields" (ECA/UNESCO, 1961: v). Among other things, creating a truly African education system meant limiting foreign (Western) influences and asserting state control over private and mission schools.

The tendency to accommodate traditional educational frameworks was much more pronounced in Southeast Asia. Most governments decided to take advantage of previously existing (mainly religious) institutions and found ways to integrate religious education into their national systems. In the Philippines and Indonesia, educational provisions were significantly strengthened without destroying relatively autonomous mission schools. Over time, however, the curricula, practices, and teacher qualifications of the latter converged with those of the public schools. In Thailand, despite strong government control, the private education system continued to flourish (Wong, 1973).

Historical Bridges between Religion and Modern Education

Because mass schooling first emerged in Christian areas, it could plausibly be asserted that Christian values are most compatible with modern educational forms. Nevertheless, European and U.S. educational history underscores the overt tensions between Christianity and modern secular education. Since World War II, different forms of accommodation between religious authorities and public administrations have evolved. Among non-Christian religions, many perceive Confucianism, Taoism, and Hinduism as more compatible with modern education than Islam, which is often depicted as relatively antagonistic towards "modern" sensibilities and educational values. Below, we consider whether, and how, postcolonial states integrated traditional and religious values in their national education systems and question the implications this may have had for contemporary policies of universal education.

For most commentators, Japan confirms the positive effects of accommodating traditional religious values in modern educational forms. Since the Meiji Revolution, when Japan imported Western educational forms and suffused them with traditional Japanese values, educational and material conditions have improved significantly. Nevertheless, it is worth recalling that American administrators forced Japan to remove all religious content from the curriculum after World War II, as it was thought to have contributed to

Japanese imperialism and "aggression." In recent decades, by contrast, explanations of the superior performance of Japanese pupils (especially in relation to U.S. pupils) in international achievement studies tend to highlight the successful integration of traditional cultural values and modern educational practices (Fuller et al., 1986).

At the beginning of the twentieth century, China experimented with the integration of religious and Western values. The Nationalist government, established in 1901, sought to produce scholarly gentry through the incorporation of Western educational practices and approaches. Concurrently, the Nationalist government promoted Confucianism to bolster and legitimate its political power. Chinese traditions encouraged an unquestioning trust in authority and conformity with collective goals. Under the slogan "Chinese learning as the essence and Western learning for its utilitarian purposes," educational facilities increased rapidly in China before 1949 (Kwong, 1979; 1988). Nevertheless, the educational successes of the anti-religious Communist regimes leave little reason to draw an unambiguous positive assessment of the role of religion in Chinese education.

In the 1960s, after a wave of de-colonization, many scholars believed that Western forms of schooling could not be mixed with traditional African education in the ways envisioned by African leaders (Coleman, 1965: 53). The historical record does not strongly support this assessment. For example, in many Muslim areas where the penetration of Christian missions was minimal, a considerable number of Islamic schools remained in place (Matthews and Akrawi, 1949). While some of these schools continued to concentrate on Qur'anic verses by way of rote learning, others, notably in Tunisia, taught an elementary-school course in Arabic, with French as a second language, which was comparable to that offered in the public sector. In select schools in Algeria and Tunisia, quality secondary education in a traditional Arabic culture was available (notably in the College Sadiki in Tunis). In addition, higher studies could be pursued in a wide spectrum of Islamic universities in the Middle East (Morgan and Armer, 1988). Findings from the Islamic region of north Nigeria (Kano) suggest that the two education systems—one modern and the other (*Islamiyya*) integrating Western and Qur'anic curricula—have successfully accommodated each other. In both systems, enrollments and achievement levels have increased (Morgan and Armer, 1988).

The historical record in West Africa and elsewhere shows that, despite opposition from the traditionalists, "internal" reforms to Islamic education (i.e., the introduction of modern secular subjects from within) have been more successful than those attempted by colonial authorities (Fisher, 1969). Western perceptions of Islamic education as inherently inflexible or backward are not borne out by the evidence (Fortna, 2002: 1). According to Brenner (2000: 307), the so-called Islamic fundamentalism can be better understood as an effort to combine Muslim doctrine with contemporary technologies of power, most of which have their origin in European culture. It would seem that the advance of Western rationalist ideology makes possible the appearance of many contemporary forms of Islamism.

Finally, many European education systems are now reexamining the relationship between state secular education and religious sensibilities. Especially in countries with large numbers of Muslim immigrants such as Germany, Britain, and France, public debates on the separation between state and church have reopened. In the past, they involved the adherents of Catholicism, Protestantism, or Judaism; today, the parents of Muslim and Sikh children demand that state schools recognize their freedom of religious expression. In France, Catholic organizations are among the most vociferous defenders of secularism in the education system, seeking to avoid a new ideological struggle around religion similar to those of the past. Discussions concerning the right of Muslims to wear traditional clothes in public schools have also emerged in Spain.

Conclusion

Policies that advance localization and decentralization as strategies for improving the efficiency of national education systems were conceived and consolidated in the West. They aimed at replacing large, stable, but cumbersome state bureaucracies with more flexible, effective, responsive modes of educational governance. When applied to centralized education systems, decentralization measures in some instances reduced state expenditures but may also have had socially regressive effects, especially when pursued in badly funded or highly unequal systems. In Latin America, the movement towards decentralization brought about a "renaissance" of private and religious education, but class inequalities in educational access apparently increased. These developments illustrate how key aspects of the systemization process (i.e., centralization or decentralization, secularization, and privatization) have important implications for social inequalities and equity issues.

In Muslim areas, and in parts of Africa, the secular versus religious dilemma represents a totally different picture. Western education is still perceived as "imported" foreign education, promoted first by Christian missionaries and later by colonial governments. Modern education represents a force that has previously undermined indigenous traditions, Muslim culture, and Muslim educational frameworks. When former colonies achieved independence, secular education gained supremacy and many mission schools were dismantled. African states and Islamic countries, often supported by foreign aid programs and international organizations, later launched ambitious universal education campaigns. Although educational spending and enrollments have increased, these have rarely produced the impressive socioeconomic developments that international experts predicted. Economic growth, still heavily dependent on primary commodities, has been illusive. Many elites view modern education as having facilitated social unrest through increased unemployment, dissonance between traditional and modern values, and intergenerational conflict. Many Muslim scholars wonder whether, and how, modern education and Muslim culture can be accommodated. In the past, colonial governments attempted to undermine local education systems. International agencies also ignored them. In many Asian countries, however,

different accommodations between traditional values and modern educational practices have proved much more successful. We think that there is much to be gained from examining how countries accomplished this challenging task in the past.

INEQUALITY AND EQUITY ISSUES

The Historical Legacies of Elitist and Democratic Education

Schools (or equivalent educational frameworks) have existed in many ancient civilizations, including Egypt, China, Rome, and Greece (Cohen, 1979). The basic function of these schools was to socialize and train an elite class who would govern and administer the country or empire. The education of elite classes entailed the acquisition of knowledge and skills related to warfare, diplomacy, religion, and politics. Additional emphasis was placed on the development of character, virtue, and refinement. These educational frameworks were expected to instill loyalty to the central power and to construct a clear status boundary between the literate, cultured elite and the illiterate commoners.

Schools devoted to the consolidation and reproduction of elites through the education of the children of privileged or propertied classes have a long history in Europe (Ringer, 1979; Bourdieu, 1996; Cookson and Percell, 1985; Cummings, 2003). In Germany, the education of the cultured upper middle class, in contrast to the business-oriented upper middle class, stressed personal cultivation, probity, and social courtesy. The education of French elites emphasized linguistic proficiency, academic distinction, and devoted service to the state, either in administrative or military affairs. The English public schools, which were the principal training ground for the attainment of elite status, inculcated a sense of honor, faith, entitlement, and privilege, together with a willingness to serve and defend the country and British Empire. In practice, membership in European elite classes, whether political, economic, or cultural, meant receiving a classical academic education involving a rigorous program of humanistic, and sometimes scientific, studies at a selective institution or boarding school.

Although private institutions had served the children of dominant classes in the United States since the founding of the early colonies, democratic and egalitarian views permeated the historical development of schooling (Bailyn, 1960; Cremin, 1970; Tyack, 1974; Kaestle, 1983). Widespread but locally controlled schools, education as a means for creating literate (Bible reading) and morally upright citizens, and "having the rich and the poor educated together"—these notions not only reflected important ideological legacies of the nation's founding fathers, but also were considered indispensable for the survival of the republic (Ulich, 1967). Such ideas, supported by strong Protestant principles, infused the common school movement in the nineteenth century, and had important consequences for the spread of schooling in both rural and urban areas. By the end of the nineteenth century, enroll-

ment in elementary schools (public and private) was almost universal. The expansion of secondary education in the United States was unprecedented, with enrollment rates increasing from 7 percent of the youth population in 1890 to 80 percent in the 1960s (Ulich, 1967: 242–3). The American high school was the first entirely free secondary school in the world (Green, 1990: 17). By the end of the twentieth century, the provision of post-primary educational opportunities in the United States outranked all other countries, with the possible exception of Japan (Cummings, 1997).

Nevertheless, race, ethnicity, and immigrant status strongly affected access to, and completion of, secondary and higher education in the United States. Notwithstanding egalitarian conceptions and doctrines of equal opportunity, many of which became the object of U.S. Supreme Court rulings, racial and ethnic inequalities in educational outcomes continued unabated throughout the twentieth century. Many American educators questioned whether a strategy of equal educational opportunity was sufficient to substantially reduce educational inequalities. Only through compensatory measures, they maintained, would real progress in access to secondary and higher education be attained (Cummings, 1997).

From Elitist to Popular Education in Europe

The meritocratic ideal—that individuals, whatever their origins, should be given opportunities to carry their talents to full realization through education—was late in coming to Europe (Ringer, 1979; Maynes, 1985). So, too, was the related notion that national progress depends on the extent to which a society provides educational services that enable all its citizens to develop their talents and capabilities. Traditional European forms of secondary education, provided in a gymnasium, lycée, "public," or grammar school, represented an advanced stage of liberal education and a narrow gateway to higher social and occupational statuses. Indeed, throughout Europe, academic secondary schools began as institutions serving universities, with the purpose of preparing upper-class youth for study in higher education. Thus, securing meritocratic ideals meant, in practical terms, that secondary education would need to be democratized, thereby reducing, even eliminating, the class advantages of elite children (Sutton, 1965). Moreover, institutions of secondary education were firmly entrenched in rigid selection mechanisms. These had produced bifurcated structures: on the one hand, a variety of academic-oriented secondary education systems, including preparatory classes for secondary schools, were mainly reserved for the children of higher status families or those who could afford to pay tuition fees; on the other hand, short-term and typically terminal programs provided access to primary (and some post-primary) education for the children of the popular classes.

From a historical perspective, the shift from elitist to more inclusive education systems involved several, not always sequentially organized, transformations. Many countries made an early transition by broadening access to primary schools while simultaneously increasing the number of traditionally elitist secondary schools. In some areas, selective secondary schools, which

had exclusively served the aristocracy, began catering to the needs of the growing bourgeoisie and urban middle classes. Another important turning point was the alteration of secondary education entrance examinations, especially the degree to which meritocratic criteria supplanted class-based ones. Many European countries began developing new national entry examinations with stronger academic or IQ-like elements. Pupils who succeeded in these exams were allowed to enroll in elite secondary schools. Children who were unsuccessful, or who chose not to sit for the exams, could remain in school for several additional grades or enroll in vocational programs or tracks, both of which were considered less desirable alternatives.

In the aftermath of World War II, especially with the ascendance of the United States as the major economic and political superpower, intergovernmental organizations such as UNESCO and OECD began articulating progressive American ideas and lent their support to principles of equal educational opportunity. The use of highly selective entry examinations came under severe criticism as an obstacle to the "democratization" of secondary education. In many countries, an array of observation and counseling procedures eventually replaced these exams. The new procedures were meant not to select pupils, but to classify them according to their abilities, interests, and achievements at the conclusion of an extended period of compulsory education.

The prolongation of compulsory education by two to four years (see Table 1) not only extended formal schooling, but served, at least in theory, to universalize access to (lower) secondary education. In many instances, the supply of grammar schools, lycées, and gymnasiums was too limited to meet the increasing demand for secondary education. Moreover, the traditional curriculum, stressing classical languages and academic subjects, was called into question because it contained subject emphases of less value to heterogeneous student populations. Initiatives to expand and diversify secondary education systems gained momentum, including the reinvigoration or addition of various types of vocational and technical education to existing classical and modern curricula (Resnik, 2001).

Significantly, the post-World War II transformation of secondary education occurred during a particularly activist and dynamic period in European political history. The move to ensure greater educational opportunities and reduce social inequalities corresponded to political developments in Western Europe, in particular the ascension to power of democratic socialist parties (Wittrock et al., 1991). Led by cadres of political leaders imbued with strong modernizing visions and a post-war "trenches" feeling of solidarity, many European governments launched large-scale educational reforms including the extension of compulsory education, the establishment of more inclusive school types, and the massive expansion of secondary school enrollments. Though the pace and outcomes of these changes varied from country to country, the transformation of secondary education became a central target of reformists' plans. Indeed, the shift to mass secondary education involved not only a structural change, but also a major social shift. States that had historically created sharp institutional (and class) divisions between primary and

secondary education moved to construct a more integrated and less class-based tripartite system involving primary, lower-secondary, and upper-secondary education.

In the wake of these reform initiatives, three basic types of European education systems emerged (Schneider, 1982):

- The Scandinavian comprehensive school (Norway, Denmark, Sweden, and Finland). School reforms in Scandinavia led to the joining of primary and middle schools into a nine-year basic (and compulsory) program of comprehensive schooling. The new system (nine years of primary education and three to four years of post-primary education) was legally institutionalized in Sweden (1962), Finland (1970), and Denmark (1975).
- The mixed systems found in Great Britain, France, and Italy. Specific equivalents to the comprehensive schools were legally implemented without, however, relegating the compulsory education of all pupils to one type of basic school.
- The traditional systems found in Austria, Belgium, the Netherlands, and in most German *Länder* and Swiss cantons. Legislated reforms created a less comprehensive integration of secondary schools and specific national patterns of subdivided systems dominate in these countries. The tripartite system usually included the classic, modern, and technical secondary schools, which form separate tracks.

Expanding Secondary Education in Postcolonial States

Two "American" principles—one, that societies should avoid "wasting talent" and two, that secondary education should be open to all academically capable youth, regardless of social background—not only took root in Europe after World War II, but also gained support in education systems throughout the world. Social science experts, as well as intergovernmental organizations, were instrumental in the circulation of these emergent "democratic" conceptions of secondary schooling. Although the transformation of secondary education in the United States and Europe followed in the wake of a long period of primary education consolidation and universalization, in Africa, Asia, and Latin America, widespread illiteracy, low quality instruction, and educational wastage in primary schools remained salient problems when secondary schooling became the object of reform (Rama, 1983).

Furthermore, colonial legacies had contributed to idiosyncratic educational structures in many developing countries. During the colonial era, educational frameworks in Africa and Asia were institutionally segmented, elitist, and racially divided; most contributed to furthering Western hegemony and domination over native populations. In many African colonies, for example, indigenous children learned rudimentary skills in mission or village "bush" schools, but few passed the rigorous examinations for entrance into upper-elementary or secondary grades. At the same time, colonial authorities actively developed modern academic and technical education for the children of European settlers. Such schools nurtured an elite, racially exclusive group

with a shared culture and ideology, who held a monopoly over high-level skills taught in academic schools (King, 1990).

Following independence, African and Asian governments were exposed to two types of pressures: the commitment of their leaders to weaken or dismantle the educational vestiges of colonial rule and the pressure from international agencies to expand education as a condition for socioeconomic development. Certain educational structures were democratized—massive efforts were undertaken to advance free and compulsory primary education (UNESCO, 1958). However, governments rarely transformed the underlying principles and policies that had governed secondary education during the colonial period. In former French and Belgian colonies, for example, a reluctance to break away from policies that had originated under French rule limited the conceptualization and design of educational reforms (Johnson, 1987). More often than not, the elitist character of secondary education remained virtually unchanged: literary and academic instruction continued to be emphasized over practical training or market skills; rote learning continued to dominate classroom interactions; and schooling remained driven by examinations (Khan, 1981). The educational standards of former imperial powers cast long shadows over the curricular contents and educational qualifications in African and Asian secondary schools. Most newly independent regimes lacked the necessary resources to implement major changes to secondary education. Others have argued, however, that retaining the educational status quo served the interests of newly empowered elites (Gauhar, 1981; Khan, 1981).

As in Africa and Asia, secondary education in Latin America mirrored European institutions, which were predominantly elitist and academic in character. Due to the long-term politicization of education and the historical emphasis on higher education (both public and private), Latin American countries developed extremely unequal educational structures in which university sectors flourished (enrollment rates approximated those in Europe) while primary education languished. Secondary schools mainly served as highly selective institutional channels for university entrance and the attainment of elite status. Although universal education was legislated in most Latin America countries, the laws were unevenly applied. Children in urban areas enjoyed vastly superior educational opportunities and mobility prospects than those residing in rural areas. The rising social demand for education, the need to elicit support from politically dominant groups to meet these demands, and the limited resources with which educational reforms were implemented led many Latin American states to view educational reform as a necessary first step to reduce social inequalities. Parties representing middle classes called for an extension of secondary education and greater access to higher education, even though inequalities in elementary education were rampant (Rama, 1983).

Over time, educational developments in some postcolonial states created new problems. In countries that vigorously expanded access to primary education, many school graduates faced a severe shortage of secondary schools as

well as a dearth of job opportunities or training programs in the labor market. These problems were accentuated as the overall social demand for education increased (Johnson, 1987). In Muslim countries where secondary education had been expanded, "armies of educated unemployed youth" reflected the unmet needs of the professional labor market (Khan, 1981). Ethiopia and countries in Francophone Africa encountered similar problems (Germa, 1982; Johnson, 1987). In short, although many viewed the expansion and transformation of secondary education as a universal mandate relevant to all less-developed school systems, educational realities on the ground undermined the realization of this mandate in most postcolonial states.

During the 1970s and 1980s, international agencies encouraged developing countries to adopt new types of educational innovations based on human capital models and neoliberal approaches to education. These included the restructuring and diversification of schools, a greater curricular emphasis on practical education, policies to upgrade teacher training and qualifications, and the introduction of new technologies and pedagogical approaches. Initially rejected by many national educational authorities, especially in Francophone Africa, such innovations were perceived as "neo-colonial" attempts by international powers to impose new forms of "second-class" education. Still, initial modifications diminished the elite character of secondary education. For example, some countries established programs in agricultural, craft and technical training, and lifelong learning. Others incorporated new teaching methods, indigenous languages, and community leaders into the structure and content of their education systems (Johnson, 1987).

In sum, many postcolonial states have committed themselves ideologically in recent decades to the transformation and expansion of traditional secondary schools to serve more diverse educational, social, and economic purposes. Although an increasing number of states adhere to this policy position, actual reforms to secondary education sectors have been limited and uneven. Private secondary schools have grown to satisfy unmet demand among advantaged social classes. More often than not, this expansion has not increased democratization but instead increased segmentation of different social strata.

Despite the many differences in the massification of secondary education in Africa, Asia, and Latin America, several common characteristics may be observed. First, universal access to and completion of primary education have yet to be achieved. Second, the limited extension of secondary education mainly serves elite groups and advantaged social classes. Third, reforms to secondary education have rarely improved social mobility or social and economic conditions for the vast majority of the population. Educational principles circulated by intergovernmental organizations played an influential role in reforming national educational policies, but patterns of educational expansion at the primary, secondary, and tertiary levels, historically unbalanced in postcolonial states, continue to generate substantial social and spatial inequalities.

Hierarchy, Diversification, and Comprehensiveness in Secondary Education

The historical transformation of secondary education involved at least three interrelated shifts: 1) the expansion of the purposes of secondary schooling; 2) the establishment of new selection mechanisms (or the discontinuation of old ones) to ease the transition between primary and secondary education; and 3) the development of diversified programs of study, curricular offerings, and/or school types, which address the heterogeneous interests and needs of expanding student populations. Our previous discussion concentrated on the first two shifts; we examine the third shift below. Historical initiatives to reshape and diversify the contours of secondary schooling encompassed a wide range of structural and programmatic reforms (Kandel, 1930). We discuss several prominent examples in the movement towards diversification.

Incorporating Science and Vocational Training: England and Germany

Secondary education in England traditionally entailed an intellectually demanding program of academic studies in the classical languages, history, geography, and the humanistic evolution of Western civilization. Revisions to the academic curriculum in England were slow in coming (Goodson, 1987). Although England was the most advanced industrial society, scientific and technological studies, vocational training, and apprenticeship were almost completely disregarded. The privileged economic situation of the British Empire, as well as their confidence in the ability of grammar schools to create an elite class of cultured gentlemen imbued with an ethos of honor, service, and entitlement, provided little impetus for educational innovation. Moreover, as the Taunton Commission[10] (1864–8) later explained, England had produced a bevy of outstanding inventors, engineers, and industrialists, most of whom had little or no formal education. The country's laissez-faire reliance on self-made men to carry its economy forward partly explains its historically weak emphasis on science instruction, both pure and applied. Indeed, as late as 1800, there were virtually no facilities for technical or industrial education in England, and interest in science-oriented instruction in secondary schools was minimal.

Things began to change as the preeminence of British industries deteriorated in the later part of the nineteenth century, especially due to growing competition in overseas markets. Political leaders and academic elites alike increasingly recognized that science and technology play influential roles in national life. Oxford and Cambridge established professorships and study programs in the natural and physical sciences. The study of science, primarily academic in nature, gained visibility at all levels of the English education system. Schools increasingly encouraged the teaching of technical subjects, also based on a textbook approach.

10. The Taunton Commission on secondary education publicized the lack of grammar schools in many towns and recommended the establishment of rate-aided secondary schools and increasing girls' access to secondary education.

An even more significant step towards technical education developed among institutes providing further education to adult workers, typically after work hours. In the early nineteenth century, the first "Mechanics Institutes" were founded (in Glasgow, Edinburgh, Haddington, and London) with the aim of "instructing artisans in scientific principles of the arts and manufactures" and "diffusing useful knowledge." These institutes not only offered classes in general education, they also established a tradition of emphasizing scientific and technical education over practical craft instruction. This tradition was to persist well into the twentieth century. Overall, the tendency to associate secondary education with academic studies (mainly the classics) and technical education with further education for adults contributed to the weak status of science education and the slow development of vocational education in English schools.

German history offers a richly contrasting model of incorporating science instruction and vocational training into public schools. Much earlier than other countries, German leaders viewed science and technology as key factors for industrial development and created a complex and well-integrated framework of vocational secondary education. Vocational programs were seen not only as preparing working-class children for entrance into the labor market, but also as an effective means for their moral socialization and civic training. General "improvement" schools, whose sessions were first held on Sundays and evenings, were introduced in order to supplement the "imperfect" general education of working-class boys and girls. Legislation compelled industrial employers to allow workers under the age of 18 to attend such "improvement" schools (Beckwith, 1913). Over the course of the nineteenth century, German authorities established a variety of industrial schools: supplemental schools for young workers, middle-technical and trade schools for master tradesmen and lower grade technicians, and highly advanced and scientifically oriented technical high schools for the leaders of industries. These industrial schools were funded and supported by private individuals, guilds, trade unions, merchants' associations, and towns.

A central aspect of vocational education that emerged in Germany was the formalization of an elaborate system of training and apprenticeships. The system encouraged young adolescents (apprentices) to acquire practical vocational training in industrial workshops, rather than in school, within the parameters set forth in legally binding contracts. When combined with limited school-based courses, this dual system became the cornerstone of a German model that mediated the transition of young people from the completion of compulsory education into various occupational statuses in the labor market.

Overall, industrial and technical education in Germany evolved concurrently with the spread of universal schooling. Indeed, vocational education was central to the movement to extend compulsory schooling. Industrial education in German secondary schools was fundamentally linked to the preeminence of scientific and technological studies in German institutions of higher education. Although the gymnasium privileged high-status classical studies, the *Ober-realschule*, with its strong scientific bias, was also highly regarded. In

contrast to England, scientific and technological studies in Germany were not considered an "unsuitable" education for respectable citizens. The German state viewed technical education and apprenticeship programs as moral education and technical training for young people destined for industrial positions. Nevertheless, scholars have commented that vocational education in Germany typically reinforced paternalistic attitudes by government officials and strengthened existing social divisions (the *stande*) in German society. Immediately after their completion of compulsory education, pupils from lower social strata entered the world of work through apprenticeship programs, thereby foregoing opportunities to enter institutions of higher learning and, through them, to improve their socioeconomic status.

The contrasting English and German approaches to vocational education paralleled developments in other parts of Europe. In some countries, such as France and Italy, the status of technical and vocational education was marginalized in relation to academic secondary education. In other countries, such as Switzerland and Austria, key aspects of the German model were adopted and vocational education and training became integral, relatively high-status components of post-primary schooling. During the 1900–1945 period, the introduction of new vocational and technical education programs slowed. Continued reliance upon on-the-job training and a corresponding skepticism about the benefits of textbook-based technical instruction contributed to the indifference towards the application of scientific research in secondary schools (Evans, 1982).

After World War II, however, vocational education experienced a period of relative rejuvenation in Europe. Many governments expanded vocational, technical, and further education programs as well as instruction in the pure and applied sciences at tertiary-level institutions. Shortages of trained manpower and the cost of industrial weakness in the face of increased competitiveness justified official policies in support of these programs. In addition, interest in the industrial application of research and development grew markedly, increasing the demand for middle- and high-level scientists, technologists, and technicians. Current and future workers became interested in obtaining vocational education and training (VET) qualifications because their salary and promotion prospects were increasingly tied to these (Evans, 1982: 227–8).

In short, the expansion and diversification of secondary education in post–World War II Europe was greatly influenced by the development of vocational education frameworks, on the one hand, and the incorporation of science and technology subjects in previously humanities-dominated school curricula, on the other. Although their historical circumstances differed, most European governments become convinced of the benefits of vocational education and training and developed policies in support of VET. Many parents and academics, however, held less sanguine views about the benefits of VET. In any case, popular demands to improve equality in educational opportunity were often used by the supporters of vocational education to defend its status in a reformed secondary education sector.

Comprehensive Schooling in the United States

Emerging in the late nineteenth century and flourishing in the years following World War I, the comprehensive high school embodied a uniquely American vision of post-primary education. It sought to encapsulate democratic values and pragmatic principles by combining the academic, college-preparatory purposes of small, often private, academies with a broad set of curricular offerings that addressed the interests and occupational aspirations of an increasingly diverse student population (Commission on the Reorganization of Secondary Education, 1918). The model of the comprehensive high school had roots in psychological studies on human intelligence (e.g., Thorndike's multifaceted approach), in Dewey's (1916) pragmatic educational philosophy (e.g., schools should train pupils to use their wits and talents in order to better serve society), and in utilitarian views of education's relationship to the labor market (e.g., vocational courses, which enable more manually inclined pupils to realize their potentialities, serve both the individual and the industrializing economy) (Schmida, 1964).

The comprehensive high school not only reflected an anti-elitist, egalitarian ideal in which academically and socially diverse students studied a common core of curricular subjects, but also fostered the "elective principle," allowing students to choose from a wide range of course offerings (Vaizey, 1965). In addition to Latin, biology, history, and physical education, high schools offered "practical" subjects such as shop, home economics, basket weaving, or driver's training (Ulich, 1967). This curricular structure, better adapted to the heterogeneity of talents and abilities among the youth population, called into question the relevance of the humanities-oriented academic programs found in Europe (Sutton, 1965: 60). It also problematized the practice of selecting and channeling students into separate academic and vocational secondary schools at a relatively young age. Emerging studies on human multiple intelligences opposed selection mechanisms and favored fully articulated counseling systems (Conant, 1959). Far from being elitist institutions targeting a small portion of school-age children, U.S. high schools became inclusive institutions that sought to accommodate large segments of students interested in both academic and vocational studies (Cummings, 1997).

Although comprehensive schooling "softened" the sharp distinction between academic and vocational studies by transforming between-school hierarchies into intra-school ones, it did not eliminate it entirely. Vocational programs in the United States, directed at pupils of lower socioeconomic status who had difficulties performing in academic programs, continued to bear the stigma of a "second class" education. Although comprehensive high schools contributed to the unprecedented growth of secondary education in the United States by offering more diverse courses to heterogeneous populations, they continued to act as powerful mechanisms of social stratification (Kerckhoff, 1995). Overall, secondary education in the United States confronted a much weaker elitist tradition and considerably less intellectual

opposition to vocational education than in England. The comprehensive high school reflected a pragmatic, instrumental view of education in which vocational subject matter could be easily integrated in an ever-expanding array of course offerings.

Secondary Education Reform in Postwar Europe

In the aftermath of World War II, European states needed to reconstruct not only their economies and polities, but also their education systems. American involvement in European reconstruction via massive aid programs in the Marshall Plan and through its growing influence in international organizations, mainly UNESCO and OECD, provided an auspicious context for spreading U.S.-based educational principles (e.g., equality of educational opportunity, expanded secondary education) and models of schooling (e.g., comprehensive high schools). The growing predominance of U.S. social science communities, in which leading scholars extolled the virtues of human capital and modernization theories that linked education and economic growth, also impacted educational reforms in Europe. A dearth of scientific and technological education incited Western European education systems to promote programs in these areas, especially following the Sputnik affair in 1957.

The above conditions, together with an activist political leadership, resulted in the passage of substantial educational reforms, which sought to foster more egalitarian, more comprehensive, and less hierarchical secondary education systems. Although the timing, scope, and implementation of these reforms varied from country to country, the following elements were integrated (in some form or another) into most educational initiatives:

• A prolongation of compulsory education into secondary education;
• Attempts to blur the hierarchy between academic and non-academic studies (art, informatics, dance, etc.) by greater diversification of subject offerings;
• A tendency towards establishing comprehensive secondary schools; and
• An increase of science-oriented studies at all educational levels and in most programs of study.

In addition, there were concerted attempts to sustain and improve vocational education. Vocational education was transformed into vocational education and training (VET) with the addition of new training programs that emphasized modern skills and competencies. In some countries, improvements to VET occurred at the upper-secondary level, in others, at the post-secondary level. In almost all cases, VET programs increased their emphasis on general education subjects and reduced restrictions for graduates who wanted to enter post-secondary institutions. Expanding education in general, and retooling VET programs in particular, tapped into deeply held convictions that such policies would meet the demand for moderately and highly skilled employees in European labor markets and would help sustain economic growth (Resnik, 2001).

Overall, three basic patterns of vocational and technical education emerged in Western Europe:

- After completing full-time compulsory education, pupils receive instruction in a specific craft from the age of 11 or 12 (e.g., Netherlands and Belgium, in the past).[11]
- After completing full-time compulsory education, pupils are provided with compulsory part-time vocational education (e.g., the *Berufsschule* in Germany and Switzerland).
- Pupils study in general education frameworks until 15 or 16, after which they take courses specifically directed towards the acquisition of qualifications needed for a chosen career (e.g. France, Italy, Sweden, and the United Kingdom).

Differences in European education and training systems derived from the historical traditions of national structures, practices, and institutional cultures (Green, 1997: 178). Patterns of vocational education and training resulted specifically from the inter-relationship of national labor market structures and education systems (Ashton and Green, 1996). Some convergence in European secondary education systems became apparent as almost all countries established three types of secondary programs: a general or academic program, a broadly vocational or technical program, and a vocational program that prepared students for particular occupations (Green, Wolf, and Leney, 1999).

Such secondary school divisions have led to stratification. (Due to space and time restrictions, we have defined these as outside the bounds of the present article.) Research has demonstrated that access to differentiated secondary-level programs in Europe and elsewhere is correlated with students' origins (Blossfeld and Shavit, 1993). Children from minority and immigrant groups are often channeled to vocational tracks and schools. Examples of this include Moroccan and Algerian students in France, Turkish students in Germany, Pakistani and Indian pupils in Britain, Indonesians in the Netherlands, and Muslims in Canada (Eldering, 1996; Zine, 2001).

In recent decades, intensifying global economic competition has further strengthened the official view that education and training are critical factors in increasing economic performance and competitive advantage (Green, 1997: 173). Because they are unable to compete with the significantly lower wage levels of many jobs in less-developed countries, European states have instead concentrated on value-added, knowledge-based production and services, which necessitate higher-level skills and extensive worker flexibility (Finegold and Soskice, 1988, cited in Green, 1997: 182). Many countries have undertaken strategies to strengthen vocational education, especially work-based programs leading to certification that involve contextualized learning in firms (Lerman, 2001). Spain recently implemented a new VET policy

11. In recent years, the Netherlands and Belgium have extended compulsory education to ages 17–18 and have adopted a system that approximates the second pattern listed (IBE, 2003).

(Bonal, 2001), and Sweden initiated a new tertiary-level VET policy during the 1990s (Lindell, 2004). The British government promoted a "Skills Revolution" (Pring, 2004) within the framework of new vocational education and training programs (Avis, 2004), while the Netherlands increased the status of work-based learning (van de Stege, 2003). In addition to VET, all governments have advanced policies to extend individual learning and skill enhancement beyond secondary education through various forms of lifelong learning and adult education, which are based in communities, workplaces, or the academy (Green, 1997: 177).

Vocational Education in the Postcolonial States

The vocational versus general education controversy in African countries and other postcolonial states can be traced back to the colonial period. The main objectives of education supplied by colonial governments were twofold: first, to provide educational services of high standards to expatriates' children; and second, to train local elites to fill administrative, commercial, and teaching jobs in colonial administrations (Kelly and Altbach, 1978). By and large, colonial schools closely mirrored their counterparts in Europe—bookish, academic, and designed to prepare pupils for rigorous examinations. Native populations in European colonies were taught basic skills (i.e., reading, writing, and arithmetic) in mission schools or government-aided village schools. In some instances, schools provided instruction in practical or technical skills, typically farming and crafts production (Fafunwa, 1982).

Influential reports seeking to reform education in European colonies began circulating after World War I. The Phelps-Stokes Fund, representing the interests of several British and American missionary bodies, appointed a group called the African Education Commission (AEC) to tour Africa and make recommendations for the improvement of mission-based education. In 1922, the same year that Lord Lugard published his statements on indirect rule, the AEC published a plan to reform African education, recommending that it be adapted to "community needs." Because African economies were predominantly agricultural, the AEC reasoned, school curricula should emphasize the dignity, importance, and skills associated with agricultural labor.[12]

The British Colonial Office, persuaded by many AEC recommendations, commissioned its own policy reports, the first of which was published by the Advisory Committee on African Education in 1925 (Mayhew, 1938). This report maintained that "education should be adapted to the mentality, aptitudes, occupations and traditions of the various peoples, conserving as far as possible all sound and healthy elements in the fabric of their social life." The adaptation of education—more practical, vocational, and suited to native

12. According to the AEC plan, the education of native Africans would also entail a strong cultural element: it should seek to civilize them (convince them to abstain from "barbaric" indigenous practices) while sustaining the distinction between European and African cultures. In the words of the AEC, education should combine "the self-confidence of culture with the simplicity of Africans."

needs—would mitigate the destabilizing impact of social and economic changes to traditional life under European colonialism. Subsequent reports underscored the need to expand educational opportunities and also reiterated the importance of adapting the structure and content of government-aided schools to local realities (Fafunwa, 1982; Bray et al., 1986). In Asia, too, initial efforts towards vocational education were introduced during the first half of the twentieth century (Tillak, 2002).

After World War II, many national leaders in newly independent countries advanced arguments in favor of vocational education. Leaders in India, China, Tanzania, and Ghana, to name but a few, called for the diversification of school curricula and establishment of vocational education programs as means to enhance agricultural production, stem migration to urban areas, curb the number of unemployed school leavers, and transform work-related attitudes among youth.

Institutional support for vocational and technical education also gained momentum. The Addis Ababa Plan for African Educational Development, adopted in 1961, emphasized the need to orient secondary education to economic and technological development, which required a shift in enrollments from general education to vocational and technical education (Maté, 1969). UNESCO (1974; 1979a) and other intergovernmental organizations endorsed similar recommendations, as a 1979 UNESCO statement exemplifies: "technical and vocational education is a prerequisite for sustaining the complex structure of modern civilization and economic and social development…the rapid technological and educational changes of the last decade require new, creative, and efficient efforts in technical and vocational education to improve education as a whole for social, economic and cultural development" (1979a). An influential World Bank sector policy paper on education characterized school curricula as excessively theoretical and abstract, weakly tied to local conditions, and insufficiently concerned with developing skills for, and positive attitudes towards, manual work (World Bank, 1974). The notion that vocational education could help overcome shortages in skilled manpower, enhance productivity, and contribute to economic growth diffused rapidly to developing countries through regional conferences and special commissions (Gimeno, 1981; Parmers, 1962; Porter, 1970).

Beginning in the 1960s, international agencies targeted vocational education and training for substantial institutional funding. At the time, the World Bank was the largest source of international financial support for VET and invested substantial sums in projects involving vocational and diversified secondary schools (see Table 3). While the percentage of VET funds allocated to secondary-level programs declined between 1963–76 and 1977–88 (dropping from 54 percent to 20 percent), the absolute amount of investments between these two periods increased. (A growing interest in non-formal education involved programs to enable out-of-school youth to acquire vocational or technical skills applicable for formal wage employment or self-employment). Overall, with generous international financing and widespread belief in the economic legitimacy of VET, many Asian, African, and Latin American coun-

Table 3: World Bank Investments in Vocational and Technical Education and Training, 1963–1988

Period	1963–1976	1977–1988
Total amount invested (in constant millions U.S. dollars)	969	4399
Average yearly amount invested (in constant millions U.S. dollars)	69.2	366.6
Target of VET Investment (%)	100	100
Secondary diversified schools	28	2
Secondary vocational schools	26	18
Postsecondary vocational schools	21	24
Non-formal education	26	56

Source: Adapted from World Bank (1991), p. 66.

tries initiated prevocational, vocational, and technical education or training programs in the 1960s and 1970s.

Nevertheless, disappointment and disillusion over vocational education outcomes proliferated (Chapman and Windham, 1985; Wong, 1973: 36–40; Psacharopoulus and Loxley, 1985; Psacharopoulos, 1987). Many critiques of VET programs in postcolonial states recalled themes first articulated by Foster (1965) in his seminal work on the "vocational school fallacy." Foster maintains that academic schools in Ghana were actually perceived as vocational because they led to the most desirable jobs in the modern sector (e.g., clerical jobs, government positions). Vocational education, he argues, was likely regarded as inferior because it was orientated towards less attractive vocations. In addition, vocational training, especially when directed towards wage employment, would not by itself produce jobs. Although it might redistribute who gets existing jobs and eventually contribute to increased productivity and employment opportunities, without changes in labor market conditions, benefits of vocational training were unlikely. Beginning in the late 1970s, internal evaluations of projects supported by the World Bank highlighted the acute problems engendered by diversifying curricula and supporting vocational education: VET programs necessitated high capital and operating costs; low salaries made it difficult to recruit qualified teachers; prevocational courses in diversified schools were under-enrolled due to "cultural biases" against technical subjects; many technical and diversified school graduates postponed entering the labor market and instead entered tertiary-level institutions; among those who entered the labor market, many were unable to find jobs in their fields of training; links between VET programs and community or business needs were often inappropriate or nonexistent; and many VET curricula were poorly designed (World Bank, 1991: 71ff). As a result, the World Bank increased educational investments in primary education and general secondary education and simultaneously reconfigured its support for VET

projects to those that were increasingly privatized, concentrated at the post-secondary level, and more closely linked to specific industrial sectors and skill demands (World Bank, 1991). Since the 1970s, and more intensively during the past decade, UNESCO has also actively promoted technical and vocational education, through initiatives such as the International Project on Technical and Vocational Education (UNEVOC), various reports and international meetings[13] and the establishment of an International Center in Bonn (2000).

The controversy over vocational education and training—whether it should be conceived as curricular diversification in general secondary schools, as separate schools training students for labor market positions, as a broad educational strategy to inculcate job-relevant or life-related skills among young people, or as non-formal frameworks providing status-enhancing skills to out-of-school youth—continues unabated (Lillis and Hogan, 1983; Psacharopoulos, 1987, 1990; Gill et al., 2000). Social scientists have raised difficult questions about the effectiveness and efficiency of VET programs in developing countries: Can national policy makers accurately predict changing labor market structures, manpower requirements, and occupational skill demands in order to tighten the links between educational programs and labor markets? Can relevant VET curricula be designed and can qualified teachers be trained and employed? Can the governments of developing countries afford the higher costs and outlays associated with VET programs, especially under conditions of austerity? Do employers actually prefer VET graduates to general education graduates? Can educational programs, by themselves, alter economic structures and patterns of unemployment or underemployment? Based on findings from accumulated research conducted over recent decades, there is little evidence of unequivocal, affirmative responses to these questions (see Lewin, 1993; Tillak, 2002). In the wake of many failed VET reforms, the relative effectiveness of VET programs seems to depend on relatively scarce and highly contingent conditions being met, such as a country's level of development, clear linkages with existing labor markets, institutional configurations of the national education system, the quality of teacher training, and employer preferences.

Furthermore, as previously discussed, the bias towards academic studies and the perception that vocational education entails an inferior, "second-class" education have deep historical roots in postcolonial states. The introduction of formal school structures during the colonial period significantly affected social-class formation, conceptions of "modernization," and definitions of what counts as valid knowledge and, consequently, valid schooling (Lillis and Hogan, 1983). In many settings, colonial experiences created strong biases and negative attitudes towards vocational education (Beckford, 1972; Abdulah, 198l; Rabo, 1986). Although elite secondary education seemed to contradict the populist, democratic spirit of newly independent nations,

13. In Seoul, Korea, the Second International Congress on Technical and Vocational Education was held in 1999. In Moscow, Russia, An Expert Meeting on Information and Communication Technologies in Technical and Vocational Education and Training was held in 2002.

many older elites who had been educated in colonial systems viewed the vocationalization of secondary education as eroding academic standards (Sutton, 1965: 75). In addition, those in power were disinclined to dismantle education systems that privileged their children's achievements and futures (Heyneman, 1971). Although government functionaries may have been willing to pay lip service to practical skill training or revitalized agricultural education, they continued to support regressive policies favoring higher education. This orientation towards the elite resulted in persistent educational inequalities (Gauhar, 1981; Khan, 1981).

Formative historical experiences molded public conceptions of appropriate or inappropriate education. For example, Caribbean countries were overwhelmingly partial to a grammar-school-type education and correspondingly averse to technical education, reflecting attitudes consistent with their British heritage and related to their slavery experience (Lewis and Lewis, 1985: 35). Only when the public (especially parents) became critical of the high failure rates of children in the traditional academic curriculum did some governments initiate programmatic changes to secondary education (Lewis and Lewis, 1985). Vocational-school leavers expected to gain access to more highly-skilled positions in the labor market. When governments' manpower forecasts went unrealized, support for VET programs eroded and interest in academic programs, which seemed a more promising road to stable wage employment, increased. Indeed, the fact that VET programs rarely altered existing employment structures explains in part the qualified and shifting support they received.

In sum, despite the vocational-school fallacy and the many problems associated with VET programs, national and international interest in vocational education remains quite strong. Policies favoring some form of vocationalization have a simple, intuitive logic to them, and they continue to garner financial support—albeit more narrowly targeted—by donor organizations and host governments (World Bank, 1991; Gill et al., 2000). Over the course of the twentieth century, visions of vocational education have invented and re-invented themselves on numerous occasions. They continue to imbue international policy discussions, particularly those that consider the transformation of secondary school systems in less-developed countries (World Bank, 2005). Under very specific economic and institutional conditions, some VET programs became an integral feature of formal secondary schooling. The historical evidence suggests, however, that such programs are being radically transformed. They are less frequently organized around particular jobs and vocations and more often around different types of skill training, increasingly anchored at the upper- and post-secondary levels, increasingly funded by private sources and conducted outside the public education system, and increasingly defined as in-career, rather than pre-career, training. More so than other forms of schooling, cultural orientations and historical legacies have played, and continue to play, a significant role in determining the legitimacy and place of vocational education in postcolonial states.

The Experience of Communist Countries

Unlike most western countries, where major educational transitions resulted from complex and drawn-out historical processes, communist countries often imposed decisive educational reforms in the wake of successful regime change. Newly established socialist governments—including the Soviet Union during the 1920s, China from the late 1950s to the mid-1970s, and Cuba from 1960 to the early 1970s—were deeply committed to educational expansion as well as the promotion of adult literacy through mass campaigns (Bhola, 1984; Arnove and Graff, 1987). Revolutionary leaders "attributed great importance to education as part of the means of achieving social transformation" (Carnoy and Samoff, 1990: 7).

Each of these regimes established new educational frameworks intended to blur the traditional hierarchy between academic and professional studies as well as the separation between school life and the work world. Soviet "factory-run schools and school-run factories" and Chinese work-study programs that encouraged individuals to "work every day and study every day" exemplified the integration of education and labor. In Cuba, academic studies became more utilitarian in character. China highlighted science and technology subjects, especially their application outside the classroom, often carrying out lessons at factories and farm sites (Cheng and Manning, 2003). The polytechnical model, established in the late 1950s and 1960s in the Soviet Union and Eastern Europe, forged new links between school and work by integrating general and vocational education at a national level. At the upper-secondary level, schools sought to strike a balance between theoretical knowledge and practical training in production (UNESCO, 1961: 139–140).

Many of these educational reforms were abruptly reversed in the wake of unmet economic goals and objectives. In the 1930s, the Soviet Union passed a series of decrees that restored aspects of the previous system with the aim of more effectively training technicians, engineers, and administrators. After Mao's death in 1976, Chinese leaders reintroduced college admission examinations and reestablished "key [elite] schools" in every province and city. In Cuba in 1970, weak levels of sugar production—a major economic target of the revolution—led Castro to launch educational reforms stressing grades, discipline, and promotion, thereby undercutting previous initiatives to integrate work and study. In the early 1980s, the establishment of a new elite school system called the School for Exact Sciences launched Cuba's "battle for quality" (Cheng and Manning, 2003). Although leaders abandoned many ambitious educational experiments, communist education systems continued to be inspired by egalitarian ideals and to emphasize technological and scientific study.

Cuba is considered an especially successful example of educational transformation under socialism. According to Padula and Smith, "the revolutionary reforms of Cuban education from 1959–1987…rank as one of the more extraordinary efforts in the history of education" (1988: 135). Education and educational change became a symbol of the revolution itself; mass education became

a means of economic participation and mobilization (Carnoy 1990: 171). Cuba's impressive educational achievements include: universal school enrollment and attendance; comprehensive early childhood education and student health programs; equality of basic educational opportunity, both rural and urban and even in impoverished areas; extensive pre- and in-service training of teachers, who also enjoy relatively high professional status; near-universal adult literacy; expanded non-formal programs for out-of-school youth and adults; and a strong scientific training base (Gasparini, 2000).

Discussion of Cuban educational reform should be framed by two main factors that contributed to its success: the positive influence of certain pre-revolutionary conditions such as relatively high adult literacy rates and a well-organized and educated labor force; and the comprehensive manner in which authorities confronted educational and non-educational problems. Specifically, initiatives sought simultaneously to substantially reduce poverty (Berube, 1984), eliminate adult illiteracy, improve children's health care, increase access to primary and lower-secondary education, raise teachers' status, involve parents and community leaders in school affairs, and bring about important curricular reforms. In addition, community motivation remained strong and was nourished constantly by the politics of mass mobilization.

Recent comparative analyses of mathematics and language achievement among Latin American pupils illustrate the strong performance of Cuban pupils (Willms and Somers, 2001; Carnoy and Marshall, 2005). Indeed, many of Cuba's schools perform at levels similar to those of OECD countries (Gasparini, 2000).

In addition to the aforementioned factors, many scholars discuss how Cuba's state structures and politics have contributed to the outstanding results of its educational system (Carnoy, 1990; Torres, 1991; Carnoy and Marshall, 2005). First, the highly structured educational system depends on a centralized educational administration, which sets national educational policies. Indeed, much political decision making in Cuba is personalistic. Second, the continuity of education strategies has benefited from the stability of political policies over several decades. Third, levels of investment in education have remained high, even during periods of severe resource constraint (Gasparini, 2000). Lastly, community participation in school management has been encouraged, as have parent and student involvement in curriculum reform. Although it is unlikely to be replicated in full, many aspects of Cuba's educational revolution should be carefully considered by other countries that are working to expand and improve their educational systems (MacDonald, 1985).

Conclusion

Concern for equality and equity was not an integral part of the early evolution of national education systems. For centuries, elite education was the norm. Debate in most of Europe and North America initially revolved around the educability of the children of the masses and whether they should be incorporated as citizens in the nascent nation-state through their participation in public schooling. Only in the late nineteenth and early twentieth cen-

turies did the discourse shift from a question of exclusion and inclusion, to a question of the terms of inclusion. In other words, although it was generally accepted that all children should be educated, the debate was over how much schooling, at what ages, and with what objectives and contents in mind (Ramirez, 2003). Even as discourses changed slowly and unevenly, educational realities lagged further behind.

In European colonies and postcolonial states, the issue of whether all children are educable, or need be educated, remained salient well into the twentieth century. In this sense, the educational principles discussed at the International Conferences on Public Education during the inter-War period (Magnin, 2002) and later institutionalized in the UN's Universal Declaration of Human Rights (1948) represented dramatic turning points for children living in dependent territories and former colonies. The idea of free and universal primary education, however elusive its implementation may have been in practice, effectively placed all children of school age into a single category of comparison, in which measures of educational inequalities could be constructed, evaluated, and transformed into objects of policy reform.

As we have seen, secondary education was historically limited in coverage, relatively uniform in structure, and academic in content. Calls to open secondary schools to children from less-privileged backgrounds, and to diversify its traditional purposes, invoked different principles and confronted different realities around the world. The high-status knowledge and elite cultural codes associated with academic secondary schools were deeply ingrained in European history, less so in North America. Many Europeans believed that children of popular origin were incapable of meeting the difficult challenges of academic studies in grammar schools, lycées, and gymnasiums. Expanding access to secondary education meant lowering academic standards. Critics cited the less-than-rigorous demands of American high schools and colleges, in contrast to European ones, as the price of mass secondary education (Resnik, 2001). Moreover, industrial economies demanded more scientists, technicians, and skilled workers. Policies expanding vocational and technological education, on the one hand, and increasing the scientific and technological content of general education, on the other, more effectively addressed the alarming lack of such workers. Thus, to the extent that countries championed policies to increase access to secondary education, they typically advanced these policies within a hierarchical framework of stratified schools and programs of study.

The principle of equality of opportunity and the democratization of secondary education slowly gained momentum in postwar Europe. With high economic growth rates and relatively activist regimes, many European governments inaugurated radical reforms in secondary education: reconfiguring selection criteria, extending compulsory education, establishing clearer markers between lower- and upper-secondary education, transforming vocational education, diversifying curricula, and expanding comprehensive schools. As we have discussed, the evolution towards more democratic secondary education systems involved complex interactions of technological changes, political

cultures, educational standards, and cultural and social traditions. In newly independent states, intergovernmental organizations and Western experts played an important role in fostering these new conceptions of education.

By the late 1970s, visions of a more democratic and egalitarian secondary-school sector began to fade. The energy crisis and economic stagnation left egalitarian targets unfulfilled. Notions of equity—a justice-laden concept—began to replace those of equality in educational discourse. Equity-based analyses sought to understand why, despite the seemingly good intentions of educators and planners, education systems continued to produce disappointing results. Equity discourse in Western countries conceptualized and engendered new target groups, such as immigrant children, marginalized populations, and disabled pupils. In international organizations, this discourse addressed indigenous peoples, rural populations, minority groups, and, especially, girls (Chabbott, 2003: 57).

From the mid-1980s, an economic world-competition discourse gradually replaced the economic growth discourse. Shifts in economic and demographic conditions yielded new challenges for education systems in more-developed and less-developed countries alike. There was a pressing need to increase general educational levels in the population, to improve vocational education and skill training, and to provide a solid basis for lifelong learning. Recommendations addressing these challenges were coupled with strategies to reduce education costs, improve efficiency, increase private sector intervention, and decentralize educational governance. As education was increasingly linked to global production needs and the activities of the private sector, many contended that the neoliberal discourse of the New Right had become the dominant model (Kallaway, 1989). Policies endorsed by the World Bank sought to advance these principles without contradicting equity principles. Actions to improve skills training (e.g., macroeconomic strategies, more effective and efficient private sector training, improvements to public skill training) were expected to address equity objectives for the poor and the socially disadvantaged (World Bank, 1991: 17–21). In sum, this new valorizing concept of manual skills permitted the bridging of demands for universal secondary education, more diversified secondary education serving increasingly heterogeneous populations, and the perceived economic imperatives that justify vocational and technical education (Resnik, 2001).

INTERNATIONAL ORGANIZATIONS AND THE INSTITUTIONALIZATION OF THE GLOBAL EDUCATION SYSTEM

Our comparative analytical history of mass schooling has highlighted the influence of transnational and international processes. We contend that the circulation and emulation of foreign educational models are not recent inventions. Rather, what has changed over time is the nature of educational knowledge being discussed and transferred.

The observation and selective borrowing of foreign educational practices has been an integral part of the movement towards compulsory mass educa-

tion. Scholars interested in new pedagogical approaches, such as that of Pestalozzi (1746–1827), traveled considerable distances to study emergent practices in the eighteenth century. Foreign advisers and educational experts, who served as emissaries of their national governments, came to study the Prussian education system in order to transfer educational knowledge to their countries (Noah and Eckstein, 1969; Cummings, 1980, 1997). From 1830–1850, prominent Americans such as C. Woodbridge and Horace Mann traveled to Western Europe to observe and compare school organization and educational frameworks (Knight, 1955; Fraser, 1969: 1–17). After World War I, John Dewey wrote extensive surveys on prominent educational approaches and practices in Soviet Russia, China, Mexico, and Turkey (Dewey, 1964).

The advent of governmental statistical offices in Europe and North America during the nineteenth century (Desrosières, 1998) contributed to the circulation of more thorough accounts of foreign educational frameworks and heralded the emergence of a world education system (Schriewer, 2000) or world culture (Chabbott, 2003), which expanded rapidly in the twentieth century. Although some studies dealing with education had been carried out by the International Labour Organization prior to the founding of the IBE in 1925, the IBE sought to transform children's education into a scientific field (Magnin, 2002). Beginning in the 1930s, the IBE-sponsored International Conference on [Public] Education brought together leading education proponents and senior officials of ministries of education from around the world. The recommendations of this international forum, which both symbolized and contributed to the growing global education system, "…constitute[d] a kind of international charter or code of public education, a body of educational doctrine of very wide scope and importance" (from the IBE website, accessed June 2003).

Undoubtedly, the establishment of UNESCO after World War II proved to be the most important turning point in the development of this global system (Meyer and Ramirez, 2000; Chabbott, 2003). In addition to its legitimacy as part of the UN system, UNESCO's burgeoning educational agenda was instilled with an unprecedented universalistic moral authority. Education systems around the world came to be considered part of an all-encompassing global framework in which individual units could examine and adapt "proven" or promising educational practices. Beginning in the 1950s, UNESCO launched comparative educational reports, international meetings, and policy declarations, which invested it with further international authority and caused many member states to seriously consider and subsequently apply its recommendations. In addition to UNESCO, intergovernmental organizations such as the World Bank and OECD became salient channels for the global diffusion of Western standards and educational models through their research reports, policy statements, and project funding. The activities of these organizations resulted in the greater uniformity of educational accounts, a process that has intensified over time (Resnik, 2006b).

The attractiveness of the American educational model also contributed to the adoption of standardized educational recommendations in many interna-

tional organizations in two significant ways. First, in the aftermath of World War II, the United States emerged as the triumphant superpower and took the lead in a range of economic, political, and cultural arenas. The Allies' victory brought attention to American educational structures and practices, as well as their presumed high technological standards. European scholars were encouraged to travel to U.S. universities in order to absorb ideas from the "New World." Many countries became interested in imitating certain aspects of the American system and in becoming part of global educational networks in which the United States was a central actor (see Paulston, 1968: 100; Hoffman, 1997). Second, the United States was deeply involved in European reconstruction through aid programs, notably the Marshall Plan, and the circulation of professional experts. In the early years after the establishment of UNESCO, Americans held many high-status jobs in the organization. They shaped UNESCO's visions, objectives, and work methods and exposed European leaders cooperating in international organizations (mainly UNESCO, the World Bank, and OECD) to the democratic, egalitarian, and utilitarian worldview dominant in the United States (Pendergast, 1974: 171).

The formation of a global education system and the uniformization of education systems should not be attributed exclusively to pro-U.S. tendencies and American leadership in international organizations. During the First Development Decade (1950–1960) and the Second Development Decade (1960–1970) an "education for development" discourse was constructed in international organizations (Chabbott, 2003: 42–5). The adoption of this "education–economic growth" black box (to use Latour's 1987 term) in international organizations legitimized the empowerment and enlargement of its education departments (Resnik, 2006b). From the late 1950s until the early 1970s, economic growth and modernization theory held the arena and influenced the much of the development thinking of international aid agencies in Europe and North America (Watson, 1984a: 1). Once the United Nations embraced the notion that education is a key factor to economic growth, the idea rapidly gained popularity in international forums and among international policy analysts. The "education–economic growth" black box was perceived as an effective means to accomplish the primary aims of the OECD and UNESCO — that is, to promote the coordination of states, international comparisons, and the global interchange of information among member states. Departments of education in international organizations expanded and their staffs advised and coordinated immense international agendas in both more- and less-developed countries. Member states were expected to increase their educational budgets and were mandated to improve the educational levels of the population. Attempts to realize all these resolutions and recommendations led to the creation of an "education–economic growth" global network (Resnik, 2006b).

The worldwide network encompassed a long list of researchers, economists of education, and planning experts, and recruitment of these individuals intensified. The number of functionaries dealing with educational issues increased considerably in most countries. The global network included many

institutions: departments of educational statistics and of educational planning were established in many countries; study groups on education and economic development were organized by UNESCO and OECD; international institutes for promoting education were founded (such as UNESCO's Institute of Education and the International Institute of Educational Planning [IIEP]) or renewed (such as the IBE); comparative scientific educational journals proliferated; and international education forums, such as the IEA (International Association for the Evaluation of Educational Achievement) were founded. This world educational apparatus, in which education units within international organizations were central actors, launched a global campaign imposing Western educational models, in both Europe and in developing countries (Resnik, 2006b).

The faith in economic growth resulting from educational expansion began to fade in the early 1970s (Weiler, 1978; Blakemore and Cooksey, 1981: 281; Fry, 1981). Nevertheless, the adoption of the "education–economic growth" black box in the 1960s had already resulted in a remarkable expansion of education systems through the world. More important, it resulted in the establishment of a global educational apparatus which included, among other things, comparative education reviews and institutions, planning institutions, national institutes of statistics, newly created educational research centers, and partnerships with social sciences and educational sciences at the universities. As the density of interactions among these entities grew, so too did the standardization of global education descriptions. The uniformization of the global education discourse influenced educational planning, and transformed educational sciences into comparative and applied sciences (Resnik, 2006a). Thus, the global education apparatus developed around techniques of standardized statistics, planning, educational applied research, and comparative education. As Daston claims, "statistics do not just describe the world, they change it" (2000: 35). In the 1970s, the ideals of the "education–economic growth" black box, which had propelled the construction of this enormous educational machine, began to vanish, but the global education system was already widely recognized and institutionalized.

The 1950s and the 1960s were conceived as the golden age of education (Papadopulous, 1994: 37). But, in the mid-1970s, the educational discourse in international agencies began to change as a result of economic problems caused by the energy crisis. Reductions in educational expenditures forced developed countries to manage their resources more efficiently and effectively. These countries developed new indices to monitor their education systems and reduce costs. Donor countries were less eager to collaborate with costly development projects. In less-developed countries, this resulted in cutoffs of international educational funding and in recommendations from international agencies to apply efficiency and effectiveness norms to their educational administrations. Moreover, in the 1980s, the debts crisis and the introduction of World Bank and IMF Structural Adjustment programs forced indebted developing countries to reduce their expenditures in education. Decentralization and local educational governance became keystones of international

discourse, mainly in the World Bank, as a way to grapple with bloated and inefficient central administrations and to encourage greater community financing of local schools (Kiernan, 2000; Chabbott, 2003: 56). Renewed faith in market forces, skepticism about state efficiency in providing social services, and the search for strategies that would enlarge local control and financing led many donor institutions to favor NGOs as social service delivery agents, increasing NGO participation in educational projects (Chabbott, 2003: 46). In the 1990s, the introduction of the Human Development Index renewed interest in "human resources development," emphasizing the need to increase the participation of girls and minority children in the education system (Chabbott, 2003: 56–57).

In some international organizations, the drive for educational expansion languished over time. As Chabbott (2003: 62) notes, international discourse in the last decade of the twentieth century increasingly privileged individual welfare over national growth as the more appropriate measure of development. In other organizations, notably the World Bank, where investments in educational projects grew, faith in education was transformed. No longer simply an engine of economic growth, education became a means of reducing poverty and promoting sustainable development. At UNESCO, where notions of education as a fundamental human right dominated, ambitious large-scale programs to enhance all forms of education were undertaken. The Education for All (EFA) movement, initially launched by UNESCO and other international organizations during the World Education Conference in Jomtien (Thailand) in 1990, placed basic education high on the development agenda. A decade later in Dakar (Senegal), representatives from over 160 countries and NGOs reaffirmed their commitment to EFA, and generated a more detailed set of goals, actions, and monitoring mechanisms for achieving educational targets over the coming decades.

In summary, international discourse on education, in both governmental and nongovernmental organizations, changed substantially over the past four decades. During the 1960s and 1970s, Education for All, Universal Primary Education (UPE), Compulsory and Free Education, and Education for Self Reliance became the rallying cries for governments and donors alike. The World Bank initially emphasized the needs of tertiary education and later highlighted projects that vocationalized secondary education. In the 1970s, the Basic Needs philosophy affected the way in which educational projects and reforms were perceived, while in the 1980s, the Structural Adjustment Programs (SAPs) became the frame through which donor investments in education were evaluated (Kiernan, 2000). The notion of economic growth transformed into economic development; concepts like the "pool of abilities" or equality of oppportunity virtually disappeared from international discourse. The education of minority groups, the cultural rights of aborigines, gender equality and parity, and the emergence of the all-encompassing knowledge society became new themes in international policy papers. Earlier educational recommendations morphed into newer ones—almost all became integrated into world educational culture. Unchanged, however, was the

power to initiate, diffuse, and adapt educational discourses, which remained unequal. The adoption of education recommendations, typically formulated in the developed world for international circulation, strongly revolved around national and local considerations in more-industrialized countries. In less-developed countries, by contrast, national contingencies and local conditions took a back seat to the prospect of international aid, thereby reducing degrees of political freedom in adapting recommended reforms.

WHAT CAN BE LEARNED FROM A COMPARATIVE SOCIO-HISTORICAL ANALYSIS OF UNIVERSAL EDUCATION?

The historical development of universal basic education was an uneven and highly contingent process.

The development of universal basic education—compulsory, systemic, integrated, inclusive, diversified, and attuned to discourses advanced by international agencies—was an uneven and highly contingent historical process. This is a major point arising from the comparative socio-historical analysis undertaken in this paper. The evolution of public systems of primary and secondary schools depended, in different times and places, on changing configurations of local, national, regional, and global conditions. In Europe and North America, state structures and processes of state formation profoundly affected educational expansion and systemization. Late industrializers often linked educational expansion to economic and technological development, and moved more quickly to develop vocational-education frameworks for children destined for positions in industry and manufacturing. In societies with weak aristocratic traditions and less elitist cultural conceptions, there were more determined efforts to prolong compulsory schooling and to expand and diversify secondary education. Compulsory mass schooling emerged from diverse social, economic, and political conditions. In some cases, it invoked nation-building processes and new conceptions of citizenship; in others, it was informed by long-standing conflicts with powerful religious authorities and by social movements supporting secularization; and in still others, it served to weaken the pervasiveness of child labor and gender discrimination.

In Asia, Africa, and Latin America, indigenous educational forms had important historical consequences, not only during the period of European imperialism, but also following political independence. The structures, principles, and practices predominating in colonial and missionary schools also left indelible marks on mass education in postcolonial states. Indigenous cultural authorities and foreign actors stimulated distinctive historical legacies, from the varying predominance of ideologies of educational exclusion to the passage and enforcement of educational ordinances, from the strategies used to address religious and private schools to those used to reform of secondary education. Furthermore, transnational and international forces profoundly influenced the development of universal education in newly independent

countries. More so than in Europe and North America, in which selective (but limited) cultural borrowing took place, intergovernmental organizations not only circulated prevailing educational models, but also pressured national elites to adopt them. Crucial changes to mass education in these regions depended, in no small measure, on such exogenous forces.

Comparative historical scholarship of the emergence, systemization, and expansion of universal education remains underdeveloped and downplays the diverse origins and meanings of mass schooling.

Even within the narrow confines of the issues addressed in this paper, there is an acute need for existing social scientific scholarship to reconsider and reevaluate existing studies of the origins and development of mass education. The overemphasis on comparative (usually quantitative) studies of enrollment expansion and isomorphic tendencies has resulted in scholars ignoring or downgrading other aspects of the historical institutionalization of universal education, which is much more diverse and heterogeneous in nature than typically characterized. It is time for comparative researchers to admit longstanding biases in what has (and has not) been studied and to launch new comparative historical studies of mass education, which would extend and enrich the conceptual models that have become accepted truths.

The models, policies, and recommendations of international actors and organizations were de-contextualized from their historical roots.

Another key point to emerge from the comparative analyses in this paper concerns the problematic flow of Western educational models and practices across space and time. Educational structures in the West resulted from historically diverse national conditions and extensive political debates. In contrast, policies and practices prescribed by transnational agents for developing countries showed relative uniformity and little adaptation to local contexts. Transnational agents often presented these policies as quick solutions to pressing social and economic problems. The educational models flowing to postcolonial states were, by their very nature, de-contextualized. Because these models relied upon research findings framed within Western *problematiques* and embedded in the institutional configurations of dominant education systems, they lacked an in-depth understanding of the contexts in which they were proffered and transplanted. As Foster (1977) notes, concepts such as social stratification, created to analyze patterns in Western societies, can be misleading if applied uncritically to the non-Western world. Or as Hirschman (1968) points out, modernization theorists institutionalized a model of the development process that was divorced from history and the distinctive features of particular nation-states. Indeed, international educational policies and reforms are rarely grounded in historical configurations.

The longstanding controversy over academic (general) versus vocational (technical) secondary education aptly illustrates the problem of de-contextualization created when exogenous educational models are applied to less-developed countries. In case after case, government initiatives and support

for vocational education and training overlooked generic problems and basic fallacies related to the vocational education–employment nexus. These problems included critical public perceptions, poorly trained teachers, outdated facilities, few student incentives, and a paucity of data on actual or future manpower needs (Chapman and Windham, 1985). Vocationalization policies encapsulated a seemingly intuitive logic, which made them attractive to both donor organizations and host governments. Although research indicated that the success of VET was highly context-dependent, it continued to be circulated as a legitimate and attractive policy alternative within a simplified, de-contextualized model.

Another example of this phenomenon can be seen in international recommendations that called on Latin American countries to dismantle the grasp of the federal government or central state over educational provisions. In the 1980s, when such decentralization reforms were implemented in Argentina and Chile, neither greater efficiency nor equity resulted. Instead, private enrollments and socioeconomic segmentation increased (Narodowski and Nores, 2002). As Braslavsky and Gvirtz (2000) contend, decentralization proposals and similar recommendations such as vouchers and school autonomy were conceived in Anglo-Saxon cultures, which could draw upon rich historical experiences of local administration of education prior to reforms. Advocates of decentralization ignored the absence of these experiences in Latin America and minimized the legacy of regressive, elite-driven purposes that school systems had historically served. The adoption of decentralization reforms made a difficult situation even worse, and exacerbated deeply rooted social inequalities.

In short, for prescriptive international policies to thrive, they must consider the richly diverse economic, social, and political contexts in which education systems are embedded (Fagerlind and Saha, 1983: viii).

Religion, cultural diversity, and local institutions are often neglected in policy recommendations.

The educational proposals of international agencies seldom touch upon topics related to cultural patterns and religious traditions, which further contributes to their de-contextualized nature. This restraint might be rationalized in relation to Latin America, owing to its shared Christian traditions and extensive Western influence, but it proves problematic in non-Western states and Muslim societies. The suggestion that educational "best practices" can be transferred indiscriminately from one cultural context to another illustrates the widespread inattention to the cultural grounding of educational policies and processes. In Africa, for example, the roles played by languages of instruction, by indigenous philosophy or gnosis, and by the community in the education of its youth, are scarcely considered in proposals for educational reform (Mudimbe, 1988). Treating these issues as unimportant for the education of African children miseducates, rather than educates, for personal, national, and continental development (Jagusah, 2001).

Many scholars see the adoption of de-contextualized education models as disruptive for their societies. Incorporating implicit Western values through

schooling without taking into account indigenous values can prove unproductive and risky in the long run. For example, in Ethiopia, modern schools produced "culturally displaced" individuals who felt at home neither in their own culture nor in the imported foreign culture (Germa, 1982). Schools cultivated scientific attitudes, taught democratic institutions, and transmitted egalitarian values for an imagined society, even though realities on the ground remained prescientific, authoritarian, and hierarchical. According to Saqib (1981: 51), the injection of occidental values and lifestyles, mainly through haphazard importation of technology, runs counter to the values promoted by Islam and undermines the morale of their people.

Indigenous African traditions tend to emphasize collectivist orientations rather than individualistic ones (Mazrui and Wagaw, 1985). Patterns of African socialization and training are meant to reflect the values, wisdom, and expectations of the community and wider society. Western forms of schooling, which stress the "intellectual" development of the individual, have been less attentive to community needs, goals, and expectations. Knowledge of the rational, intellectual, and philosophical sciences may be an optional element for a Muslim; knowledge of the religious sciences is obligatory because it is "absolutely essential for man's guidance and salvation" (Naquib al-Attas, 1991: 40). By exclusively focusing on modern secular schooling, policy analysts neglect the potential contributions of Muslim forms of education to national purposes (Fisher, 1969). Despite the centrality of religion in many Muslim nations, educational strategies advanced by Western experts only reluctantly discuss the role of religious studies. Creative accommodations of religious and secular studies—or the lack thereof—may influence parents' willingness to enroll their children, especially girl children, in "modern schools."

Many experts in Africa, the Middle East, and Asia do not believe that the solution to this dilemma lies in abandoning one form of education (indigenous or religious) for another (modern). Public schooling can play a vital societal role if it addresses the cultural, social, and moral challenges, not just political and economic ones, facing local communities. Some scholars refer to this as creating a more domesticated or indigenized education system. For this reason, scholars and policy makers need to become familiar with the historical evolution and contemporary patterns of indigenous education (Bray et al., 1986: 109; Kelly, 2000). In today's multicultural world, a familiarity with both religious and cultural sensibilities and practices, as well as a consideration of ways to incorporate indigenous institutions within educational reform strategies, has considerable relevance.

Political actors and processes, as well as local economic institutions, are disregarded in international educational programs.

In the early 1970s, Heyneman (1971) argued that intergovernmental organizations seldom consider political factors in their recommendations—an argument that is still germane today. Two types of arguments have dominated international reforms, the adaptation and the empirical. The adaptation argument assumes that human nature is social and cooperative, and that the state,

party, and nation are logical tools employed by individuals to construct society. The empirical argument is deeply rooted in economic perspectives, which assume the primacy of individual motives and regard the state as neither the most efficient planner nor the best educator (Heyneman, 1971: 7). Both approaches underestimate (or disregard) political considerations and the role of political elites in educational processes, especially in less-developed countries. What and how schools teach, and which children have access to existing learning opportunities, are, in essence, the outcomes of political processes that involve multiple, often conflicting, actors and interest groups. Moreover, political attitudes and positions are likely to be decoupled from actual educational targets (Meyer and Rowan, 1977). National administrations may agree to pursue major educational reforms, sometimes based on recommendations of international agencies, but then dispense with effective implementation mechanisms. Indeed, in less-developed regions, the scarcity of resources and the enormous gap between the socioeconomic statuses of the educated and the uneducated turn any educational reform into a contested political issue.

Another problematic aspect of the de-contextualized policies proffered to less-developed countries, especially in Asia and Africa, is the disregard of (or inattention to) political outcomes, in contrast to ever-present economic ones. As we have seen, state building and re-conceptions of citizenship played crucial roles in the history of early national education systems. Coleman (1965: 53) argues that these tasks are no less important for the education systems of newly independent nations. Political integration and nurturing a political identity in the young are essential conditions for national unity and the viability and legitimacy of political institutions. The construction and preservation of a nation, or a national polity, depend on effective frameworks of socialization. Nevertheless, the educational agendas of international organizations rarely explicate linkages between specific educational polices or practices—for example, languages of instruction or languages taught (Perren, 1969)—and political outcomes such as nation building, political democratization, or national solidarity.

The absence of the political can also be seen in the neglect of salient political differences. International policies may focus on a particular geopolitical region, like Sub-Saharan Africa, and then minimize political differences, both past and present, and assume commonalities. Abdi (2003), for example, shows that variation in the political histories of Somalia, South Africa, and Nigeria differentially affected educational structures and outcomes (e.g., brain drain). Programs for African education and development, which often lack refinement in these matters, tend to suggest common solutions to the complex educational problems they address. Later, when policies fail, political explanations (e.g., party infighting, corruption) are advanced to rationalize lost educational opportunities.

Notwithstanding the deep belief in the power of education, Heyneman (1971: 110) argues that it is misleading to assume that schools can be the sole agents of social and political change, or even the prime movers of economic and agricultural development. Schools alone are unable to produce wide-

spread changes in rural life. They become effective only when they are part of a broader economic and social plan to make farming more productive (Griffiths, 1965, cited in Heyneman, 1971). As we have seen, vocational education programs or prevocational courses have little influence on local markets and employment conditions. Educational expansion, which produces un-, under-, and mis-employed school graduates, may unintentionally increase social tensions and political instability. In Ethiopia, for instance, the 1974 revolution was spearheaded by disillusioned students who felt uncertain about their future, by young military officers who joined the army after failing at school, by dissatisfied teachers, and by a large number of semi-educated young dropouts (Germa, 1982). In short, when educational reforms are treated in isolation from associated changes in economic and political organization, they are unlikely to bring about real social and economic progress.

International educational models are often inadequate and irrelevant in local context.

This paper has shown that international agencies, which act as independent initiators or catalysts of educational policies and models, shift the foci of their policies according to changing logics and imperatives divorced from local considerations. In the early 1970s, agency interest shifted from higher education to elementary education. Later, there was a change in emphasis from models based on formal education to those based on non-formal education, which stimulated an unprecedented number of studies and projects on non-formal learning supported by the World Bank and UNESCO. Nowadays, international agencies emphasize strategies that integrate school-based and out-of-school learning under the heading of "basic education" or lifelong learning (Bray et al., 1986: 16).

Under conditions of economic dependency, however, the ability of nations to select or adapt educational models is circumscribed. Poor or deeply indebted countries tend to be highly solicitous of aid, grants, loans, or technical assistance from international donors. In order to receive aid and to signal that they are responsible and rational actors, economically weak states construct "frameworks for action," which are consistent with international agendas (Meyer et al., 1997: 153). Thus, economic dependency reduces the possibility of less-developed countries to tailor international educational formulas to national needs and purposes.[14]

Latin American scholars, who have a long history of analyzing structures of external dependency, have been especially sensitive to the imposition of foreign educational models. The *Comisión Económica para América Latina de las Naciónes Unidas* (CEPAL) questioned the utilitarian character of educational planning in international organizations: "Economic growth is a needed condition for the human and social development but not a sufficient one.

14. China represents a contrasting case. Due to its geopolitical position and relative autonomy, China has been able to selectively adapt Western educational models and techniques to its own requirements and capacities (Lewin, 1987: 440).

This requires the implementation of adequate institutional and political reforms in the framework of an integral and organic conception of development process" (cited in Gimeno, 1981: 118). At a pivotal UNESCO conference of Latin American and Caribbean ministers of education in 1979, it was argued that the lack of relevance of the region's education systems stemmed from the fact that

> those systems have been created and developed…by following models of countries where the levels and features of development are very different, without any allowance being made for the specific historical context of the education systems….Moreover, imported educational models are inseparable from the development models that have likewise been imported and which have been underscoring the dependent character of the societies and economies of the region. The transplantation of models which are not in keeping with the cultural identity of countries does not foster a sufficiently intensive endogenous effort to identify problems and priorities and to devise types and forms of education that are consonant with actual national needs and capabilities… (UNESCO, 1979b: 24).

Education, as stated by the Mexico Declaration, should play a decisive role in creating a new, more balanced style of "authentic" development in which the production of goods and services is in line with "genuine social and national necessities." Education should give a human dimension to development, based on principles of social justice that strengthen awareness, participation, solidarity, and organizational ability, especially among underprivileged groups (UNESCO, 1979c: 69–70). Educational planners in particular should play a mediating role in securing the active participation of different sectors and actors and in helping to preserve cultural identities, redefine development goals, and overcome the forces of external domination (Gimeno, 1981: 128). Education is a population's right and it must be at the service of the whole social life (Terra, 1983).

Recent postcolonial histories of Somalia, South Africa, and Nigeria underscore how traditional models of education and development seldom respond to people's "genuine" needs and expectations (Abdi, 1998, 2003; Nwagwu, 1997; Harber, 1998; Soudien, 1994; Mzamane, 1990; Kallaway, 1984, 1989). The African quest for modernity, based on a different model of development, would eliminate Euro-modernity and gradually integrate indigenous, Afro-Christian, and Afro-Islamic traditions (Mazrui and Wagaw, 1985: 59). African intellectuals are deliberating on new conceptions of education and development, which draw upon non-Western cultures and are not designed for profit-seeking purposes (Devisse, 1995). From a Muslim viewpoint, the many shortcomings of international models are striking: "only Muslim people themselves can change and reform their education system—its entire structure, content, methodology and direction—in a fundamental way" (Khan, 1981: 23).

Final Note

Critiques from the "periphery" appear to have been partially heard by international agencies in the business of circulating educational policy. The discourse of the 1990s has integrated a multitude of new or reworked terms: gender parity, equitable access to appropriate learning and life skills, regionalization of education administration, endogenous education, localization, out-of-school education, flexibility, human development, and competencies. But have educational movers and shakers in Latin America, Asia, and Africa become genuine partners in the elaboration of their educational policies? Or has the lexicon been enhanced without an effect on the basic power inequalities between international educational experts and local decision makers?

Undoubtedly, new actors have consolidated a position that mediates between two poles—the global and the local. The last decade has witnessed the emergence of new transnational advocacy networks in education (Mundy and Murphy, 2004). A diverse range of nongovernmental organizations—for example, associations against child labor and the trafficking of women, aid and relief organizations, teacher and principal unions—have launched campaigns in support of public education for all. The efforts of transnational advocacy networks to link problems of educational access to issues of debt relief, human rights, and global equity, have been realized in recent international policy conferences (e.g., the 2000 World Education Forum held in Dakar). If this form of educational advocacy continues to develop (which seems likely), it may succeed in transforming the process by which international educational policies are generated and circulated (Mundy and Murphy, 2004: 20–21). The creation of such a global civil society may modify the terms of debate, reposition actors in this multi-dimensional system, and give rise to more contextualized educational models.

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Political Obstacles to Expanding and Improving Schooling in Developing Countries

JAVIER CORRALES

Expanding education to reach all children is expensive. In the most affluent democracies, where educational coverage is nearly universal, primary and secondary education accounted for an average of approximately 8.7 percent of government expenditures in 1999.[1] Because it absorbs a significant portion of available resources, providing universal education entails high opportunity costs for states.

The expansion of state-run or state-financed basic education may also be controversial because it entails increasing the influence of the state over society. This can provoke societal disputes, as different groups argue over who will influence the direction of state expansion (Platt, 1965) and, more contentiously, who will pay (see Weiler, 1984). Because educational expansion is costly and can be politically contentious, it is highly contingent on the existence of political incentives and pressures. States will expand education only if they face strong enough political incentives and pressures to do so, and if they can overcome political obstacles.

This essay reviews political science literature for the concepts and facts that shed light on the obstacles to educational expansion and ways of removing or circumventing those obstacles. It incorporates theoretical and empirical works—by international relations theorists, comparativists, political economists, as well as historians, anthropologists, and education experts interested in politics—on the incentives and pressures that developing countries face when deciding whether and how to expand and improve educational coverage. Although the field of political science may not reveal easy solutions to expansion-related conflicts, it can offer insights into the types of conflict that may emerge, the likely actors, and the various opportunities to confront these conflicts.

The central argument of the paper is straightforward: incentives and pressures for states to expand education and improve educational efficiency, par-

1. Based on latest data available in Organisation for Economic Co-operation and Development (OECD) (2002).

ticularly for the poorest and most remote populations, are weak and some-times perverse. On their own, states in developing countries are unlikely to achieve sufficient institutional capacity and political accountability to estab-lish universal primary and secondary educational coverage. The good news is that weak incentives and pressures can be augmented. For this, states will need extra help and extra funding. The involvement of both external and societal actors seems unavoidable, though potentially polemical.

INCENTIVES, PRESSURES, AND STAGES

The incentives and pressures that drive educational expansion differ as expan-sion progresses. Mounting evidence suggests that, over time, the expansion of education resembles an S-shaped curve (Clemens, 2004; Wils and Goujon, 1998; Fiala and Lanford, 1987; Meyer et al., 1977). Initially, states procrasti-nate in the provision of education, as the consolidation of power and neutral-ization of potential rivals outweigh the need to offer services to the popula-tion (Tilly, 1985).

When at a later point in their evolution states begin to provide educational services, the coverage typically expands rapidly. During this second stage, expansion is driven not by political incentives and pressures but by "self-gener-ating" forces: demographic growth among the population of educated indi-viduals; low marginal cost of expansion due in part to economies of scale and installed infrastructure capacity; the effects of state expansion, which include a greater demand for white-collar labor and therefore a greater state interest in educational expansion; savings generated by the decline in teacher salaries rela-tive to per capita gross domestic product (GDP); and pressure from organized unions and the already educated, economic growth, and rising household incomes (e.g., Clemens, 2004; Mingat and Tan, 2003; Parrado, 1998; Schultz, 1996; Fuller and Rubinson, 1992). Social and political factors such as levels of political participation, date of independence, ethno-linguistic divisions, regime type and international dependence make little or no difference in explaining different rates of educational expansion among countries, at least expansion occurring between 1950 and 1970 (Meyer et al., 1977).

These "self-generating" forces do not continue indefinitely. After reaching another threshold of coverage, educational expansion slows again, possibly stagnating or declining. At this point, the marginal costs of expansion increase steeply. Reaching the last sectors of the population is extraordinarily costly, often because it entails going to geographically remote or sparsely populated regions, or because unenrolled children are the most economically disadvan-taged.[2] Unless states find strong incentives and pressures to go forward with educational expansion, progress toward universal education may stall.

2. In every country, completion rates are lowest for children from poor and rural house-holds (Bruns et al., 2003: 32), and in South Asia and the Middle East, completion rates are lower for girls than for boys (Levine et al., 2003).

Both the speed of progress in the expansion of educational coverage and the quality of education provided vary across countries. In a study focused largely on primary education, Clemens (2004) finds that although after 1960 the typical country took about 28 years to increase from 75 percent net enrollment to 90 percent—significantly faster than was the case prior to the 1960s—there are huge differences in speed across countries (2004: 16). Similarly, Figures 1 and 2 show variation in the speed of expansion of secondary education. Figure 1 shows educational expansion among countries that started with less than 10 percent coverage (using the gross enrollment rate for secondary education) in the 1960s; Figure 2 shows expansion among countries that started with coverage ranging between 10 percent and 20 percent.[3] The achievements of individual countries over the same time period vary considerably. Some countries made little progress; others traveled far. The most striking variations occur among the countries that had the lowest starting points in the 1960s.

Among the countries that are close (or on track) to achieving universal coverage, two central issues arise: the efficiency of investment and the quality of instruction. Although these vary across countries, developing countries tend to spend inefficiently, over-investing in inputs that have a limited impact on educational attainment (e.g., salary increases, rather than teaching materials, testing, or infrastructure) (Bruns et al., 2003). Likewise, mounting evidence points to variations in quality across education systems. Standardized tests of academic achievement provide the information most commonly used to indicate or compare quality across countries.[4] These show an abysmal gap between the levels of student attainment in advanced democracies and the levels in developing countries, as well as between the attainment of Asian students and Latin American students (see World Bank, 2003; OECD, 2002). Student performance is not easy to explain on the basis of economic inputs, such as low teacher-pupil ratio or expenditures per pupil (Hanushek, 1995; Kremer, 1995; Simmons and Alexander, 1980). A recent attempt to explain the results of the Trends in International Mathematics and Science Study (TIMSS), a testing program involving more than 40 countries, reveals that school resources play a limited role in explaining variations in achievement.

3. The gross enrollment rate is calculated by dividing the total number of students enrolled at a particular level of education (regardless of the official age for that level) by the population that, according to national regulations, should be enrolled at this level. The ratio may exceed 100 percent because some enrolled students may be below or above the official primary or secondary school age. The net enrollment ratio is calculated by dividing the total number of enrolled students within the official primary or secondary school age by the population that, according to national regulations, should be enrolled at this level.

4. The use of test results as indicators of educational quality can be polemical because, among other things, they do not easily allow researchers to distinguish the effect of the education system from individual effort and other non-school-related factors. Nevertheless, test results are often preferred to other indicators of quality (e.g., completion rates, future income of graduates) because tests can be systematically applied across countries.

Figure 1: Evolution of Gross Enrollment in Secondary Education in Countries with Enrollment Under 10 Percent in 1960
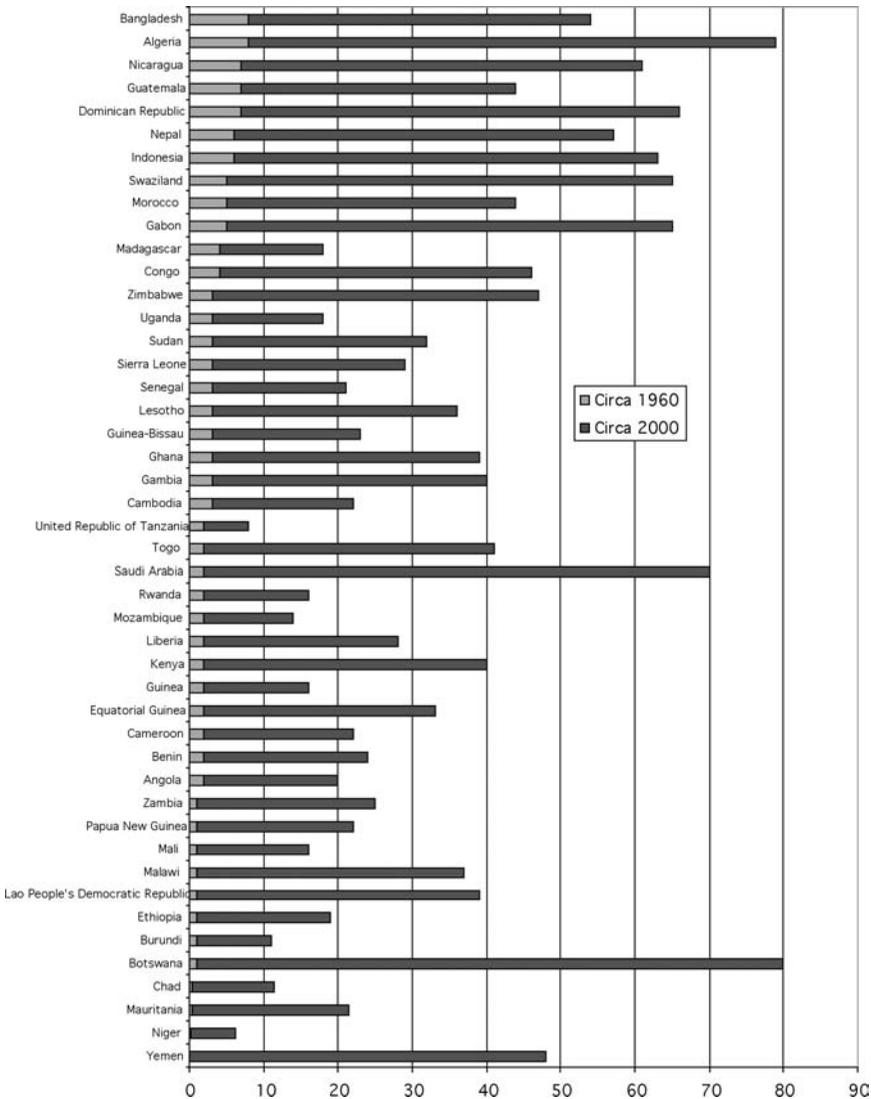
Although the study is based on only 37 cases, the results lead the authors to conclude that "looking beyond simple resource policies appears necessary" (Hanushek and Luque, 2003: 498).

This paper looks beyond resources by examining the politics of improving educational coverage and quality. No single study has conclusively explained variations in coverage and quality, and this paper does not attempt to carry out such a task. What follows instead is a synthesis of ideas, as opposed to a solution to the empirical puzzle of why variations in educational performance exist. This paper highlights arguments from the social sciences that may account for slow expansion or high inefficiency during the last stages of educational expansion.

Figure 2: Evolution of Gross Enrollment in Secondary Education in Countries with Enrollment Between 10 Percent and 20 Percent in 1960
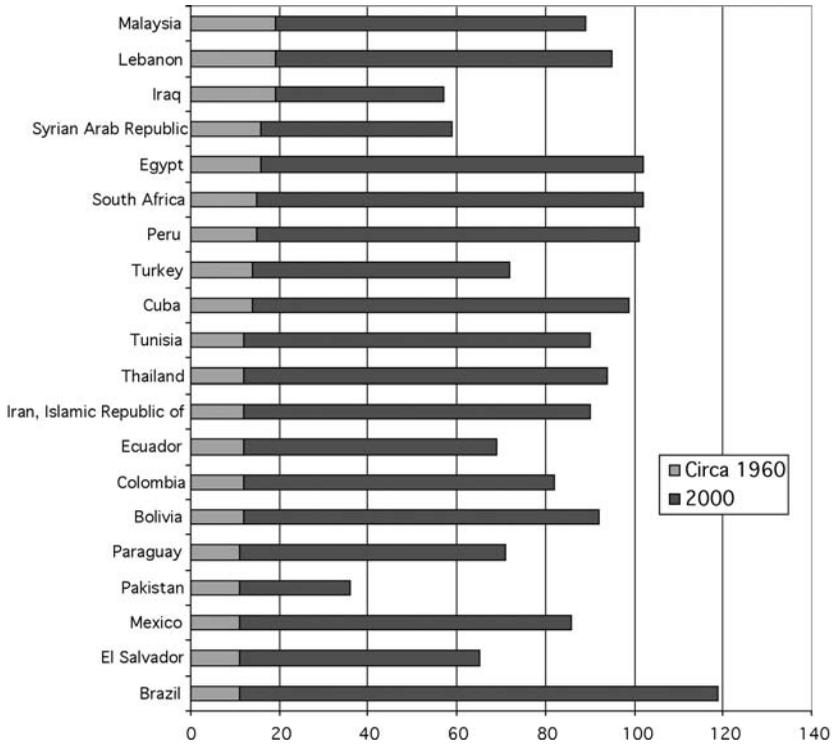
Scholars who study the development of states (e.g., Tilly, 1992), in particular the rise of state-provided services such as education (e.g., Ginsburg et al., 1990), argue that incentives and pressures emanate from three sources: the international arena (e.g., as a result of the workings of the international economy, the global spread of ideas, or competition with other states), the state (e.g., the desire to promote nationalism or to neutralize domestic rivals), and the society (e.g., the demands for services placed by citizens). I discuss each of these sources.

INTERNATIONAL PRESSURES

States face four types of international pressure to expand education. Three are global in scale: the exigencies of globalization, pressure from multilateral lenders, and the global spread of ideas. One type of pressure is regional, or limited to only a few countries: the desire to emulate or surpass prestigious peers. There is considerable debate about how decisive each of these pressures is, and, in the case of globalization and international lenders, about the direction in which these pressures push.

Globalization and the Role of Firms

Scholars have long recognized that globalization affects the expansion of education, but they disagree about whether its effects are positive or negative.

One argument suggests that globalization places a premium on skilled, flexible, and adaptable labor; as a result, nations that wish to compete in the world economy need to develop a highly educated workforce. Employers may conclude that a highly trained workforce will be easier and less costly to train than an uneducated workforce. For example, in a study incorporating interviews with company officials and reviews of internal documents, Nelson (2005) finds that high-technology firms consider local levels of educational attainment in choosing investment sites abroad and express this interest to local officials. Another recent study shows that U.S. foreign direct investment in Latin America between 1979 and 1996 gravitated toward countries with higher secondary enrollments, which suggests that education attracts international capital (Tuman and Emmert, 2004). The positive effects of globalization on education may occur through still other mechanisms. In their study of market reforms in Latin America during the 1990s, Stallings and Peres (2000) find that capitalist economies rewarded workers who were more highly skilled, which might increase citizen demand for education. Furthermore, the expansion of trade and capital flows can increase per capita income levels, thus increasing the resources available for education.

Even if globalization does not lead to increased demand by multinational firms for highly skilled workers, it could still lead to competition in the labor market, which might change the expectations of citizens. Facing the anxieties created by market economies, jobseekers might more strongly demand state-provided education as a way to protect themselves from the volatility of markets or to improve their status in comparison to other jobseekers. Although multinational firms may not demand high-level skills, they may nonetheless offer the best wages and working conditions in the country (see Graham, 2000; Moran, 2002). To compete for these better jobs, local citizens may decide to invest in their own education. Individuals pursue education not because it is directly demanded by firms, but because of what it signals to firms—that the worker is self-motivated and more capable of self-improvement than other jobseekers. Insofar as local workers are interested in emigrating, they might pursue education to enhance their chances of admittance into and employment in another country.

This could very well be one of the reasons that Buchmann and Brakewood (2000) find a positive relationship between the growth of the service sector and school enrollment in both Thailand and Kenya. Despite the low-skill nature of service jobs, citizens pursue secondary education to make themselves more competitive in comparison to other job applicants and more attractive to employers in this sector. It has thus been posited that capitalism generates demand for education, on the part of both firms and jobseekers. This might explain why the most globalized economies in the world also have the largest public sectors, of which education is a major component (Garrett, 1999; Rodrik, 1997; Cameron, 1978).

The opposing argument, that globalization has a negative influence on educational expansion, suggests that there are limits to the demand for skilled labor stemming from contemporary capitalism. Although some firms require

skilled labor, the preponderance of demand is for cheap and docile labor. Tendler (2002) even finds a "fear of education" among owners and managers of large modern manufacturing firms in the textile, garment, and footwear sectors of northeast Brazil. These firms remained competitive and export-oriented by investing precisely in high-illiteracy zones, and feared that more education would make workers "uppity." A second view argues that, to stay competitive, states and firms need to keep costs low. As a result, the exigencies of capitalism penalize states that spend too much to provide education and firms that spend too much to maintain a highly educated workforce. Some critics of globalization hold the contentious view that a global economy diminishes the capacities of nation-states to tax, and thus, to raise revenue for the provision of social services (e.g., Gray, 1998; Tilly, 1995; Cable, 1995). Education could very well be one casualty of this retrenchment.[5]

Perhaps the best evidence on behalf of the argument for globalization as a positive force is the response of several East Asian countries to a changing global economy. Starting in the 1960s, eight "high performing East Asian economies," to use the World Bank label, which had experienced an impressive drop in the school-age population, significantly expanded primary and secondary schooling and made dramatic improvements in quality and student achievement. For some countries, this educational expansion was a purposeful strategy to achieve international competitiveness by building human capital (Stiglitz, 1996; World Bank, 1993).

However, evidence against the positive-force argument is substantial as well. If capitalism is such an influential driver of education, why is it that only eight countries in the developing world have made great efforts toward and succeeded in the improvement of education? A study by the World Bank (2002) shows that between 1980 and 1997 the 29 "most globalized" nations, despite faster overall economic growth, did not expand secondary enrollments more than other nations (although they did much better in the expansion of primary education).[6] The demands of firms and the self-motivation of citizens, however strong under capitalism, seem insufficient to achieve universal education.

This is in part because international capitalism does not have a uniform global presence. Foreign direct investments vary considerably: although some firms need skilled labor, others do not (e.g., knowledge-based industries versus textiles), and even firms requiring skilled labor may focus on the quality of college graduates with technical degrees rather than overall schooling of the

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5. For a summary, see Ginsburg et al., 1990.

6. The World Bank (2002: 35) studied 73 developing countries. The countries are divided into two groups: the 24 most globalized nations, which increased their ratios of trade to GDP by the largest amounts between 1980 and 1997; and the rest. The World Bank excluded the richest economies (i.e., the OECD countries plus Chile, Korea, Singapore, Taiwan, and Hong Kong) from the list of the "most globalized." Although, in comparison to other countries, the most globalized group experienced an impressive expansion in the average years of primary enrollment for adults (from 2.4 to 3.8 versus 2.5 to 3.1), they did not perform any better in terms of secondary enrollment (from 0.8 to 1.3 versus 0.7 to 1.3).

population. The degree to which countries are exposed to global market forces also varies. Kaufman and Segura-Ubiergo (2001) study whether variations in exposure to globalization account for differences in social spending, including spending on education, in fourteen Latin American countries between 1973 and 1997. For social spending generally, their most robust finding is that exposure to globalization, measured as the degree of trade integration, negatively affects social spending. Trade in Latin America thus had the opposite effect that it had in Europe: it shrank the public sector.

Kaufman and Segura-Ubiergo also discover that this effect exists only on social security and pension expenditures. The effect of trade on education expenditures is completely different—trade has no significant impact. Rather than economic openness, it is domestic political variables that largely determine spending on human capital: populist governments "squeeze" spending on education to protect pensions, whereas governments in countries transitioning to democracy increase the budget allocations for health and education. It could very well be that more exposure to the exigencies of capitalism prompts governments and constituents to protect education expenditures. In sum, globalization is probably neither a strong nor positive force for educational expansion; it seems less powerful than domestic variables in determining educational spending.

Pressure From Multilateral Organizations

Another set of external incentives and pressures stems from international organizations that specialize in development issues, especially multilateral financial organizations such as the World Bank and the International Monetary Fund (IMF). These organizations offer loans and aid, with strings attached. In 2004, the World Bank financed education projects in 89 low- and middle-income countries.[7] At a minimum, the Bank and other lending organizations require borrowing countries to listen to their technical advice. In theory, borrowers must also agree to conditionalities—implementing certain policies to receive funding. Because countries often resort to multilaterals when they cannot find alternative financing sources, these organizations enjoy bargaining leverage over borrowers.

Critics of multilateral financial organizations make two main arguments about their impact on education: structural-adjustment lending is deleterious to education investments, and pro-education programs sponsored by multilaterals have major leaks, i.e., resources are easily diverted to alternative uses.

The first criticism—typically arising from the left—has seemed less applicable in recent years than it was in the past. The case could be made that prior to the 1990s the World Bank advocated policies that had deleterious side effects on educational expansion, such as reductions in social-sector spending, lower teacher salaries, and a focus on revenue generation. An eloquent statement of this belief is made by Geo-Jaya and Mangum (2001), for whom World Bank structural adjustment is "the enemy of human development."

7. See http://www.worldbank.org/education.

They use the example of Nigeria in the 1980s to show how adjustment led both to cutbacks on educational spending, which diminished the supply of education, and to lower incomes and higher unemployment rates, which diminished citizens' demands for education. As a result, investors stopped investing because they could not hire qualified workers. Without investment, Nigeria, like other countries in the same position, never could manage to escape its chronic economic crisis.

After the 1990s, however, multilaterals began to stress social spending not only for its role in cushioning the dislocating effects of market-oriented reform, but as an important ingredient for growth (see Hunter and Brown, 2000; Nelson, 1999; Carnoy, 1995; World Bank, 1993). This reflected a dramatic shift in paradigm: more money and more generous lending for education. Between 1970 and 1979, for instance, the World Bank committed an average of $248 million per year for education (in current dollars); today, the annual average is closer to $1.7 billion.[8] Latin America is a good example of the presumed impact of the new World Bank policies. The region worked closely with the World Bank and the IMF to stabilize economies and open markets in the 1990s. The region, together with Africa, was also the largest recipient of education lending from the World Bank. If the argument that "structural adjustment is bad for education" is correct, we should observe declines in education spending in the region. Instead, seven of nine Latin American countries for which we have data increased spending on education while simultaneously reducing the degree of state control over the economy (see Table 1).

Yet, the relationship suggested by Table 1 should be treated with caution; the numbers do not entirely refute the criticism that structural adjustment hurts education. Most Latin American nations in Table 1 experienced renewed growth in the 1990s, after a decade of stagnation, failed economic stabilization, and declines in social spending. They were bound to experience an expansion in social services in the 1990s. These examples do not reveal what happens to education when countries are fiscally ill (i.e., undergoing high budget deficits, recession, or capital outflow) and in the midst of implementing structural adjustment programs. Other research shows that when Latin American countries experienced budget deficits, their education spending declined (Huber, Mustillo, and Stephens, 2004). If the initial impact of an IMF stabilization program is a lower gross domestic product (GDP), as some argue (see Vreeland, 2003), then it is not unreasonable to conclude that structural adjustment, at least initially, may hurt education spending insofar as lower growth rates limit spending.

If evidence on the effects of structural adjustment on education is mixed, the second criticism—that loans earmarked for education are diverted—is increasingly persuasive. Multilaterals offer sound pro-education advice and plenty of resources; however, they have few ways of penalizing countries that fail to promote education. Nor do they have the capacity to monitor imple-

8. Based on data available at http://devdata.worldbank.org/edstats/wbl_A.asp.

Table 1: Market Reforms and Education Spending in Latin America: the 1980s vs. the 1990s

Country	Change in SOE Economic Activity	Change in SOE Investment	Change in Expenditures on Education
Argentina	-1.4	-6.3	0.52
Bolivia	-2.0	-3.1	2.31
Brazil	-0.3	-4.9	2.1**
Chile	-4.1	-8.8	-0.27
Costa Rica	NA	3.0	-0.64
Ecuador	NA	1.2	2.00
Guatemala	0.1	-1.9	-0.11
Mexico	-1.8	-4.1	1.22
Panama	-0.3	-5.1	0.10
Paraguay	-0.2	-5.7	1.95
Peru	-1.3	-6.2	0.15

Source: Calculated using World Bank (Various Years); SOE data are based on the 2000 edition.

Notes:
Change in SOE (State-owned Enterprise) Economic Activity is the difference between the average percent of GDP accounted for by SOEs in 1985–1990 and the average in the 1990–97 period. **Change in SOE Investment** is the difference between the average SOE investment as a percentage of GDI in 1985–1990 and the average in the 1990–97 period. **Change in Expenditures on Education** is the difference between the average education expenditures in the 1985–90 period and the average in the 1990–97 period.

** Data from Brazil prior to 1994, and from 1996 to 1998, are not available. The reported figure is the difference in percentage points between education spending in 1994 and 2000.

mentation. Without the capacity to monitor and sanction, it is hard to believe that multilaterals can exert much pressure on states. As de Moura Castro writes on the use of World Bank money, "all schools are built, most teachers are trained and computers purchased…but the reform component is not implemented" (2002: 395). In addition, although lavish in relation to other forms of aid and in relation to past aid, international aid on education generally accounts for less than 2 percent of the education budget of a recipient country (UNICEF, 1999: 81).

Hunter and Brown (2000) study the impact of World Bank lending on human capital variables in thirteen Latin American countries between 1980 and 1992. They concur with de Moura Castro that the World Bank has not had a significant impact on human capital investment in Latin America.[9] They find neither an upward trend in overall education spending correspon-

9. To determine the percentage of World Bank lending, Hunter and Brown divide World Bank lending to Latin America disbursed to a specific country by the home country's economic output, which is expressed as its share of the region's GDP.

ding to the beginning of the World Bank's emphasis on education nor any redistribution of resources from tertiary to primary education, which is one of the Bank's most insistent policy recommendations. Local institutional obstacles override the intentions and resources of the World Bank (Hunter and Brown, 2000).

Although important, Hunter and Brown's finding that the World Bank's efforts to promote education have little influence may not be generalizable because the selected cases are idiosyncratic in at least two respects. First, these countries already had devoted substantial resources to education and had relatively high coverage, i.e., they were at the last (flatter) stage of the S-curve. It makes sense to find low levels of World Bank influence at this late stage, when the cost of expanding schooling is high. It remains to be explored whether World Bank lending is more influential in countries at earlier points in the S-curve. This would make intuitive sense; in earlier stages, the cost of expansion is lower and World Bank support—always small—can have a larger impact. Second, Hunter and Brown's cases were idiosyncratic in terms of the period studied (1980 to 1992) which includes the period of the debt crisis, which Edwards (1995) labels a time of "muddling through" policy-making. Except for Chile and Bolivia, most Latin American countries until the late 1980s eschewed major policy reforms for political reasons—their governments were either unstable dictatorships or nascent democracies fearful of generating regime-threatening instability. It could be that under less economically and politically precarious conditions, pro-education lending by the World Bank is more influential. Hunter and Brown's study does not test this proposition.

The conclusion is therefore that poor domestic fiscal health is a worse enemy of education than any external actor. Countries in fiscal trouble require the intervention of external doctors (the IMF and the World Bank) whose medicines (structural adjustment) may depress social spending at first. International organizations now recommend that, once recovery occurs, states expand and reform social services, including education. Financial crises may also encourage states to recruit technical experts with training in economics, a preference for efficiency, and transnational ties (Domínguez, 1997; Grindle, 1996). Insofar as states retain these internationally minded, reform-seeking technical experts, multilaterals retain a window through which they can influence states. In most instances, however, the influence of pro-education World Bank lending may be limited. This is especially true for countries expanding education to the last and most difficult to reach populations, or those experiencing severe economic crises and policy paralysis. It remains to be seen whether World Bank education lending has a more noticeable effect under different conditions, i.e., in countries at the middle stages of the S-curve and those suffering less intense political crises.

The Allure of Ideas

The spread of ideas is another mechanism that may create international pressure to expand education. The idea that education is a public good, in the national interest of every state, is one of the most significant paradigm shifts

of the twentieth century (see Coleman, 1965: 3–32). Two centuries ago, most countries in the West considered education a privilege that only those already capable could appreciate and thus receive. Even as recently as the late 1970s, development experts did not agree about the economic benefits of education. As Simmons (1980) documents, some argued that the mass education of rural children would divert resources from investments with higher returns and also depopulate the countryside, creating an employment problem in the agricultural sector and an intractable unemployment problem in cities.[10]

Today, most political leaders, activists, and scholars embrace instead the idea that education is both a human right as well as a national good. Part of the reason for the shift in paradigm rests on the influential 1980 World Bank *World Development Report*. The report provided evidence that the expansion of schooling increased agricultural production and reduced fertility and mortality in developing countries. Education, the report showed, leads to smaller, healthier, more productive families in agricultural communities, and by extension, enhances development. Equally influential has been Psacharopoulos's work since 1973 on the private and social returns on educational investments. He shows that increased education of the labor force explains both increased returns to the individual, especially for the lowest-income individuals, and possibly a substantial part of growth in output, especially in developing countries. Investment in education "behaves in a more or less similar manner as investment in physical capital" (Psacharopoulos and Patrinos, 2004: 118).

Large international organizations and not-so-large non-governmental organizations have also become strong advocates of education as, in the words of the United Nations Children's Fund (UNICEF), both an individual right and a national good. This consensus at the international level is as consequential as two other paradigm shifts in the history of education in the West: the rise of humanism in the sixteenth century, which made erudition a virtue coveted by aristocrats, not just clergy, and the rise of social rights in the nineteenth century (see Marshall, 1964), which compelled European states to accept the idea of providing education services to citizens.

However, it is unclear whether this new consensus at the international level is equally strong within states. To test its presumed spread, Fiala and Lanford (1987) examine "formal expressions of national aims of education" among 125 countries from 1955 and 1965. They find a remarkable convergence: most governments cite the same set of reasons for providing education, top among which are the achievement of "national development," "economic development," and "individual development." For Fiala and Lanford, this is strong evidence of the existence of the new consensus across states. Yet Fiala and Lanford acknowledge that their study cannot prove that the consensus was more than empty promises made for the sake of appearances and that these ideas actually motivated educational expansion.

Ideas may not be all that influential because, to spread change across borders, they need more than just many adherents. It is also necessary that ideas

10. I thank Robert Levine for this insight.

find: 1) transnational institutional mechanisms of diffusion (Slaughter, 2004; Simmons, 2001; Goldstein and Keohane, 1993; Haas, 1992; Keohane and Nye, 1989), 2) institutional penetration in a host country (Jacoby, 2000; Hall, 1989), and 3) strong empirical support, especially in a neighboring country (Weyland, 2005). The idea that education is a "national good" and an "individual right" certainly meets the first criterion (i.e., through the technical missions of international organizations or the openness of Western universities to international students who then return home), but it may not meet the second or third criteria.

For instance, it is not clear that institutional penetration in developing countries has occurred to any significant degree. Ministries of education are not necessarily staffed with experts committed to education, and even if a ministry of education is duly staffed, other more important ministries, such as finance, might react with skepticism (see Corrales, 1999). This skepticism about the value of education, particularly in ministries of finance, is partly rooted in the third criterion—empirical support. Although UNICEF declares that education "is a matter of morality, justice and economic sense" (1999: 7), there is no worldwide agreement that educational expansion always makes economic sense. Despite its benefits at the individual level, there is still no conclusive empirical evidence that education, in and of itself, is the best antidote for underdevelopment (Easterly, 2002: 71–86). Hannum and Buchmann observe, "Controversy surrounds the proposition that investment in education results in measurable increments to growth in gross domestic product. The evidence is likewise ambiguous on whether education reduces social inequality and promotes democratization" (2003: iv). Even among believers in education, there is enormous disagreement about the most appropriate routes for expanding education (i.e., the proportion of state versus private investment, the proportion of investments in tertiary versus secondary education, and the degree of decentralization).

In sum, the transnational diffusion of ideas is an important source of educational expansion. The latest ideas on the benefits of education reach countries around the world, and these ideas persuade many citizens and leaders. However, the message is not necessarily implanted in the crucial political institutions, and sometimes not even within the ministry of education. The political power of international ideas will remain limited as long as there is empirical disagreement about the economic payoffs of education.

Emulating or Surpassing Peers

International relations scholars have long emphasized that the pressures of international political competition may shape domestic outcomes. To some scholars, the presence of an external threat is key, as it may induce nations into "balancing"—attempting to match and surpass the achievements of a rival nation. This may apply to education expansion; some important historical examples of military-political rivalry stimulating education include: 1) educational expansion associated with competition between Protestant and Catholic areas of Europe during the Reformation; 2) the emulation by

European nations of Prussia's universal education of soldiers, to which some ascribed Prussia's victory in the 1870–1871 Franco-Prussian War; and, more recently, 3) the expansion of science and engineering education in the United States and the Soviet Union during the Cold War.

However, in developing countries, this type of pressure seems less relevant because external threats stem mostly from neighboring countries over border disputes. This type of dispute places a higher premium on military preparedness than on competition for status, which limits the competitive value of bolstering education.

Emulation may occur, not only among international rivals, but also among mere status-seekers—nations that try to earn acceptance into a prestigious international community or institution (see Walt, 2000). For example, Southern Europe in the 1980s and Eastern Europe in the 1990s boosted education systems with a clear eye to earning the respect of, and thus membership in, the Western European community.

This type of external pressure also seems less applicable to developing countries. For emulation to occur, a nation must come to value membership in a specific international community (see Jacoby, 2000). In addition, the target international community must place a high value on the educational achievements of its members. Even the European Union, the most important example of a prestigious club with many aspiring members, places less emphasis on education than on other policy achievements (e.g., civil rights, human rights, economic development, and macroeconomic discipline). Few developing countries assign a high value to membership in communities that have education achievement as a standard of admission.

In sum, external pressures to expand education that arise from international rivalry or status-seeking seem to be less decisive than external pressures stemming from economic competition, which as discussed previously may not generate pressures for improvements in schooling.

STATE-BASED INCENTIVES

Promoting Nationalism and Loyalty to the State

The creation of loyalty to the state is a primary, if not the most urgent, task of every emerging nation. Since the time of Thomas Hobbes, we have known that states that do not command authority and respect from their citizens risk collapsing, possibly into civil war (see Kohli, 2002). Because they must generate loyalty, states have an interest in controlling the beliefs of citizens (see Pritchett, 2003). States may achieve this by promoting nationalism (see Linz and Stepan, 1996: 16–37) or by undermining the other entities in society that compete for the allegiance of citizens (e.g., religious organizations, tribal strongmen, or simple attachments to tradition or ethnicity). States have often promoted education vigorously because they see education as contributing to both the rise of nationalism and the weakening of rivals (see Benavot and Resnik, 2006).

There is little dispute that the desire to promote nationalism was a funda-
mental driver of educational expansion in newly independent states in the
1950s and 1960s, especially in Africa (see Sutton, 1965), just as it was in eigh-
teenth- and nineteenth-century Europe. State leaders wanted citizens to
develop loyalties to the newly independent state rather than with colonial
powers, i.e., to prove to their citizens that they could do better than the colo-
nial powers in the provision of services. During the colonial period, only
immigrants from Europe and Asia received high-quality government educa-
tion in Africa (Makau, 1995); after independence, citizens expected to enjoy
the services previously denied to them. Munishi (1995), for instance, argues
that after independence the Tanzanian government aggressively pursued
social-service expansion despite extremely limited funds. To gain political
legitimacy among many different tribes, the Tanzanian government, like
other African governments, sought to reduce the authority of NGOs, to pro-
mote self-help initiatives, and to expand state services under a "socialist" phi-
losophy akin to populism. The logic behind these initiatives was that citizens
would pledge their allegiance to a government that could provide new social
services, including education. By fomenting nationalism, the new govern-
ment would gain legitimacy.

If promoting nationalism at the early stages of state formation is a strong
enough incentive to expand education, we should observe more rapid expan-
sion in newly independent states than in other scenarios. However, Meyer et
al. (1977) examine this hypothesis and find no clear evidence that, in general,
nations immediately post-independence increase education more vigorously
than other countries. This finding does not necessarily negate that national-
ism drives education expansion, but it does suggest that nationalism—or
controlling beliefs in general—is an insufficient or short-lived source of polit-
ical energy for the expansion of education, too dependent on bottom-up lev-
els of threat. As the memory of colonial governments recedes, the need to
compete with these systems loses urgency.

Neutralizing Domestic Rivals

When the incentive to promote nationalism is combined with the incentive
to neutralize allegiances to religion, strongmen, or just tradition, the impetus
to expand education increases. In Western Europe, a fundamental push for
the expansion of education occurred when states prioritized secularization
and the modernization of citizens to make them more suitable for industrial
life. Another driver in the rise of mass education in nineteenth-century
Europe was the desire of "national elites" to compete against local elites for
the loyalties of local clients; and, even more fundamentally, the desire to
incorporate into society the "vagrant poor"—viewed as always needy and
mobile, and thus a potential threat to public security (de Swaan, 2001).

In the postwar period, totalitarian revolutionary regimes (e.g., the Soviet
Union and China) combined hyper-nationalism with vigorous efforts to neu-
tralize, even eliminate, strong domestic rivals. Lott (1999) shows that totali-
tarian regimes—the same regimes that seek to exercise monopoly over the

media—spend more on education than other regimes. These regimes do not seem to spend more on health, which suggests a connection between educational expansion and the desire to control a society, rather than a concern for human well-being. Totalitarian states extensively expanded education precisely because of their intense commitment to the control of society and to breaking old allegiances (see Coleman, 1965: 227). Using qualitative methods, Cheng and Manning confirm that the feature that distinguished educational expansion in China and Cuba between 1957 and 1976 from expansion in other post-colonial societies over that period—and what made the effort far more intense—was the state's desire to create a "classless community" and to generate a productivity breakthrough by imposing "voluntary" work on students (Cheng and Manning, 2003: 388–389).

In sum, regimes that have a strong desire or capacity to launch forceful attacks on traditional allegiances may also make a strong drive for education. However, except for the continued possibility of fundamentalist revolutions in the Islamic world, the incidence of revolutionary impulses has subsided worldwide. This may not be unfortunate. Revolutionary impulses come at a huge cost to human life, political liberty, and economic resources. Many democrats and humanists do not condone these efforts, however salutary they may be for educational expansion.

The insight remains that states interested in exacting control over citizens have a stronger motivation to expand education (Pritchett, 2003). This has troubling implications. First, there will be variation in the degree to which states pursue education provision: the more a state seeks to control, the more it will pursue expansion.

Second, the extent to which a state wishes to exercise control depends in part on how threatened the state feels by societal groups. The existence of strong domestic rivals to state authority may encourage educational expansion, but this depends on the nature of the rival. If the rival is an armed actor, the state will boost military spending; if the rival is mostly ideological and cultural (i.e., the church, tradition, certain ideologies, surplus immigration), the state might focus more on education than on the military.

Third, where church-state relations are delicate or tense, states seem to pay more attention to education; however, the specific response has varied over time and among countries. For instance, Western European states used education to neutralize the power of the Catholic Church in three ways. One was to placate the religious authorities by granting them complete monopoly over educational services—the prevailing model in Catholic countries for the sixteenth through early eighteenth centuries. In a later model, states offered mass schooling, thereby competing with the Church by providing a presumably cheaper, better, and more accessible education. This was the nineteenth-century model of the expansion of secondary education in Europe. A third option was to antagonize the Church directly by monopolizing education, akin to the secularist, revolutionary, totalitarian route of the twentieth century.

 Developing countries that face similar challenges from strong religious groups have sometimes replicated these models (Coleman, 1965: 41–43).

However, the most typical approach of these countries has been different: mutual assistance. In the Gulf monarchies, for example, massive educational expansion occurred in a form that was complementary to religious groups. The governments of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates officially endorse Islamic education for a number of reasons: it consolidates the partnership between the religious hierarchy and royal families; it allows countries to expand their cultural influence through Islamic university graduates; and it highlights the "pious" character of the state, creating a bulwark against radical Arabism and fundamentalism (Bahgat, 1998).

After the September 11 terrorist attacks, U.S. officials became convinced that the proliferation of Islamist schools in Islamic countries, without a commensurate development of secular schools, could pose a threat to international security, i.e., without a sufficient number of well-run secular schools, poor parents in Islamic countries send their children to Islamist schools, which can act as breeding grounds for fundamentalist thinking. The U.S. Agency for International Development thus increased education-related spending in Islamic countries (Perlez, 2003). The desire to defeat potential religious and traditionalist rivals to state authority—this time at the international level—again proved to be a major incentive for educational expansion.

Fourth, states that have less controlling ideologies or limited capabilities may falter in providing education. Specifically, states that feel that they can afford higher degrees of pluralism at home may be less inclined to invest in educational expansion because they are less interested in social control. If this holds true, then democracies, which by definition are more comfortable with dissent and pluralism, may be less driven to expand education than more controlling dictatorships. Universalization in these societies may only occur if societal demand is strong, as discussed below.

Fifth, states may hesitate to expand education out of a fear of generating instability. One common fear centers on the possible sociological outcome of more education, what I call the "Educated-Unemployed-Gramsci" phenomenon. This is the fear that rapid education will produce a mass of educated but unemployed citizens and lead to a plethora of "Gramscis"—a reference to Antonio Gramsci (1891–1937), a well-known Marxist theorist who escaped rural poverty through schooling, including university education, to become one of Italy's most famous political agitators.[11] As LeVine et al. (2001) explain, education plays a dual role in forming citizens. On the one hand, education creates literate citizens who are competent in communication, an outcome that most states would welcome. However, education can also undermine traditionalist norms and empower challengers to the state, outcomes that governments may not welcome.

Another fear centers on the bureaucratic outcome of educational expansion. More education leads to more bureaucracy. Since Max Weber, many political scientists have assumed that bureaucracies are politically functional

11. Fuller and Rubinson illustrate this argument by showing that conservative town council leaders in nineteenth-century France "feared that mass schooling would feed rising social expectations held by the working class and rural peasants" (1992: 9).

for rulers. Bureaucracies allow rulers to meet certain societal demands (see Tilly, 1992), to make societies "more legible"—to use Scott's (1998) term—and thus more pacifiable, or to protect policies from the assaults of political adversaries (McCubbins et al., 1987). Yet there are times when rulers prefer *not* to build bureaucracies because they fear that political rivals will capture the bureaucracy and use it against them. This is precisely what Reno (2000) argues is happening in many African states, especially in Cameroon, Kenya, Zambia, Congo-Kinshasa, Congo-Brazzaville, and Uganda. Rulers are reducing investment in bureaucracies, and thus in education and other social services. Reno's work concludes that, in the context of strong societal adversaries and hopelessly weak states, the rational strategy of rulers is to neglect investments in bureaucracy, because it both takes resources away from other means of dealing with adversaries and could ultimately be captured by rivals.

In conclusion, the degree of educational expansion may depend on variations in the strength of state capacities and ideologies, as well as the strength of societal rivals. Table 2 summarizes some possible combinations of these variables and the expected educational outcomes, with examples. At the beginning of the twenty-first century, most developing countries find themselves in quadrants II or III, where there is low drive for education. The exceptions are democratic Latin American and Asian countries, which might be reaching quadrant IV. In these countries, universalization and improvements in quality depend less on state-based incentives (which are weak in democracies) and more on the strength of societal demand (which varies across and within democracies).

Clientelism

In addition to neutralizing rivals, states must also repay those who provide political support. Rulers have always allowed or encouraged the use of state resources to reward citizens who render useful political services (Bates, 1981; Krueger, 1974; Buchanan and Tullock, 1967). The distribution of valued resources—tangible or intangible—according to political criteria is often called patronage (Pasquino, 1996). When patronage flows from a strong actor toward a weak actor, it is called clientelism (Stokes, 2000; Graziano, 1975; Scott, 1972). When funds or favors are illegally exchanged between economically powerful actors and public officials, misaligning the public interest and the interest of the public official, it is called corruption (see Rose-Ackerman, 1998).

Clientelism, patronage, and corruption are three of the most intense political forces that push states to expand education. It is clear why education lends itself to patronage. As Rose-Ackerman (1998) argues, patronage flourishes around large government activities, such as investments in infrastructure. Education qualifies as a large government activity.

Patronage and clientelism can aid educational expansion also by protecting social spending in poor countries during periods of economic contraction. Brown and Hunter (1999) find that poor democracies of Latin America, which are arguably more susceptible to patronage and clientelism, are less likely than authoritarian regimes to cut social spending when faced with ris-

Table 2: Variations in State and Societal Features: Impact on Educational Expansion

	State Features	
	State vigorously seeks to control civil society (ideology and capabilities are strong)	**State refrains from seeking to control civil society (ideology and capabilities are soft)**
Strong state challengers	I. Strong education push, driven by state's desire to neutralize societal rivals (e.g., totalitarian-revolutionary regimes of the 20th century)	II. Weak education impulse and possible neglect of bureaucracy (e.g., fragile regimes in Africa)
Weak/few state challengers	III. Low education drive because states face no political pressure to provide benefits (e.g., stable autocratic regimes in developing countries)	IV. Strong education push *only* if societal demand is strong (e.g., democracies in the 20th century)

(The left-hand vertical label reads "Societal Features".)

ing debt burdens, slower growth, and budget deficits. These effects dissipate as income rises, however. In more developed countries, there is no clear difference in the extent to which different regime types protect social spending.

As a mechanism for expanding education, clientelism carries with it undesirable baggage. It is the main explanation for the tendency of public school systems to be more inefficient (i.e., have a higher input-to-output ratio) than private school systems within the same country: private schools invest more on classroom-based inputs such as instructional materials and teacher incentives, whereas public schools invest in external resources such as wages and procurement (Jiménez and Lockheed, 1995). The latter are typically driven by patronage. Although there are exceptions—mostly in Southeast Asia—of corruption co-existing with relatively efficient school systems, corruption more frequently goes hand in hand with misguided educational investment for at least four reasons.

First, clientelism drives the state to expand public employment without demanding that public employees fulfill their responsibilities. In this way, patronage undermines the legitimacy of government and politicians, magnifies the power of vested interests, lowers the quality of services provided by the state, and erodes the impact of social policies. Patronage may protect spending on salaries but not the expenditures necessary for effective education (e.g., training, facilities, infrastructure maintenance).

Second, corruption may deplete overall resources, leaving less for investment. In a quantitative study of corruption—a proxy of patronage[12]—Gupta et al. (2000) find not only that corruption depletes overall resources, but also that corruption increases the cost of and lowers the output provided by lower

12. Like patronage, corruption constitutes the channeling of public resources for private gains. In addition, patronage and corruption tend to occur simultaneously (see Stokes, 2000; Mainwaring, 1999b).

levels of government and social services, especially in the health and education sectors. By decreasing the quality of government services, corruption depresses the demand for such services. Combining different indices of corruption (i.e., perceptions among investors of uncertainty and unpredictability about laws, policies, and regulations), Gupta et al. find that countries with lower indices of corruption have 26 percent fewer student dropouts at the primary level.

Third, corruption hurts educational expansion because it distorts the composition of government expenditure. A landmark report by the IMF showed that corrupt governments, which presumably find it easier to hide the diversion of funds, spend less on education and more on public investment (Mauro, 1996). A country that reduces corruption will typically simultaneously raise its spending on education (Mauro, 1996).

Finally, clientelism also operates from the bottom up: local politicians commit the national government to spend more on education (e.g., building more schools) without securing revenue for maintaining the facilities. The result can be an expansion of physical resources followed by quick decay of facilities.

Several qualitative studies show the close connection between clientelism and inefficient education systems. Plank (1990) shows that in the democratic administration of Brazilian President José Sarney, governors who supported a five-year term for the president were showered with federal monies for their states, while governors who supported a four-year term received little money. Textbook monopolies were granted to specific publishing firms, also as an exchange of favors and not according to a judgment of quality or price bidding. Mainwaring (1999b: 213) finds that in the state of Bahia in northeast Brazil, which has an illiteracy rate of almost 50 percent, an estimated 37,000 teachers on the public payroll as of early 1987 had never taught a single class. A case study of the Indian state of West Bengal shows that political connections dictate whether a teacher will or will not be reprimanded for poor performance and also discourage the government from holding schools accountable (Ruud, 1999). Researchers making unannounced visits to schools in India find that, on average, schoolchildren receive one minute of individual attention per day from a teacher (PROBE Team, 1999) and that one in four teachers is absent on any given day (Kremer et al., 2004). This may be explained by the inability of these schools to monitor or sanction teachers.

In short, patronage and clientelism are double-edged swords. On the one hand, they can be the main drivers of educational expansion in developing countries. On the other hand, except in some Southeast Asian countries, patronage and clientelism—and accompanying corruption—can present major threats to the quality and efficiency of education. These costs may mitigate any gains in educational expansion.

Incentives to Increase Efficiency

Ideally, a government will want not just to expand education, but to expand education efficiently. If patronage is the prevailing incentive to states to provide education, however, the public education system will be plagued by inef-

ficiency and inattention to quality. In a patronage scenario, it is more convenient to expand coverage (e.g., build new schools or add teachers to the payroll), which involves spending money to co-opt political actors, than to fix inefficiencies, which may involve taking resources away from underperforming actors.

Estimating inefficiency rates in a school system is difficult, even if one accepts Simmons's commonsensical definition of efficiency: "the optimum combination of inputs such as teacher training and expenditure per student to achieve at least-cost the desired outcome, such as a certain level of reading achievement" (Simmons, 1980: 10). The problem is that estimates vary depending on the outcome that a school is asked to deliver—a decision that teachers and parents often disagree on—and more important, student or community characteristics that vary across schools and classrooms. For example, a school whose students are mostly poor, foreign-language speaking, recent immigrants will require more resources than a school with children from middle- or upper-class families, but this does not mean that it is less efficient.

Nevertheless, there is ample evidence dating back to the 1970s that rates of school inefficiency are greater in developing countries than in developed countries. Simmons (1980) reaches this conclusion by examining "wastage rates," which compare the level of investment in relation to several education outputs. These outputs include dropout rates (i.e., desertions based on student's volition), pushout rates (i.e., desertions based on school action), and repetition rates. Although scholars might disagree on the amount of inefficiency, there is agreement that high wastage rates are pervasive in developing countries. This inefficiency probably accounts for the finding by Alesina (1997) that spending on public education—and public health, public employment and social security—often favors well-off communities, fails to reach the poor, and implies distortions, especially in Latin America, Africa, and rural areas.

One possible incentive for states to increase efficiency in education is the desire to create savings. Cash-strapped states have much to gain by increasing the efficiency of schools, spending less money to achieve similar or better outcomes. In the 1990s, many states developed a historically unusual preference for savings, including lower debts, deficits, and inflation rates. This heightened concern for savings and efficiency in social services, a shift resulting from internationally circulated and accepted ideas, has significantly impacted the propensity of states to pay attention to educational issues. Ministers of finance with a strong preference for savings typically become key political actors pushing for efficiency.

However, pro-efficiency forces at the state level are typically counterbalanced by other state leaders who fear that taking resources away from current beneficiaries will generate political conflict (see Robinson, 1998). These fears, typical of politicians dependent on patronage relationships, can block measures designed to increase efficiency. If ministers of finance do not see a way to maximize efficiency, they may become reluctant to endorse increases in spending in education, which may in turn prevent universalization.

The politics of pushing for efficiency thus involve conflict at the state level, usually pitting three cabinet-level actors against each other: 1) savings-oriented ministers of finance who block education spending unless accompanied by efficiency gains; 2) ministers of education who may desire efficiency, but who also want far more spending than finance ministers allow; and 3) patronage-seeking ministers who care less about generating savings than about keeping crucial political constituents happy with state largess (see Corrales, 2004a; 2004b).

Conflict will not be confined to state actors. Involvement by other actors will depend on at least two variables: overall GDP, which determines the country's available resources, and the existing level of efficiency. Colclough and Al-Samarrai (2000) offer a useful framework for understanding the relationship between these two factors, as well as their policy implications. In a study of education in Africa and South Asia, they show that countries vary enormously in terms of GDP level and one possible proxy of inefficiency—unit cost of education (measured in terms of spending per student).[13] Although the reason for variation in unit costs (not just within Africa, but across developing countries) remains to be explained, we can nonetheless use Colclough and Al-Samarrai's work to generate some hypotheses about expected political conflicts.

As Colclough and Al-Samarrai note, the ideal policy prescription for a given country depends both on a country's GDP and the unit cost of education (see Table 3).[14] For countries that have high unit costs and relatively high GDP per capita (quadrant I), the policy imperative is to cut costs *and* spend more.[15] If the country has a low GDP per capita (quadrant II) and high unit costs, the policy imperative is to cut costs, of course, and also to stimulate economic growth and borrow more. If the country has low unit costs and high GDP per capita (quadrant III), the policy imperative is simply to spend more (i.e., cutting costs is unnecessary). Finally, a country with low unit costs and low GDP per capita (quadrant IV) will need to focus first on generating economic growth, in order to be able to afford spending on education. Each of these four policy prescriptions may generate different types of political conflict.

Unquestionably, countries that need to cut costs will face the harshest political conflicts. Typically, high unit costs result from relatively high teacher

13. The use of unit cost as a measure of efficiency is open to criticism, as unit costs are blind to variations in the needs of different communities. However, for the purpose of this paper, unit costs serve as a useful measure of efficiency in considering how variations in a country's overall income and efficiency determine the recommended educational policies, and consequently, the expected political conflict.

14. For higher-income countries, Table 3 could be modified to reflect differences in fiscal health, rather than GDP levels. Fiscally stable countries have more resources to invest in education, and so their politics of education reform will resemble quadrants I and III; countries in fiscal trouble will exhibit the politics of quadrants II and IV.

15. Again, analysts might disagree with this recommendation. It could very well be that addressing inefficiency may require an increase in investment (e.g., improve infrastructure facilities, provide better training for teachers, etc.), at least in the short term.

Table 3: Unit Costs, GNP levels, and the Politics of Education Reform

		GNP per capita	
		Medium (> US$300) *Modest Financing Need*	**Very small** (<US$300) *Large Financing Need*
Primary Unit Costs as a proportion of GNP per capita	**High** 12% or higher; avg = 21%	I. Policy Imperative: cut costs, increase spending Examples: Kenya, Senegal, Burkina Faso, Rwanda, Mauritania, Pakistan Expected political problem: unions	II. Policy imperative: cut costs, stimulate growth, borrow, and spend more Examples: Burundi, Mozambique, Ethiopia Expected political problem: unions, politicians, and intra-cabinet
	Low 11% or lower; avg = 7%	III. Policy Imperative: Increase education spending Examples: Zambia, Ghana, Central African Republic Expected political problem: If deficit and debts are large, the IMF and finance ministers will oppose new spending	IV. Policy Imperative: Increase growth and borrow money Examples: Sierra Leone, Uganda, Zaire, Malawi, Chad, Gambia, Tanzania, Bangladesh Expected political problem: Debate among cabinet members about how to stimulate growth

Source: Based on Colclough and Al-Samarrai (2000).

Note: High unit-cost countries include countries whose current primary and pre-primary education spending per pupil is higher than the sub-Saharan Africa average (12 percent of GNP per capita). Low unit-cost countries are those whose current primary and pre-primary education spending per pupil is below the region's average.

salaries. Because it is often difficult or inadvisable to cut teacher salaries, states must use alternative mechanisms to generate savings, such as increasing the student-teacher ratio or introducing more flexibility in the labor market for teachers, etc. These types of changes are not generally favored by unions, and as a result the politics of cutting costs will likely generate strong conflicts between states and teachers' unions.

If GDP levels happen to be low (quadrant II), conflict will occur, not just between the state and unions but also among leading politicians. The need to generate income and to stimulate growth will cause serious debates throughout the whole political spectrum, as all actors will have different views about the amount of debt to assume and the policies that will produce growth. Tensions between ministries of finance and education, within the ruling party, and between the ruling party and opposition forces are almost guaranteed.

If unit costs are low, politics may be less contentious. This is especially true if GDP per capita is high (quadrant III). However, even in this scenario, the possibility of a serious political conflict may develop between the state and the IMF if an increase in spending hurts macroeconomic stability.

One of the strongest explanations for the rise of state-provided services—the welfare state—comes from the "politics of contention" school of thought. This school posits that a state will forego the provision of services unless citizens bargain with, and in fact pressure, the state. Some political scientists go as far as to claim that education is mostly a citizen-driven phenomenon (e.g., Craig, 1981). Although this may be an overstatement, there is no question that household demand is crucial for educational expansion, as opposed to services such as health, where demand is universal and context-independent (Levine et al., 2003: 11).

Some of the factors that influence societal demand are intuitive. For example, other pressing social crises may draw a society's attention and resources away from educational services. Even though citizens want educational expansion, they may not prioritize education before other issues (e.g., crime, unemployment, corruption). Kaufman and Nelson (2004), for instance, demonstrate that although Latin Americans prioritize education, it usually comes in second relative to issues such as crime or unemployment.

Other factors affecting demand are more complex and are related to a society's bargaining capacity. Even when societal actors have a strong preference for more education, demand may falter if societal actors lack the capacity to pressure of the state. This section discusses five factors that may shape a society's bargaining capacity: income, organization, information, ideologies, and competitive politics.

Income and Organization as Enablers of Expansion

Income and organization are probably the two most important factors that explain a society's capacity for bargaining, although neither is a sufficient or an unambiguously positive force. Most studies of educational expansion find that income is the most important driver for at least three reasons. First, a higher aggregate income level allows states to invest more in education, although it is important to note that expenditure on education alone is not sufficient to produce universal coverage (UNDP, 2003; World Bank, 2003). Second, as family income increases, the ability or willingness of citizens to temporarily forgo income to continue their education also increases. This explains why higher national income levels lead to increased societal demand for education. Third, income whets the state's appetite for taxes. In the effort to capture more taxes while retaining citizens' loyalty, states might feel more compelled to negotiate with citizens, thereby giving rise to social services.

Low income in general is the most significant barrier to educational expansion; the poorer the country, the more difficult it is for other policy interventions (e.g., increases in public expenditures on education) to compensate for the drag effect of low income (Clemens, 2004).

On an individual level, low-income parents making decisions about their child's education must consider not only the actual cost of schooling but also the opportunity costs, such as the foregone income from a child's labor. The opportunity cost of attending school may be higher in rural areas, but there is

no question that poverty—more so than rural lifestyle—is the most significant deterrent of parental demand for schooling and the primary factor leading to desertion. Buchmann and Brakewood (2000) find that impoverished subsistence farmers in Thailand are less likely than wealthier counterparts to send their children to school.

Where schooling is costly, low-income families are often forced to strategize in a way that limits demand for education. In rural Nepal, for example, it is common for poor households to trade the further education of one son for the schooling of other sons (Ashby, 1985). The most promising son pursues a high level of education, while the others forgo school to help with work at home. The educated son is then expected to use his education to benefit his family. In an age-adjusted survey, Ashby finds that, in 83 percent of Nepalese families, at least one son obtained greater schooling than his brothers.

Lack of income can be an obstacle to educational expansion where households derive a significant portion of their income from child labor. Myron Weiner's book on child labor in India makes the alarming argument that in societies ravaged by poverty, where households rely on child labor for income, sending children to school entails substantial foregone income (Weiner, 1991). Parents, therefore, are reluctant to release children from work to send them to school. Fuller and Rubinson (1992) take this argument further. They argue that during the early stages of industrialization, when demand for child labor is large, parental demand for schooling may decline precisely because sending children to school represents forgone income. Where schools are in disrepair, or where education is of poor quality, parental reluctance to send children to school increases (PROBE, 1999), because the perceived economic returns to education are low. The successful provision of two public goods, education and termination of child labor, is constrained by their direct cost to households.

In a chapter that compares India to Western Europe, Weiner develops the argument that educational expansion will occur after societies have undergone a major cultural shift: when parents stop seeing children as assets, generating income for older household members, and begin to consider them more as liabilities who receive income from the older household members (1991: 114). Only households in the latter category are prepared to release their children from child labor to education.

The best sign that this transition—from children being considered assets to being considered liabilities—has occurred is a demographic shift toward smaller families. Weiner's argument leads to the hypothesis that educational expansion is more likely in countries whose fertility rates have declined, not so much because a small student population makes state services less costly, but because the fertility decline is a proxy of parental willingness to send children to school (i.e., a sign that they have changed how they view children). This argument can explain the enrollment successes of East Asian economies. Between 1965 and 1989, these countries experienced dramatic declines in the school-age population followed by dramatic achievements in secondary enrollment (see Table 4).

The question is, then, what comes first—demographic change or educational expansion? It is possible that the direction of causality changes depending on the stage of educational expansion. In the early stages, minimal provision of education seems necessary to spark demographic change. Research shows that small increases in the education stock of the population—namely, increases in female literacy rates—generate a substantial decrease in birth rates (see Hannum and Buchmann, 2003). Once this process is underway (i.e., after birth rates have begun to decline rapidly), then the direction of causality changes. Demographic change triggers educational expansion along the lines hypothesized by Weiner, where declining birth rates are associated with greater parental demand for education and lower marginal costs of educational provision.

This two-stage hypothesis linking education and demographic change might explain the education achievements of the Indian state of Kerala. By 1990, Kerala had one of the highest levels of human development, especially literacy, in all of India. One of the reasons for Kerala's success in education could very well be the early expansion of female literacy. By the early 1920s, the three provinces that compose present-day Kerala (Trancavore, Cochin, and Malabar) had achieved female literacy rates that were far above the Indian average (see Table 5). As the two-stage hypothesis would predict, major demographic changes soon followed (see Drèze and Sen, 1995); by the 1950s, birth rates in Kerala were declining at a faster rate than the national average. By the early 1970s, the birth rate in Kerala was 31.6 per 1,000 relative to 36.8 per 1,000 for all of India.

Table 4: Declines in School-Age Population and Enrollment Levels

	School-age (0–14) Population as a Percentage of Total Population		Secondary Enrollment (Percent Gross)
	1965	**1989**	**1990**
East Asian			
Hong Kong	40	22	79.6
Republic of Korea	43	26	89.8
Malaysia	46	37	56.3
Singapore	44	24	68.1
Others			
Bangladesh	43	44	19.0
Kenya	47	51	24.1
Nigeria	46	48	24.9
Pakistan	46	45	22.7

Source: World Bank (1993).

The two-stage literacy-demography argument seems plausible for Kerala, but it is not conclusive. In Kerala, the literacy-demography variable coexisted with another social variable that may have had an equally strong impact on schooling: heightened political competition (see Appendix). Historical competition among religious communities, post-independence competition among political parties, and other strong and contending societal organizations also contributed to Kerala's strong performance in expanding education.

Raising income levels and reducing the opportunity costs of education, however, might not be necessary to propel the state to provide the needed educational expansion. Even materially deprived citizens can force states to provide services if they become politically organized, for example in political parties, labor unions, or other organizations for parents or communities.

Studying developed countries, Swank (2002) finds that those organized along corporatist lines (i.e., numerous unions with collective negotiations between the government and unions) have resisted the retrenchment of welfare services that may result from the pressures of globalization. In Latin America, scholars attribute the push for education in the region to populist political parties and teachers' unions, which were strong in the postwar period. In Africa, where parties and unions are weaker relative to those in Latin America, societal bargaining leverage vis-à-vis the state has been lower, which explains in part Africa's slower educational expansion. However, the absence of strong parties and unions is not necessarily an insurmountable handicap. Although parties and unions are weak in Africa, parent and community organizations are strong in some countries (e.g., Kenya); this contributes to educational expansion.

Table 5: The Possible Link Between Female Literacy and Demographic Change in Kerala, India

| Circa | Female Literacy Rates | | | | | Birth Rates (per 1,000) | |
	India	Kerala*	Trancavore**	Cochin	Malabar	India	Kerala
1891	0.5		3.5	5.5	3.9		
1921	1.9		15.0	9.4	4.9		
1931	2.4		13.9	18.5	7.5	45.2	40
1941	6.9		36.0	30.6	—	39.9	39.8
1951	9.3		37.0**	—	21	41.7	38.9
1961	12.9	38.9					
1971	18.7	54.3				36.8	31.6
1981	24.9	64.5				33.8	25.6

Source: Female literacy rates from Jeffrey (1992: 60); birth rates from Ramachandran (2000: 48).

Notes: * The state Kerala formed in 1956 with the union of Trancavore, Cochin, and Malabar. ** The state Trancavore-Cochin formed in 1949.

In short, states will deliver services when societal actors have the income or the organization to bargain with the state. This argument helps to explain the steepest part of the S-curve. Once the state offers a minimal amount of education, mechanisms that lead to self-sustaining pressures are set in motion. The result is a virtuous cycle: state investments in human capital increase the income of citizens and draw them to cities. Wealthier, more urbanized citizens are then more inclined to organize, which increases pressure on the state to deliver even more education.

This argument might also explain the flattening of the S-curve after a certain income threshold is reached. Because income and urbanization, and thus organization, do not spread across society uniformly—with the persistence of poverty in rural communities and in marginalized ghettos— there will be some demand failures. The poor and the unorganized may fail to strongly petition the state, resulting in large underserved communities. Because the two ingredients needed for the occurrence of effective bargaining—income and organization levels—are typically low or very unevenly distributed in developing countries, societal demand for education may falter. The central tragedy is that those who would profit the most from universal education— i.e., the households who would obtain the highest returns from education, namely, low income groups in low-income countries (see Psacharopoulos and Patrinos, 2004)—are those least likely to be politically organized to make effective demands.

It is important to note that this argument has limits. It cannot explain why some countries, even ones that are comparatively wealthy and that have organized citizens, encounter serious difficulties in providing universal and efficient educational coverage. It also does not account for the underachievers, an indication that there may be a negative side effect to income and organization.

Income and Organization As Obstacles to Expansion

Under certain conditions, income may stand in the way of educational expansion. High-income groups, for instance, can skew public spending on education to the detriment of lower-income groups, because they have either more resources to spend arranging for government benefits or more bargaining power due to the higher level of tax revenue they generate (see Gradstein, 2003). One notable indication of the stranglehold that high-income groups have on educational services in the developing world can be found in the treatment of university systems. In developing countries, universities are frequently overfunded in relation to secondary and primary education and simultaneously underfunded in terms of resources invested in research and development. The result is a heavily subsidized service grant to the middle classes (see UNICEF, 1999: 63; Birdsall, 1996).

As Figure 3 shows, countries with the highest proportion of spending on university education (measured as tertiary education spending per student as a percent of GDP per capita) tend to have the lowest primary completion rates. This suggests that the countries with the greatest need to improve primary education may be constrained by the disproportionate amount they

spend on university services. Where this is the case, a country must sacrifice some spending on university services to improve primary coverage. Typically, however, beneficiaries of the university system tend to reject the shift in resources. Throughout Latin America, for instance, attempts to free up resources for primary and secondary education by introducing fees to university students have met with massive protests (Hunter and Brown, 2000).

Organized interest groups can also obstruct educational expansion. One well-known argument posits that organized groups pursue policies that divert resources to themselves, rather than the public good (Olson, 1965). For example, in developed countries, resistance may come from pensioners. Studies have found correlations between large elderly populations and lower education spending, in part because the elderly are well organized and participate politically to protect their benefits. Because most elderly individuals no longer work, they also resist new taxes, which may block educational expansion. The tendency for elderly populations to drive down educational spending has been found on the state level in the United States and on the national level (as the average age of the population increases) in countries such as Norway (Ladd and Murray, 2001; Poterba, 1997; Falch and Rattso, 1997).

This also applies directly to labor unions. McGuire (1999) finds a negative correlation between labor union strength and several human-development indices in East Asia and Latin America, including infant survival and life expectancy. Unions together with actors representing better-off urban

Figure 3: University Spending versus Primary Completion Rates in Developing Countries, circa 2001
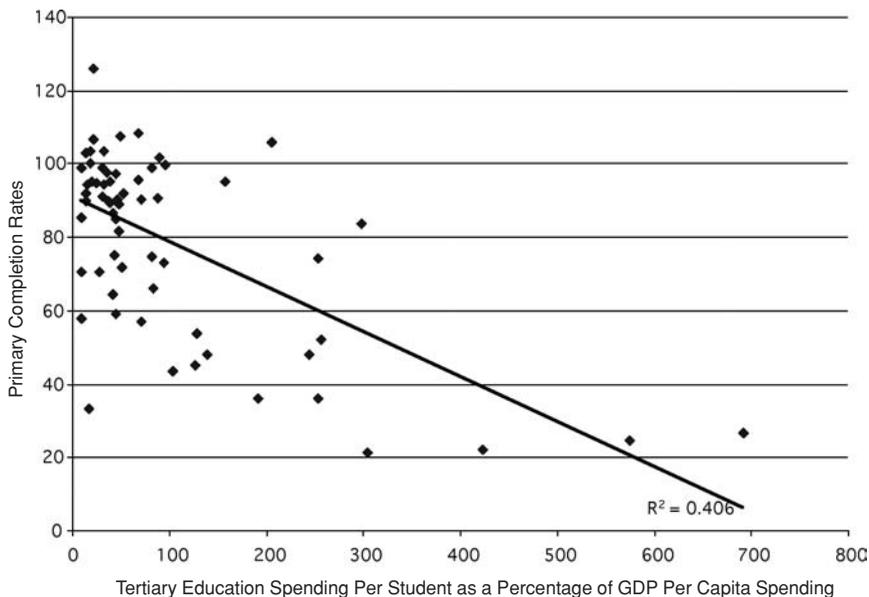
Source: World Bank (Various Years).

Note: Values are for 2001 or the most recent prior year for which data are available.

groups, often induce governments to enact policies that favor the urban and formal sectors to the detriment of both the rural and urban poor. There is reason to believe that in some instances unions may have a similarly obstructive influence on educational expansion, shifting resources away from inputs that promote education (see Pritchett and Filmer, 1997).

The influence of unions probably depends on how much educational expansion a country has already achieved. Teachers' unions are crucial societal advocates of educational expansion in its early stages. More schools necessitate more teachers, which means stronger, larger unions. This is one reason that unions promote educational expansion, and maybe even better learning (see Zegarra and Ravina, 2003). However, in the latter stages, especially if economic conditions are threatening to unions (e.g., overall austerity, declining wages), their preference for educational expansion is replaced by a preference for self-protective policies such as limiting spending to teacher wages, rejecting merit pay or teacher evaluations, and opposing changes designed to generate savings. The self-protective demands of teachers can lead to strikes, which can in turn block educational expansion, generate inefficiencies, and even hurt student performance (see Murillo et al., 2002).

Scholars have examined the conditions that determine whether teachers' unions become cooperative or obstructionist with reform efforts. An important and consistent finding, based mostly on Latin American cases, is that union cooperation is shaped by three factors: how threatening the context is to the teachers' union, especially salary levels and salary increases (see Umansky, 2005); the loyalty links between unions and parties (see Burgess, 1999); and the level of union professionalization (see Crouch, 2005).

Table 6 shows expected union response under four combinations of different economic contexts and loyalty links to political parties. When the economic context is favorable (e.g., teachers' salaries are increasing) and ties to the ruling political party are strong, unions act cooperatively, focusing mostly on obtaining salary demands (quadrant I). If ties to the ruling party are weak or hostile (quadrant III), state-union cooperation erodes, but not severely. The real problem occurs if the economic and policy contexts are threatening to unions (e.g., austerity measures, stagnated salary levels, or policies that mitigate the power of unions). Under such conditions, if the unions and the ruling party lack historical ties (quadrant IV), the likely result is confrontation between the state and unions, possibly leading to a paralyzing political crisis in the education sector. If the unions and the ruling party have historical ties, the likely result is a split among labor, which will be divided on how much to negotiate or challenge the state (see Tiramonti, 2001).

Murillo (2001) focuses on the politics of quadrant II. In a threatening economic context (austerity and market reform) in which leading unions have strong ties with the ruling party, two additional variables shape union response: intra-union and inter-union partisan competition. If there is little internal competition for leadership positions, union leaders will be more cooperative. If competition is stiff, union leaders heighten their confrontation with the government.

Table 6: Economic and Policy Context, Links with Ruling Party, and Teachers' Union Response

	Economic Context or Policy Type	
Links with Ruling Party	**Non-threatening to Teachers' Unions**	**Threatening to Teachers' Unions**
Strong	I. Cooperation, discussion will focus on wages	II. Conflict, unions may split
Weak or Hostile	III. Less cooperation, more strikes	IV. Potential for severe political crisis, unions may unite against the state

Information

Generating societal demand for education—among both high-income and low-income groups—often requires public awareness of the effectiveness (or ineffectiveness) of the educational system. In its summary of many years of theoretical work in economics and political science, the World Bank's *World Development Report 2004* makes the compelling argument that both the quantity and quality of social services depend on the accountability relationship between clients (e.g., in the case of education, parents) and the providers (e.g., school administrators). Accountability requires information. Without clear data on the delivery, quality, and outcomes of educational services, it is difficult for users, administrators, and external observers to make fair evaluations, diagnoses, and prescriptions (Bloom, 2006). Users who lack information about educational choices may simply forgo petitioning for needed services or may make weak, unrealistic, or nonspecific demands that are unlikely to be heeded. Evidence suggests that when citizens are informed of the failings of a particular education system, they can compel politicians to pay attention to the education sector (Reimers and McGinn, 1997). In short, without information, demand for more or better education will falter.

One of the most astonishing ironies in the field of development is that education, the area of state activity most concerned with increasing knowledge among the young, is also an area where the state is keenly reluctant to provide information to adults. The UNDP (2003) found that trend data on information as basic as "net primary enrollment ratio" and "children reaching grade five" are lacking in 46 percent and 96 percent of countries, respectively—17 percent and 46 percent of countries, respectively, lack any data whatsoever.[16]

Information is needed on more than just inputs, such as enrollment and attendance (Bloom, 2006). Measuring outputs such as academic attainment

16. These include developing countries, Central and Eastern European countries, and members of the Commonwealth of Independent States. A country is defined as having trend data if at least two data points are available—one between 1990 and 1995 and one between 1996 and 2001—and if the two points are at least three years apart.

is indispensable. A comparison of poor schools in Chile showed that schools with effective diagnostic tests and systematic monitoring of teacher and student performance achieved higher test scores (Raczysnki and Muñoz, 2004). Yet few developing countries offer these diagnostic tests, and even fewer participate in international testing programs or conduct adequate local testing. One region that has made significant progress in measuring student performance is Latin America; in the 1990s, most nations in this region developed specialized agencies to administer, analyze, and disseminate the results of student tests. Some of these agencies acquired a level of institutional strength sufficient to carry out these tasks, in terms of budgets, cadre of technical experts, and legal autonomy (see Ferrer, 2005). However, it seems that for the most part, these institutional efforts have not bolstered societal demand for more or better education. The reason could be that even in these cases, the data released to the public are still somewhat restricted, which makes it impossible for citizens to make use of available information.[17]

Ideological Competition

Educated elites can advocate for underserved populations, stimulating grassroots demand for education. This may occur as a result of the rise of certain ideologies. If Blyth (2003) is correct in arguing that ideas "change interests" and serve as "weapons in political struggles that help agents achieve their ends," then the acceptance of the education-for-all idea matters not so much because it changes the preferences of states, but because it empowers citizens to place greater demands on the state. Paulston (1977) summarizes a number of arguments that emphasize the importance of "cultural revitalization movements." These are movements of well-to-do citizens who seek to develop a more "satisfying culture." The premise is that elite citizens become disillusioned with the societal status quo, in particular with inequities in the distribution of benefits, and feel that improvements are both possible and urgent.[18]

If this argument is correct, then one should expect to find that high levels of inequality in a particular society give rise to revitalization ideologies among elites, and thus increase political pressure for universal education. As elites become more outraged at inequality, their demands for attention to the problem increase. This might explain the surprising finding of Clemens (2004) that the more unequally education is distributed in a particular society, the faster the rate of educational expansion tends to be. It is also consistent with the claim of Kaufman and Stallings (1991) that in post-war Latin America the expansion of state spending tends to increase in highly unequal

17. To the author's knowledge, only Chile provides data that is disaggregated enough (by school) to be useful to parents.

18. This may explain why many radical anti-establishment movements often attract elites, including highly educated citizens, to their ranks and leadership positions. For a recent discussion of how contemporary terrorist organizations (the Hezbollah's militant wing and Palestinian suicide bombers) recruit from both advantaged and disadvantaged groups in terms of both income and education levels, see Krueger and Maleāková, 2003.

societies. Although this expansion occurs along populist lines and not according to efficiency or need, it is consistent with the finding that inequality compels the "haves" to do something, however flawed, for the "have-nots."

Electoral Politics

Competition for political office may also enhance societal pressures for more and better education. In a democracy, beneficiaries of education and other social services compete among themselves to control state institutions. This competition results in alliances across society, and can make education an electoral issue. Candidates may be forced to make promises on education, and maybe even to deliver on such promises. Jensen (2003) and Shefter (1994) show how electoral competition among U.S. political parties generated expansion of social rights (e.g., services for revolutionary war veterans in the early nineteenth century, and citizenship for immigrants in New York in the 1930s). In theory, then, strong competition for office can generate pressures for the expansion of social services, including education.

The best example of the democracy-favors-education argument may be that of Costa Rica (see also the case of Kerala, described in the Appendix). Unusual among developing countries, Costa Rica has been uninterruptedly democratic since 1949, with fairly competitive electoral politics, stable political parties, and almost negligible military spending. Despite its small size, relatively undiversified economy, modest income levels, and rural-urban inequality (see Muller and Seligson, 1987), Costa Rica achieved an impressive education record early on. By 1990, Costa Rica's literacy and primary enrollment rates were among the highest in the world (see Mesa-Lago, 2000). As of 2000, its literacy rates remained among the highest in Latin American countries and far above the average for countries in its income category (Table 7).

If democracy facilitates educational expansion, then the conditions for achieving universal education are stronger than ever, because the number of democracies is historically high. In 1974, there were fewer than 40 democratic countries in the world. In 2002, there were 121—three of every five countries.

Yet the spread of civil and political liberty has not led to across-the-board improvement in education (World Bank, 2003). Costa Rica, for example, does not have impressive secondary enrollment rates (Table 7). The role of democracy in educational expansion may be limited because certain institutional problems, what Keefer and Khemani (2003) call "political market imperfections," can impair the capacity of citizens to demand more social services from the state.

First, the marginal cost of expanding a social service to all citizens—rather than just to the majority needed to win office—may at some point surpass the marginal political benefit obtained by including potential voters. Championing services for the very poor might allow a politician to build a large political base, but to prevail he or she need only obtain the support of the majority of voters plus one (or fewer, if there are more than two contenders). It does not pay to spend money to obtain the support of all citizens when the support of a plurality or minimal majority will suffice. At some

Table 7: Education Achievements in Costa Rica, Relative to Its Peers, 2000

GDP per capita (Constant 1995 US$)			Years Democratic Since 1940**	Illiteracy Rates (% of people ages 15 and above)			School enrollment, secondary (net enrollment rate)		
Rank*	Country	Value		Rank	Country	Value	Rank	Country	Value
1	Argentina	8173.84	20	1	Trin and Tob	1.71	1	Argentina	79.06
2	Uruguay	6419.96	46	2	Uruguay	2.44	2	Chile	74.52
3	Chile	5304.45	43	3	Argentina	3.17	3	Trin and Tob	72.16
4	Trin and Tob	5270.02	39***	4	Chile	4.24	4	Uruguay	69.93
	Upper-Middle	4888.00		**5**	**Costa Rica**	**4.44**	5	Brazil	69.23
5	Brazil	4626.34	15	6	Paraguay	6.73		Upper Middle	68.61
6	**Costa Rica**	**3911.17**	**51**	7	Venezuela, RB	7.46	6	Bolivia	67.34
7	Mexico	3810.04	3	8	Panama	8.13	7	Peru****	62.00
8	Panama	3483.67	6	9	Colombia	8.37	8	Panama	60.35
9	Venezuela, RB	3301.14	44	10	Ecuador	8.44	9	Mexico	58.22
10	Peru	2334.41	16		Upper-Middle	9.00	10	Colombia	56.54
11	Colombia	2288.99	16	11	Mexico	9.46	11	Venezuela, RB	55.32
12	Dom. Rep.	2053.59	18		Lower-Middle	10.00	**12**	**Costa Rica**	**49.49**
	Middle	1898.00			Middle	10.00	13	Ecuador	48.27
13	Paraguay	1773.14	0	12	Peru	10.15	14	Paraguay	46.79
14	Ecuador	1705.06	21	13	Brazil	13.63	15	Dom. Rep.	40.21
	Lower-Middle	1526.00		14	Bolivia	14.85		Middle	N/A
15	Bolivia	952.71	17	15	Dom. Rep.	16.34		Lower-Middle	N/A

Source: World Development Indicators. For the years democratic from 1940 to 1997, values are derived from Mainwaring (1999a). Mainwaring offers a strict definition of democracy, requiring four conditions: (1) the president and legislature must be chosen in open elections; (2) these authorities must have real governing power and not be overshadowed by the military; (3) civil liberties must be respected; and (4) the franchise must include a sizable majority of adults. For the years from 1998 to 2000, the classification is based on the author's estimate using Mainwaring's criteria.

Notes:
* Refers to GDP per capita ranking within the 15 countries in this table.
** Indicates the number of years country was free of dictatorship between 1930 and 2000.
*** Since year of independence, 1962.
**** Latest figure available is 1998.

point, the extent to which political supporters champion the expansion of services to all will reach a ceiling.

More important, the factors that bring a leader into office might be different from the factors that take him or her out of office. Voters might elect a candidate on the basis of promises to deliver education, but might not necessarily vote him or her out of office for failing to deliver. Much will depend on:

• the strength of monitoring institutions: if they are weak, politicians can hide poor performance;
• the overall performance of incumbents: if politicians have other accomplishments, citizens may accept low performance on education;

- the strength of party alignments: voters may place party loyalty before candidate performance;
- the quality and fragmentation of opponents: the opposition may not offer attractive candidates or programs;
- the themes selected by opinion-makers such as the media, commentators and party leaders: if opinion-makers ignore the issue of education, voters may not know how to evaluate the government on this issue.

In short, democratic competition seems to facilitate the appearance of education on a political agenda by bringing the issue to light and generating promises from candidates, but is not a guarantee of educational expansion. Elections often do not provide strong sanctioning mechanisms against incumbents who falter on the delivery of education. Further research is needed to specify the particular institutional features of democracy (e.g., competitive and stable party competition, executive-legislative relationship) that may promote expansion of social services.

FIVE POSSIBLE POLICIES

From the perspective of state officials, political incentives and pressures to promote universal basic and secondary education are weak. The most significant impediments to achieving universal primary and secondary schooling fall into five categories: 1) weak societal demand for education, 2) supply-side failures, 3) inefficient use of resources devoted to education, 4) opposition by those who bear the costs of reform, and 5) weak accountability mechanisms for improving the performance of education systems. Advocates of universalized education must continue to think about policies that can overcome these obstacles. Important lessons can be learned from countries that have succeeded in expanding education despite facing one or more of the obstacles above. For example, as argued above, some countries have expanded education to include even citizens who have not demanded it. Some have expanded even as incomes declined and civil society was threatened—i.e., the expansion of education under authoritarian regimes. Clearly, there are means to overcoming even the most substantial obstacles to expansion.

Some promising policy experiments in educational expansion are discussed below, with one primary example for each category of political problem. The list is not exhaustive, obviously, and none of the policies discussed is a panacea. Nevertheless, they offer reason to be optimistic that more can be done to overcome the political problems discussed in this paper.

To Boost Demand, Lower the Costs of School Attendance
States can reduce the cost to families of sending children to school, thereby stimulating societal demand. When sending a child to school is expensive (i.e., students are responsible for textbooks, school supplies, school fees, transportation costs, or lunch fees), demand for education weakens, especially among the poorest populations.

In Kenya, the introduction in 1988 of a cost-sharing system, where families were required to contribute to the expense of their child's education, seems to have resulted in high dropout rates and declining enrollments (Bedi et al., 2004; Nafula, 2001). In contrast, Malawi quickly achieved universal primary education in the 1990s when the government eliminated school fees: gross enrollment rates jumped from 66 in 1990 to 135 in 1995 (Colclough and Al-Samarrai, 2000). In Brazil between 1994 and 1999, the proportion of 7–14 year-old children enrolled in school increased from 89 to 96 percent, and the number of illiterate citizens declined from 19.2 million in 1991 to 15.2 million by 1998. More so than other programs, subsidies to parents to send their children to school—and keep them there—led to these results. Brazil has nearly doubled its investment in school lunches since 1995 and has offered subsidies to low-income families that send their children to school (*bolsa escola*). Likewise, when Uganda eliminated primary school tuition fees for up to four children per family in 1996, the impact was "immediate and tremendous"; primary completion rates rose from approximately 40 percent to 65 percent by 2001 (Bruns et al., 2003: 45).

Furthermore, if poor households face formidable barriers to completion—e.g., if poor children have access to primary but not to secondary education, if they tend to have higher repetition rates in primary education, or if local school infrastructure is in shambles—parents (and students) may feel that the investment in primary education is pointless, as the child will not have the opportunity to advance (Levine et al., 2003; see also PROBE, 1999). Expanding access to secondary education, reducing repetition rates in primary levels (typically correlated with income level), and upgrading school infrastructure may help expand household demand for schooling in underserved areas. Finally, new research from Mexico and Brazil shows that providing "conditional cash transfers," in which parents receive a stipend in return for increasing their investment in the human capital of their children, can be an effective strategy for achieving two goals: alleviating poverty and stimulating poor household demand for secondary education (de Janvry and Sadoulet, 2005).

To Bolster the Supply Side (State Efforts), Improve State-Level Expertise and State-Society Links

Most education specialists identify "lack of political will" as a recurrent obstacle to educational expansion. Although "political will" is ubiquitous in the literature, the meaning of this term remains vague. It usually refers to situations in which the executive branch devotes insufficient political attention to education, has a low appetite for conflict (and thus change), or devotes attention to education for reasons unrelated to education such as patronage (see Corrales, 1999). To a certain extent, the argument that low levels of political will lead to stagnant educational services is a truism. The argument is nonetheless intuitive, if difficult to test for lack of a standard way to operationalize low levels of political will.

One way to study political will is to think of it in broader terms. "Will" can be defined as the supply-side strength of education reform, which is com-

posed of various measurable factors. Some factors relate to state characteristics. For instance, high levels of ministerial turnover, intra-cabinet disagreement, failure to incorporate technocrats into the ministry, and weak ties between the ministry of education and multilateral organizations are all indicators of weak supply. As Crouch (2005) explains, these factors explain why Chile was able to introduce far-reaching educational reforms in the 1990s whereas Peru faltered.

State variables are not the only components of the supply side. Also important are state-society links. When reformers form strong political coalitions—especially with political parties—the supply side is enhanced. For instance, Jacoby (2000) shows that, despite prevailing demand for change, secondary education reform failed to take hold in Germany immediately following World War II because reformers did not establish links with political parties. In contrast, reforms took stronger (albeit not perfect) hold in eastern Germany after the 1989 collapse of the Berlin Wall, precisely because reformers forged stronger ties with civil society. In a study of Latin American countries, Grindle (2004) shows that countries whose ministers spent considerable time building cross-sectoral alliances were able to push for educational change, even against strong political opponents. Corrales (2004a) shows that the strength of the supply side, defined in terms of state and state-society variables, explains variation in levels of reform (significant in Central America, moderate in Argentina, insignificant in Peru) in Latin American countries where administrations were equally committed to market and state reforms.

Bolstering the supply side of education reform—that is, the political will to reform—involves strengthening both state capacity *and* societal inclusion. Yet inclusion is costly, and not only in terms of time and resources. To include and accommodate a key societal actor, reformers may also need to sacrifice certain policy goals. Furthermore, insistence on societal inclusion can be lethal to a reform—some groups may remain resolutely opposed to change and use inclusion as a way to sabotage policy changes. The determination of an appropriate balance of compromises in policy and social inclusion is a challenge for both scholars and practitioners.

To Improve Efficiency, Generate More Performance Indicators

Traditionally, the role of the state has been to provide services and to mitigate societal inequities. It is also necessary to see the state in a new light—as the generator and disseminator of information. States in general fulfill this role only grudgingly or limitedly. In education, most statistics provided by the state relate to inputs (e.g., coverage and finance). International organizations deserve credit for pressuring states both to collect this information and to adhere to standard methods of measurement. Further work needs to be done in two areas. First, countries need to improve the quantity, accuracy, consistency, and reliability of the basic data on educational inputs that are already collected. Second, states need to collect and disseminate data on other aspects of the education system—indicators of student, teacher, and school performance.

Performance data can play a crucial political role in education reform. By bolstering the empirical foundations of their arguments, data strengthen the political position of reformers. Data can enable specialists to make more precise diagnoses of an education system's failings. Information on school performance can also help citizens to evaluate the validity of claims made by state officials, in turn enhancing the quality of local debates.

More can be done to encourage states to generate school, teacher, and student performance information. This will require more testing, which can be difficult to institute, as well as dissemination of results, which is even harder to implement. Political resistance to the dissemination of education data is pervasive at all levels—within bureaucracies, teachers' unions, and schools. Leaders, administrators, and teachers fear that performance information will embarrass them and be used as ammunition to attack them. Because of this resistance, states need assistance from international actors to implement more testing. Newly emerging international nongovernmental organizations that hope to influence education policies could make increased testing a central lobbying issue.

To Contain Opposition, Compensate Threatened Actors

Although educational expansion increases spending, which produces more beneficiaries of government services, it may also involve direct costs to other beneficiaries. Policy-makers may want to consider ways to compensate those who bear the cost (Robinson, 1998) or whose benefits are reduced, in order to reduce opposition to change. In the 1990s, Chilean officials followed this approach by avoiding strict social-spending targets—i.e., they allowed low-middle-income groups, and not just the very poor, to continue to receive state assistance (Ruiz-Tagle, 2000). In doing so, they maintained both social peace and electoral victories.

Educational expansion can also create a cost for teachers if it entails a requirement that teachers increase their productivity. Increasing labor market flexibility and establishing merit pay inject efficiency and accountability into education systems; however, these changes penalize teachers directly, through the loss of benefits such as guaranteed employment and promotions. Some form of protection for teachers, or maybe even compensation, may be necessary to counteract teachers' union opposition.

One policy used to address this cost is to compensate unions with healthy salary increases.[19] This is a tricky issue because recent research by the World Bank, based on data from 47 low-income countries, shows that salary scales for teachers in primary education vary significantly, with some countries paying teachers too much and others paying too little (i.e., many deviate from

19. Studying the incidence of teachers' strikes in Argentine provinces, Murillo and Ronconi (2004) find that after "political alignment between the governor and the union," the most significant variable reducing strike activity is "real wage improvement" and "attendance bonuses." Crouch (2005), using evidence from Chile and Peru, argues that differences in salary improvement explain unions' acceptance or rejection of schemes to provide individual, merit-based bonuses for teachers.

what the World Bank deems an adequate level—namely, 3.3 percent of GDP) (Bruns et al., 2003). This variation in salary scales creates political complications. In countries where teacher salaries are low, the recommended policy is to raise wages; this gives rise to political difficulties with the ministry of finance and multilateral creditors interested in fiscal austerity. In countries where teachers are overpaid, salaries should not be increased, so as to avoid compounding inefficiencies; this decision infuriates teachers who, like most salaried workers, feel underpaid. Either way, adjusting salaries up or down is politically contentious.

Adjusting salaries is not the only complication, as deciding on the criteria for salary increases might also be of concern. Salary increases that occur independent of performance—the case for salary changes in many developing countries—lead to underperformance. Kremer et al. (2004) find that one in four teachers in India's public primary schools are absent on any given day, and they attribute this to lack of sanctioning mechanisms, poor monitoring, and decaying infrastructure (see also PROBE, 1999). Governments may find it hard to introduce sanctioning mechanisms for teachers, in part because unions will resist, but they could experiment with incentive schemes, infrastructure maintenance, and better accountability mechanisms to encourage improved teacher performance.

To Boost Accountability, Develop New Models of State-Society Cooperation

Given the economic constraints and political disincentives that obstruct universal education—especially during the latter stages of expansion—it is unrealistic for the international community to expect states to meet this challenge on their own. The task is formidable, and no state is competent or vice-free enough to achieve this goal without assistance. One of the most innovative developments of the post-war twentieth century was the rise of new international actors willing to assist states in the delivery of education (see Benavot and Resnik, 2006; Weiler, 1984). Although this innovation pushed education to new heights in many countries, it will not be enough to achieve universal education. States need further help.

The only other prospect for assistance is from civil society. Small efforts to incorporate more assistance from civil society have been attempted in the twentieth century, with what seem to be promising results. Although state-society partnerships are complicated and easily corrupted, they can have a positive impact on educational expansion.

One can imagine different combinations of state and societal inputs in an education system. For the sake of simplicity, I consider only two types of input—school management and education finance. Table 8 identifies three possible levels of state input and three possible levels of societal input. Cells A through I provide examples.

Education in secular states is typically conceived as relying on the state to move from cell A, where there is zero education provision, to cell C, where presumably the state meets all of society's educational needs. However, as argued, states in developing countries seldom have the resources and incen-

tives to travel this far. Furthermore, it is not clear that an exclusively statist system is desirable, given all the problems that arise from excessive statism. Cell C is thus unrealistic and undesirable.

Cell G represents traditional thinking on private education. The state grants nongovernmental organizations the right to offer private education, perhaps with a subsidy. Management, financing, and ownership of the property are private. The main problem with private provision of education is that schools have little incentive to serve needy students.

In moving toward universalization, it makes sense to consider a model of state-society cooperation in which neither exclusive state provision nor exclusive private provision of education predominates. This would entail moving across the two axes by supplementing state efforts with societal efforts (moving from cell C to cells F and I) and by simultaneously supplementing private efforts with more state involvement (move from cell G to cells H and I).

The supplementation of state efforts with societal efforts has characterized Latin American educational systems since the 1950s. States provide most educational services but have allowed a parallel system of private education, which is frequently subsidized by the state (cell H). In 1996, primary and secondary enrollments in private schools in Latin America were 16.4 percent and 23.8 percent (Wolff, 2002: 16); these levels of enrollment save the state some money. Private schools help the state to meet education demand by finding ways to attract students, collect tuition from those who can pay, and save resources for the state by operating more efficiently than public systems (Navarro, 2002). However, as long as these schools remain tuition-driven, with their own particular admission standards, this model of state-society cooperation will not expand coverage universally.

Table 8: Different Combinations of State and Society Inputs (with examples of societies where these combinations are prevalent)

		State Involvement		
		Minimum	Medium	High
Society Involvement	Minimum	A. No educational provision	B. Minimal schooling (18th and 19th century Europe)	C. Statist Monopoly (Totalitarian Regimes)
	Low	D. Home schooling (poorest African countries; war-torn regions)	E. Modest coverage (less poor African countries)	F. Mostly state schools, with very few private schools (East Asia)
	High	G. Minimally subsidized private education (Denominational schools in advanced democracies)	H. Mixed systems with heavily subsidized private education (urban Latin America)	I. Mixed systems with schools of many types; two-way accountability (both state and society actors more engaged in monitoring schools)

Achieving universal education will require alternative forms of state-society cooperation. Educational systems need to be able to harness greater societal inputs—this is the promise of self-managed or community-managed schools.

"Harambee" groups in Kenya are one notable form of self-managed schools. Harambee groups are self-help communities of rural citizens. These groups mobilize resources, provide infrastructure, and manage schools. The number of Harambee schools grew from zero at the time of independence to 1,497 schools by 1987 (Oguyi, 1995: 127). Most of the expansion of primary and secondary education in Kenya since independence has occurred through the efforts of Harambee groups. Therkildsen and Semboja (1995) compare Kenya with Tanzania and Uganda, whose education systems were, at the time of independence, at similar stages of development. Of these, Kenya had produced the most impressive expansion of coverage by 1990 (Table 9). Tanzania relied exclusively on state-run schools; this allowed the government to make huge inroads, but not nearly to the extent that Kenya did. Tyranny-ridden and war-torn Uganda, which had neither state nor private education (cell E) hardly improved. Kenya's remarkable achievement is all the more surprising given that government spending on education remained stable, and at times declined.

Despite these accomplishments, the model provided by the Kenyan experience ought not be emulated. Harambee groups formed and took on educational responsibilities as a result of faltering state initiative. Even in good years, state finance was limited to teachers' salaries as well as some school supplies and milk for students. In other years, the state denied funding even to Harambee groups or tried to control them (Kanyinga, 1995). Harambee groups emerged as a society-based survival effort—in the absence of state help, rural communities organized to meet their educational needs. In this model, society has to finance most education, which is onerous for rural communities and, as most research shows, depresses school attendance. Furthermore, the quality of Harambee schools is inferior to that of government schools.

Another model of state-society partnership is that of self-managed schools, which have emerged in El Salvador, Guatemala, Honduras, and Nicaragua (see Table 10), as well as parts of Brazil and Colombia in the 1990s. Self-managed schools differ from traditional private schooling in that the state provides the entire operating budget for the school (therefore there is no tuition), and differ from traditional public schooling in that school

Table 9: Gross Enrollment Ratios in Primary Education in East Africa, 1960 and 1990

Country	1960	1990	Type of System
Kenya	47	93	Mixed (State and Harambee groups)
Tanzania	25	66	State monopoly
Uganda	67	71	Low State and Society Inputs

Source: Based on Therkildsen and Semboja (1995).

administration is transferred entirely to local organizations typically composed of parents, teachers, and civilian administrators. These organizations are authorized to spend on infrastructure, and, more significant, to hire and fire teachers, as they see fit. In Nicaragua, these organizations also have authority over curricula.

Data show that self-managed schools carry social and academic promise: 1) they boost societal demand for schooling; 2) they expand coverage quickly, especially in rural areas, because state funding guarantees free tuition and parents provide the infrastructure (sometimes offering their homes as teaching facilities if no schools have been built); and 3) they empower civil society, because parents form civic associations to run schools, often in communities where few other social organizations exist. Research also shows that student retention, teacher attendance, and academic achievement seem to improve, or at least do not worsen, in comparison to traditional schools (see di Gropello, 2004; López, 2005).

Although the model of state-funded, society-managed schools has the advantage of combining state resources (which precludes charging tuition) and societal energies (which might promote civil society and society-based accountability), it can nonetheless be plagued with complications, such as corruption and lack of accountability. If the new managers (in this case, par-

Table 10: Alternative Models of State-Society Provision of Education: Latin American Cases in the 1990s

	Public Traditional	Subsidized (Chile)	Self-Managed (El Salvador, Guatemala, Honduras)	Self-Managed (Nicaragua)	Private Traditional
Funding	Public (municipal)	Public (central government)	Public	Public (with capacity to raise private funding)	Mostly private (school fees)
Ownership of Establishment	State	Private	Public (in concession to an NGO)	Public	Private
Spending Autonomy (Infrastructure Maintenance)	No	Yes	Yes	Yes	Yes
Personnel Autonomy (Hire and Fire Teaching Staff)	No	Yes	Yes	Yes	Yes
Pedagogy Autonomy (Modify Curriculum and Select Textbooks)	No	Medium	No	Yes	Yes

Sources: Based on di Gropello (2004).

ents) are not trained or made accountable, or if they are given more responsibility than they can handle, self-managed schools can lead to deterioration of school services. For this reason, this system will work when the state has the capacity to monitor and sanction communities that mismanage funds, and local communities have strong mechanisms for holding school administrators accountable. Herein lies the problem. In most developing countries, these two conditions occur infrequently. This is one reason that enthusiasm for self-managed schools is limited. Another reason for limited enthusiasm is that teachers' unions tend to oppose self-managed schools. They rightly fear that self-managed schools will be susceptible to manipulation by local authorities. They also dread a transformation of the more cordial parent-teacher relationship into a more contentious employer-employee relationship. Overall, teachers' unions may most vehemently oppose the opening of independent schools without union contracts.

In short, universalization will require highly statist systems to find ways to make room for more societal inputs in the provision of education. Likewise, exclusively private systems must make room for greater state regulation, supervision, and resources. These reforms will give rise to new complications and political conflicts. The task is not to shy away from this, but to find preventive and corrective measures.

CONCLUSION: THE CAUSES AND TRADE-OFFS OF UNIVERSALIZATION

This paper has argued that some of the incentives and pressures that push states to expand primary and secondary education are relatively weak or perverse in the last stages of educational expansion, particularly in developing countries. At the international level, capitalism exercises an ambiguous influence, or possibly a meager positive pressure; multilaterals do not have effective oversight or sanctioning mechanisms; and international consensus about the value of education does not always change domestic political institutions, especially at the last stages of educational expansion. At the state level, the political and economic conditions that drove states historically to promote education have weakened. Patronage remains one of the strongest incentives to expand education, but it is also at the root of poor quality and inefficiency. The two most important ingredients to boost societal demand—income levels and organization—are often lacking in developing countries among those who are the last to receive education.

For these reasons, it is unrealistic to expect states—as lone actors—to produce universal basic and secondary education. An exclusively state-driven effort to universalize education presents the opportunity for more political vices to enter education systems. International organizations and societal actors are necessary checks against these unwanted outcomes and can help states overcome the institutional obstacles that limit improvements in quality and efficiency.

There are many research questions that remain to be addressed. Cross-country variations in speed of expansion have been well known since the 1970s; the extent of variations in efficiency is a more recent discovery (see Bruns et al., 2003). These variations in school systems remain largely unexplained. For scholars interested in explaining these variations, this paper offers a word of caution against the tendency, typical among contemporary social scientists, to insist on identifying the "one key variable" that bests explains all characteristics of a system. Not one factor reviewed in this paper seems, on its own, either sufficient or necessary to alter speeds of expansion or degrees of efficiency and quality.

Perhaps it is best to think about the intellectual task ahead in terms of what Ragin (2004) calls "multiple conjunctural causation." This is a situation in which the same outcome can emerge through "*different* combinations" of many explanatory variables, depending on the setting (emphasis in the original). For Ragin, multiple conjunctural causal arguments can even take contradictory forms. One example of this was suggested in the section "International Pressures": in relatively stable countries that have not yet approached the flatter part of the S-curve, the influence of the World Bank can be beneficial and significant; however, in less politically and economically stable countries at the latter stages of the S-curve, World Bank influence may be null or negative.

To reach conclusions about multiple conjunctural causation requires, of course, quantitative studies able to test models specifying interactions among variables. However, quantitative studies on cross-country variations in speed of expansion and degree of efficiency are likely to suffer from an unhealthy ratio of too few cases to too many independent variables. For that reason, qualitative studies, which excel at identifying the origins, trajectories, and alternatives within a set of comparable cases, are equally indispensable.

A second open question relates to the possible trade-off between educational expansion and educational quality. A narrow focus on increasing access may result in inattention to quality. Expanding education without worrying about what or whether students learn is tantamount to merely providing day care. Although keeping children in school is a major accomplishment, especially in developing countries where street life is precarious, we clearly must strive to provide children with more than day care. It is possible, moreover, that increasing the number of students in school could lead not just to the neglect of quality, but also to its detriment. For instance, governments may be tempted to overpopulate classrooms, to expand coverage through merit-blind hiring of teachers, or to carry out indiscriminate bidding on school infrastructure projects. Educational expansion may be financed by taking resources away from infrastructure maintenance. School facilities decay as a result, which leads to teacher absences (Kremer et al., 2004), less learning, and diminished parental demand for schooling (PROBE, 1999). Or, governments may finance expansion by resisting raises in teachers' salaries, which could produce more teachers' union strikes, which hurt both learning and political stability. There is a danger that universal education may lead, para-

doxically, to more education of lesser quality. Research on how best to mitigate this trade-off is needed.

Finally, it is too easy to explain variation in educational attainment by attributing it to family background or the socioeconomic context of the school. In the 1970s and 1980s, research showed the influence of the quality of teaching materials, teacher motivation, and length of instruction, not just family background, on attainment (see Fuller and Heyneman, 1989; Simmons and Alexander, 1980). In the late 1990s, another variable was added to this list: information. Clearly, without adequate information about school performance, no stakeholder in the education system (principal, teacher, bureaucrat, parent, or student) can generate diagnoses about teaching practices that work and don't work. The route to better-educated students could very well be through better-educated adults.

Appendix: Political Competition and School Expansion in Kerala, India

The Indian state of Kerala (population 32 million) has achieved impressive enrollment indicators, which far surpass the national average.

Table A: Schooling Achievements in Kerala, Relative to the National Average

Indicator	Kerala	India
Female school enrollment rate (age 6–17 years)	90.8	66.2
Male school enrollment rate (age 6–17 years)	91.0	77.6
Rural girls never in school (age 10–12 years)	0.0	26.6
Rural population in villages with a middle school	87.1	44.6

Source: World Bank (2003: 44–45).

Political competition, of various forms and at various stages, has played an important role in educational expansion in Kerala.

1. *Religious and Inter-community Competition in the late Nineteenth Century, and the Early Expansion of Literacy.* Well before the large inflow of Europeans into South Asia, the region of present-day Kerala had a significant Syrian Christian minority. This local Christian minority accounted for a disproportionate number of European missionaries deciding to settle in Kerala by the middle of the nineteenth century. To obtain converts, especially among lower-caste Hindus, Christian missionaries established their own schools. Resenting these newcomers, Syrian Christians, and later upper-class Hindus and Muslim minorities, established their own schools to compete with missionary schools. Soon, communities began to lobby the state for funding. The government responded by creating a system of per student subsidies.

2. *Post-Independence Political Party Competition.* Competitive party systems often stimulate the supply of social services and may explain why Kerala devoted more funding to social services than other Indian states. Whereas party competition was limited at the national level because the Indian National Congress Party held comfortable majorities during most of the post-independence period, in Kerala, the Indian National Congress Party faced stiff competition from the local Communist Party. Both parties alternated in office frequently. Furthermore, voter turnout rates in Kerala

(ranging from 72 to 81 percent) were consistently higher than for the country as a whole (ranging from 47 to 64 percent).

3. *Organized Constituencies as Strong Demanders and Defenders of Schools.* In the early stages of party competition in Kerala, several ruling parties attempted to either eliminate community-based schools or to monopolize education. Their goal was to assert state control over society. However, in every case, the electorate responded by punishing incumbents and voting them out of office. The extremely effective grant-in system created in the late nineteenth century generated well-organized constituencies that effectively defended schools from attempts by the state to take control. Jeffrey (1992) documents three important early cases of state officials seeking to establish control; all ended in political defeat (See Table B). As a result of these electoral lessons, no subsequent state official made attempts to curtail school funding or to seek to monopolize the education system.

Table B: Early Attempts by State Officials in Kerala to Monopolize Education, and their Outcomes

Date	State Official	Announced Policies	Result
mid1940s	C.P. Ramaswami Aiyar (Government of Travancore)	Nationalize Primary Schools	Intense opposition from Catholics partly responsible for downfall of Ramaswami Aiyar's administration
1950	Panampilli Govinda Menon (Kerala Education Minister, Congress Party)	Teachers chosen from government list; fees held in government treasuries	Congress Party loses several by-elections, government falls and Menon dismissed.
1957	Communist Government	Education Act calling for greater government control of grant schools, teachers to be paid and selected by government	Extensive opposition; "liberation struggle" causes fall of communist government in 1959

Source: Jeffrey (1992).

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