

PUBLIC EDUCATION WORKS

LESSONS FROM FIVE CASE STUDIES IN
LOW-AND MIDDLE-INCOME COUNTRIES

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INTRODUCTION

In recent decades, governments have made considerable efforts to provide education for all. However, a large gap remains between international commitments, such as the Sustainable Development Goal 4, and the actual achievement of equitable quality education for all. As a result, certain actors often critique public education as ineffective and inefficient, and thus incapable of addressing this issue. They argue for privatisation as a solution, deeming private providers as more innovative and effective than public ones. However, shortcomings in public education often arise not from lack of capacity, but lack of political will.

This review of examples of public education in low- and middle-income countries shows that, in direct contrast to widely disseminated (and empirically unvalidated) ideas, *public* education can be highly effective, efficient, and transformative and, crucially, it is possible to develop quality public education everywhere.

The possibility is particularly relevant at a time when many have promoted market-based and privatisation policies in education for years, with negligible achievement gains and deleterious equity impacts. COVID-19 has exposed the unsustainability and inefficacy of education privatisation, while inviting us to reimagine education governance. The crisis has revealed the unsustainability of low-cost private schools, with many ceasing operations overnight and leaving students without schools. “High-tech” solutions have also gained traction, temporarily necessary during quarantines; yet their blanket promotion by private companies reinforces education inequalities.

This working paper offers examples that illustrate effective and feasible public approaches. It analyses examples of strong public education across diverse settings – from Namibia to Brazil to Vietnam – examples which pave the way for a pragmatic and realistic transformation in education systems. The research project has also resulted in two additional publications: a research brief that offers an overview of the findings and a policy brief focusing on short lessons for policy-makers and other stakeholders.

The case studies included in this research are not exhaustive: examples of public schools providing a quality education and steering social transformation, often despite serious obstacles, exist in every country. Instead, these examples show that public school systems can be very successful. They inform five cross-cutting lessons learned about supporting strong public education systems. They offer inspiration to educators, citizens, civil society, policymakers, international organisations and donors to renew their efforts for free public education, and move away from the policies of the last two decades focused on private involvement and partnerships, which have largely failed to achieve systemic improvements in quality and equity.

This paper first introduces the need for public education in the context of global commitments to provide education for all, and the growth – and failure – of education privatisation. Second, it presents the case studies, exploring the education and social issues each case addresses, their public approaches, as well as lessons and limitations. Finally, five overarching lessons are drawn from the cases.

THE CHALLENGE AND URGENCY OF PUBLIC EDUCATION FOR ALL

In recent decades, low- and middle-income countries have expanded their education systems to guarantee the right to education for all, often in response to their international commitments to ensure that every person has access to the right to education. Their commitments are either legal and binding, when they have ratified a treaty recognising the right to education, such as the Convention on the Rights of the Child; or political, such as the Sustainable Development Goals (SDGs). Education is directly addressed in SDG Goal 4: ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. It is framed both as a right in

itself and a tool to promote development and reach other SDGs. Countries have made considerable progress in recent years, with total enrolment in low- and middle- income countries reaching 91% in 2015 and the number of children out of school falling by almost half worldwide (MDG Monitor, 2017).

Despite these gains, many countries face limitations – such as low financing, inadequate school infrastructure, lack of trained and experienced teachers, social disadvantages of children, and many others – when trying to incorporate quality and foster equity while expanding access. These challenges have led to little improvement in quality, or to an unequal quality between students attending elite and disadvantaged schools (OECD, 2012). Thus, globally, although more children are enrolled in school, many still do not learn enough. In 2016, the so-called “learning crisis” included 600 million children estimated as not achieving minimum proficiency levels in reading and mathematics, a burgeoning concern for several international organisations (Bookings, 2019; World Bank, 2019; UNICEF, 2020; UNESCO, 2014). Citing these statistics, some argue that public schools offer low-quality services and are unable to “guarantee learning” because low- and middle-income country governments cannot mobilise sufficient financing for social services, leading to a “financing gap” (Saltman, 2018). They dismiss governments as inefficient, expensive, and bureaucratic and are unable to respond effectively to the demands of families.

Instead of considering how to address the underlying issues contributing to this problematic situation, the idea of engaging private providers to improve education access and quality has gained traction internationally (Pedró et al, 2015, Verger et al., 2016). With some variation, the privatisation of education has grown both in Northern and Southern countries, with private actors now active in many areas of education, including service delivery, policy making and financing. Advocates for education privatisation include a diverse range of organisations and individuals, such as international organisations, philanthropy organisations, funders, government officials, businesses and edu-businesses, consultants and thought leaders. These privatisation proponents envision private actors as capable partners to expand and improve education (Ball, 2012), address the “learning crisis” (Gorur et al., 2018), and meet student demand using cheaper solutions. They expect private schools to provide schooling that governments are not able to, or choose not to, offer, reaching remote areas with dispersed public schools or urban contexts with overcrowded classrooms (Heyneman & Stern, 2014; Verger et al., 2017).

The privatising approaches promoted by these actors supposedly leverage competition and choice to create efficiency that, in turn, improves education quality (Adamson & Åstrand, 2016). They include mechanisms like school choice, public-private partnerships, charter schools, high-stakes testing, and results-based financing (Sahlberg, 2016), as well as the direct provision of services via vouchers or low-fee private schools (LFPS) (Srivastava, 2016). Advocates claim that private providers offer “school choice” to meet families’ demands and improve the quality of education through competition between schools. Liberal economic theory supports this belief that competition can simultaneously lead to the reduction of prices and improve both the efficiency and effectiveness/quality of social services (Srivastava, 2016). Some argue that, in practice, families demand private schools (including low-fee schools) due to their alleged higher quality, as it is “assumed with charter schools, LFPS are better managed than public schools, teachers in these schools are more highly committed and, more important in their argumentation, in LFPS, children would learn more than in public schools” (Verger et al., 2017).

Despite the economic rationales and assumptions of superior education provision, international results have not confirmed the merits of education privatisation. These private solutions to education are not new; most have been implemented worldwide for at least two decades and have demonstrated limited and uncertain results at best, and often harmful effects on issues of education equity (Verger et al., 2016). Researchers have identified a series of adverse incentives from these policies, including: schools focusing on attracting students/clients, orienting teaching towards preparing students for tests, narrowing the curriculum, cheating

and fabricating test scores, excluding students that might require more financing (thereby increasing inequity), and “de-professionalising” teaching (Au, 2007; 2010; Ball, 2009, 2010, 2016; Holloway et al., 2019; Verger et al., 2019). These serious, multifaceted issues then corrode education’s role as a human right and its possibility for social transformation.

Instead of pursuing the empirically detrimental distraction of education privatisation, public education can be the way forward for building more equal, just and sustainable societies. This study showcases positive examples of public education that challenge the disseminated idea that public education needs privatisation for quality whilst pointing to a rights-aligned and socially committed definition of quality, which are discussed below.

THE RESEARCH METHOD

This exploratory research project aimed to identify, document and analyse positive examples of public education around the world. The project adopted a deductive approach, first developing working criteria of what constitutes a positive example in public education.

FRAMEWORK OF POSITIVE EXAMPLES OF PUBLIC EDUCATION

The criteria set were developed collectively with researchers and civil society organisations. Overall, positive examples provide clear and concrete examples of an effort to realise the right to education, presenting lessons learned and/or ways to replicate such approaches. Equity, as enshrined in the rights to equality and non-discrimination, is a cornerstone of the experiences. Quality is seen in educational practices, including a broad range of parameters. Finally, as “success” comprises many aspects, the cases do not address and illustrate all elements. The cases thus represent different aspects of “success”.

In order to choose the cases, a “success” framework was formulated, drawing in particular from the understanding of existing human rights law unpacked in the Abidjan Principles on the right to education.¹ The criteria for success were organized in three clusters:

1. **Transversal principles:** these are transversal criteria, and all cases should address one or more of these elements – inclusion, equity and quality (with a social and participatory perspective).
2. **Governance and management:** practices concerned with how education is managed (at school or government levels), namely financing, transparency and accountability, teachers’ working conditions and participatory/democratic governance.
3. **Pedagogy:** practices concerned with how education is delivered, namely a holistic curriculum and a formative assessment.

Criteria	Description
Fundamental principles (transversal)	
Promoting equity	Educational approaches that promote equity and non-discrimination regarding gender, race, income, religion, and others. In practice, they might concern increasing access, participation or offering specific support for educational needs.
Promoting inclusion	Educational approaches that promote the availability and accessibility of education, including excluded children in schools (such as girls, rural children, native populations, children with special needs...).
Increase the quality of delivery with systems/group and/or participatory practices	Educational approaches that have a holistic understanding of quality, and search for systemic, collaborative and participatory solutions to improve the quality of education. Examples might include learning with other schools, implementing interdisciplinary projects, but also engaging parents and local communities in schools and in policymaking.

¹ See more on <http://www.abidjanprinciples.org/>.

Management and governance	
Financing	Educational approaches that mobilise and leverage public financing. They might include the engagement of civil society and campaigning for financing improvement, resulting in solutions that might address tax revenue or expenditure (with greater allocation to education).
Transparency and accountability	Educational approaches that promote transparency and accountability to stakeholders, allowing citizens to be actively engaged in the supervision of their rights. These approaches are often implemented with participatory, monitoring and democratic mechanisms.
Teachers' working conditions and rights	Educational approaches that promote the professionalisation of teachers, which might include respecting and improving working rights (salary, contracts, working hours...), offering training and implementing participatory practices.
Participatory management and governance	Educational approaches that promote the participation of school stakeholders (students, families, teachers, local communities) in decision making, pedagogical projects, evaluations, curriculum, financing, and others, leading to ownership and empowerment. Their participation might concern the governance of schools or policies.
Pedagogy	
Holistic/whole-child curriculum	Curriculum approaches that are focused on a holistic development of children, promoting their rights and dignity and supporting their development as citizens and agents of development and transformation. The curriculum is adapted to local contexts and needs, as well as children's needs.
Formative assessment	Educational approaches that promote a formative type of assessment, not focused on summative evaluations (a focus on outcomes). The assessment can be done with several instruments (not only tests), which are mainly used to support students themselves, give feedback to teachers and help them to provide further support and adjustments, and the school management.

SELECTION OF CASES

Education experts from academia and civil society were consulted to identify successful examples of public education that addressed the developed criteria. Over forty cases were identified² and exploratory research was conducted on them using documentary research and preliminary interviews. The cases were assessed regarding their relevance in relation to the analytical framework and feasibility. The final sample presents cases with a variety of positive practices and geographic diversity.

Six cases were researched and analysed in-depth. The final research report includes five cases (occurring in six countries): Bolivia and Ecuador, Brazil, Cuba, Namibia and Vietnam. Despite the valuable lessons from the sixth case (the Muskaan project implemented in India with support of Action Aid and UNESCO), it is not included in

² Please see appendix 1 for a brief description of some of the interesting cases of public education that could not be analysed for this research project, but which demonstrate potential and merit.

the final report because it required further research.³ Information about this case and others, as examples for future research and analysis, is located in the Appendix.

DATA COLLECTION AND ANALYSIS

The cases were investigated through secondary pre-COVID-19 education data collected from journal papers, working papers, books and book chapters, theses and project reports. The analysis aimed to elucidate the educational issues and challenges addressed by the cases, the cases' public approach to such problems, as well as some lessons that can be drawn from them.

Data collection was challenging at times. Most of the positive examples of public education from low- and middle-income countries are not documented and systematised. Few documents exist which describe how the experiences work(ed) and the results they achieved, and even fewer which analyse these cases to identify lessons and render the experiences significant for an international audience. There is also a lack of platforms that gather these experiences, which would facilitate the detection and study of such cases. Finally, there are also language barriers. The searches were conducted in English, Portuguese, Spanish and French, thus missing out on reports and documents that might be available in other languages. These challenges show that identifying cases and evaluating their relevance and feasibility required considerable effort. The process reveals the urgent need for more documenting and circulating these positive experiences in public education.

To conclude, the case studies were reviewed by representatives of local civil society organisations, as well as peer-reviewed by academic researchers. Furthermore, 13 international civil society organisations have also reviewed and contributed to the writing of the cases and this working paper.

CASE STUDIES

Five case studies offer positive examples of public education around the world and shed light on different aspects of quality public education:

1. The principles of Buen Vivir applied to the educational systems in Ecuador and Bolivia expose how education is thought of as a tool for conceiving and building a new society. They exemplify an alternative indigenous/non-western reasoning applied to education to promote a new form of "sustainable development".
2. The schools of the Brazil's Landless Workers Movement (MST) are an example of increasing education access and quality to rural populations through the work of social movements with the government. The case also depicts the work of a participatory governance that draws from a critical approach, or Freirean pedagogy.
3. The Cuban educational system is an example of the centrality of teachers to promote high education quality with equity, which is based on intense training and support in schools.
4. The education reform in Namibia, which was focused on reforming teachers' training, illustrates how education can be thought of as a tool for social change and how teachers can, and should be, a central element in this effort.
5. The Vietnamese educational system is a case with remarkable performance that is centred on teachers. This case is focused on how accountability can be framed in a developmental way to foster teacher professionalism, instead of performativity.

³ The Muskaan case was initially included in the first policy brief published in July 2021, subsequently updated in September 2021 to reflect the change.

BUEN VIVIR AND INDIGENOUS PRINCIPLES TO EDUCATION IN BOLIVIA AND ECUADOR

INTRODUCTION

Since the end of the 2000s, Ecuador and Bolivia have been implementing an education reform that aims to promote social changes towards more equal, harmonic and sustainable societies. The “Buen Vivir – Vivir Bien” comes from the indigenous concepts *Sumak Kawsay* (in Quechua) and *Suma Qamaña* (in Aymara), which mean a full life, in harmony and equilibrium with nature and the community. It is a way of living, a philosophy of life, a relational cosmovision that connects relationships with others, nature and oneself.

Ecuador and Bolivia have adopted the principles of Buen Vivir in their constitutions, in 2008 and 2009 respectively. Following that, both countries implemented education reforms that were informed by such ideas. Both countries positioned education as a strategic axis for national change and strengthened the role of the state as the main actor responsible for it. This has meant a shift in relation to previous policies and approaches, which were mainly informed by international financial organisations, such as the World Bank or the IADB.

Whilst Bolivia has included the “decolonisation of thinking” as a way to promote cultural change together with the building of a new educational system that promotes improvements in access and completion rates, Ecuador has prioritised policies aimed at guaranteeing the right to education, improving access, and has emphasised management reform to strengthen the governance of the educational system. These new approaches have also constitutionally emphasised the budgetary priority of education, establishing it as the first financial responsibility of the State (art. 77 Constitution of Bolivia) and as a priority area for state investment (art. 26 Constitution of Ecuador). In turn, both constitutions include specific mandates regarding the incorporation (Bolivia) or promotion (Ecuador) of gender equity in education (art. 79 and art. 27 respectively).

This case briefly describes how the principles of Buen Vivir aim to find alternatives to development by drawing from local and indigenous worldviews. It then explores how Buen Vivir has informed education reforms in Ecuador and Bolivia, and lessons that can be drawn from these experiences.

BUEN VIVIR AND NEW WAYS OF FRAMING “SUSTAINABLE DEVELOPMENT”

In the past years, the concept of “sustainable development” has gained prominence in the international fora. International commitments have been set, such as the SDGs, that set 17 international goals that should be reached between 2015 and 2030. Education is amongst these goals and is directly addressed in “Goal 4: ensure inclusive and equitable quality education and promote lifelong learning opportunities for all”. Education is framed both as a right in itself and also as a tool to promote development and to achieve the other SDGs.

At the same time, neoliberalism is still one of the dominant political and economic approaches to development. Development, therefore, is often framed within economic parameters and according to western frameworks and references (Acosta, 2013). To reach the desired “development” level, policies rely on market-based strategies and approaches, including in education. A “new orthodoxy” has thus emerged since the 1980s (Sahlberg, 2016), with a set of strategies and policy instruments – such as marketisation, test-based accountability, school-based management, etc. – that has been internationally adopted. It is assumed that measurable learning outcomes must be the focus and, thus, there is a need for a standardised curriculum with measurable skills and large-scale tests. Competition and privatisation are seen as fruitful tools to improve

outcomes. Therefore, there has been a fast proliferation of strategies that rely on high-stakes testing, vouchers, low-fee private schools, and the reliance on private actors to drive change (Verger et al., 2016).

However, other alternatives to and perspectives on “development” are possible and are being practised, and emerge especially in low- and middle-income countries. One of them, which has recently gained attention, is the concept of “Buen Vivir” (or “Good Life”). Buen Vivir opposes itself to other contemporary concepts, especially linear notions of “development” and “modernisation”. Whilst the latter are mostly connected to the idea of economic development (having social development as a related product of it) that is achieved through the exploitation of natural resources and intensification of consumerism, Buen Vivir aims to foster values from indigenous peoples and is seen as an alternative to capitalist and socialist models. In its more radical definitions, Buen Vivir puts greater focus on nature than on humans, seeing “Mother Earth” as something we are part of, not the owners of (Acosta, 2016).

These concepts have transcended the context of the indigenous peoples and have started to inform policies and national legislations in Bolivia and Ecuador. The Ecuadorian Constitution of 2008 states that the people “hereby decide to build a new form of public coexistence, in diversity and in harmony with nature, to achieve the good way of living”. This “good way of living” (or *buen vivir* in Spanish) is rooted in the worldview of the Quechua peoples of the Andes, of *sumac kawsay*, a Kichwa term that denotes the fullness of life, grounded in community and harmony with other people and nature. The Bolivian Constitution of 2009 recognises Buen Vivir as a principle to guide state action. That same year, Bolivia led the UN General Assembly to proclaim April 22nd as ‘International Mother Earth Day’, and Bolivia’s 2011 Law of Mother Nature was the first national-level legislation in the world to bestow rights to the natural world (Rapid Transition Alliance, 2018). These reforms signal a move towards a developmental approach that prioritises ecological balance and harmony over relentless growth.

BUEN VIVIR AND EDUCATION

In Buen Vivir, education is seen as a right and is centred in the holistic development of people, who live in a complex and multicultural reality that demands continuous education, integrated with nature and ecological consciousness. Education is framed as a tool to transform economic and social structures, as well as a means for cultural affirmation. Thus, it has a strategic role in creating alternative models of society and development, which draw from local values and knowledge, and a decolonial perspective and social project. It is part of the creation of a “society of Buen Vivir” (Ecuador) and the Plurinational State and Vivir Bien (Bolivia).

As a result, the meanings and goals of education are shifted towards principles of equality, equity, interculturality, “pluri-linguism”, national sovereignty, regional integration and strategic insertion in the international arena with equal conditions (not a subaltern position), in contrast to the neoliberal worldview (Crespo, 2012). In practice, there is a strengthening of the public and of relationships between the state and social movements, social organisations and indigenous peoples. All of this is opposed to a view of education as a means for productivity that is subordinated to economic growth and “development”, internationally implemented since the 1980s.

Thus, some of the central principles of the education for Buen Vivir are: it is a political/pedagogical project, with no intent of being “neutral”; it must offer education for all, recognising people’s rights and working for inclusion; it is a contextualised education, connected to the territory and historical knowledge; learners are active agents in the learning process; and it recovers a positive identity, collective/historical consciousness and values (Croce, 2018).

EDUCATION REFORMS IN ECUADOR AND BOLIVIA FOR SOCIAL CHANGE

The reforms of education in Ecuador and Bolivia, drawing from the principles of Buen Vivir, illustrate southern alternatives to education. In these cases, education is an indispensable condition for advancing Buen Vivir and the creation of a new way of living together, of citizenship, in diversity and harmony (Preámbulo de la Constitución del Ecuador, 2008). Education is thought of as a means for learning how to live in society and to create the political, social and economic pillars for the society envisaged by the Constitutions. It is a way to create a new form of relating to nature and society, and interculturality is a central aspect of education.

Both countries had previously implemented policies supported by international and multilateral organisations, especially the World Bank and The Inter-American Development Bank, focused on efficient and outcomes-based management, and thus went through a policy direction shift. Education became recognised as a lifelong right of the people, with the aim of eliminating inequality; public education makes the commitment of universal offer and free of charge at all levels (including higher education).

ECUADOR

The central policies that steered the education reform in Ecuador were the Plan Decenal de Educación 2006-2015, the Constitución de 2008 and the Ley Orgánica de Educación Intercultural (LOEI). In these documents, education is set as an “intersectoral policy”.⁴ The key goals set for education were to reach:

- Universal education from 0 to 5 years of age, as well as basic education (from first to tenth grade);
- Universal literacy and improve adult education;
- Increase enrolment in higher education, reaching 75% of the population;
- Improve physical infrastructure of educational institutions;
- Improve the quality of education and implement the Sistema Nacional de Evaluación;
- Yearly financing increase by 0.5% of education as a percentage of the GDP, until reaching 6% (Burgos, 2017).

To reach these goals, the Decenal Plan had four axes of action: 1) curriculum, 2) human talent (new structures of teacher training, professional development and career, and training administrative personnel), 3) funding and management, 4) accountability.

To improve access, a central measure was the elimination of access barriers (such as entry exams and fees). The government banned payment by families to schools, which were estimated at 40 million USD in 2011, and the school meal programme was enlarged and grew from the provision of meals for 80 school days to 200 school days (Van Damme et al., 2015). Other policies were implemented, such as the free distribution of books, uniforms and school meals, and schools that are close to homes.

Teachers were placed as fundamental and active agents for education quality. The government created the National University of Education (UNAE) to improve teacher training and the teaching career was reformulated with policies that aimed to guarantee appropriate salaries and career plans (Van Damme et al., 2015). The reform also provided opportunities for professional development for teachers and other education professionals. Between 2010 and 2011, more than 170,000 teachers took at least one training course made available at the time (Van Damme et al., 2015). The education for “interculturality” is central in the reformed education of Ecuador. It is understood that inequality in Ecuador is connected to the exclusion of ethnic groups

⁴ Mentioned in the Sistema Nacional de Inclusión y Equidad Social (Art. 340. Constitución de la República del Ecuador 2008), and the Plan Nacional de Desarrollo y al Sistema Nacional Descentralizado de Planificación Participativa. It means the government’s welfare policies for children entail action from the Ministry of Education, the Ministry of Health and the Ministry of Economic and Social Inclusion.

and cultures in the country, which are reinforced by education. Thus, new approaches are needed to learn about, understand and value the local types and sources of knowledge (Villagómez and Campos, 2014).

BOLIVIA

In Bolivia, education is connected to the “Search for Buen Vivir” and is described as an “education revolution with a teacher revolution”. The first role of education is to promote the “decolonisation of thinking”. This is a historical attitude of “rebellious” against the hegemonic western knowledge and establishing an equilibrium with local knowledge. This means transforming education to make it “liberating, revolutionary, anti-imperialist, de-patriarchalising”,⁵ and able to “transform economic and social structures.”⁶ It must consolidate the plurinational state and a society based on Vivir Bien with social justice, to reinforce multiculturalism, and strengthen the identity and culture of each indigenous nation and people.

In practice, this was translated into new policies regarding access, curriculum and teacher training. First, to ensure access, the country adopted a conditional cash transfer programme (“Bono Juancito Pinto”) that focuses on students enrolled in public schools. This programme also made public schools more attractive and, together with a growing investment in education and regulation of the private sector, resulted in a greater demand for public schooling and containment of privatisation (Verger et al., 2017). Second, a new curriculum and new training for teachers were established as the central axis of change; both revolving around the de-colonisation of thinking. The curriculum rescues the roots of indigenous knowledge as an exercise in cultural affirmation and epistemic pluralism, and it aims to address historic inequalities and exclusions. Thus, it draws from a critical analysis of the Bolivian context, addressing four elements: 1) The colonial and postcolonial condition of education, with external and imposed approaches and contents, 2) No articulation between education policy and the goal of changing economic dependence, 3) Abandonment of indigenous knowledge, 4) Education solely focused on cognitive development, not connected to national change.

As a result, instead of articulating the curriculum in disciplines, it follows other axes: education for interculturality and “multi-linguism” (philosophy, psychology, values, religions...), education in socio-community values and education for production (languages, computing, social sciences, arts, physical education), and education with nature and social health (natural sciences, biology, geography, chemistry, mathematics, technical education...). These are guidelines that are adapted in different contexts. Each of the 36 nations have a territory, a language and a cosmovision, which must be addressed in a localised curriculum.

Teachers are seen as central in the process of change, unlike previous approaches. There was considerable investment in teacher training, 196 million pesos bolivianos in 27 *escuelas superiores* and 20 *escuelas académicas*. The format was increased from 3 to 5 years – from technical training at secondary level into a bachelor’s degree at higher education. Regarding in-service training, a programme was implemented for public sector teacher in-service training (named PROFOCOM). Teacher training at all levels, including initial, in-service and graduate level is done exclusively by the state. Teachers’ careers were also improved. There was a development of a career plan and a reduction of temporary teachers, from 18% in 2006 to 5% in 2015. With participatory processes, decisions about education are taken locally, with communities. Schools are also organised into groups to facilitate decision making and learning amongst teachers and communities (Burgos, 2017).

Bolivia has made remarkable advancements: formerly excluded indigenous groups were included in schools; the country was declared “free of illiteracy” in 2008 (illiteracy was as low as 3% in 2015, reduced from 20% in

⁵ These aspects are legally established (art. 3 Education Law N° 070 ‘ Avelino Siñani - Elizardo Pérez’), and is one of the dimensions of transformative education.

⁶ Art. 3 Education Law N° 070 ‘ Avelino Siñani - Elizardo Pérez’

1992); financing grew in relation to GDP from 7.09% in 2005 to 8.19% in 2018; school dropout rates decreased from 7.5% in 1985 to 2.5% in 2018 (UDAPE, 2020); 128,226 teachers received computers as part of the professional development policies; 72,688 teachers were trained with a bachelor's degree, and 141,050 teachers were included in the Programme of Complementary Training (Burgos, 2017). Furthermore, there was a reduction of privatisation. The programmes and financing that strengthened and improved public education encouraged a decline in private enrolment. The changes in policy and discourse led to a weakening of incentives for private education, in both supply and demand. The regulation of the private sector also supported this, with the creation of a fee cap that would have de-incentivised the creation of for-profit institutions. Catholic schools were included in the public system, making them more accountable (Fontdevila and Verger, 2016).

LESSONS LEARNED AND CHALLENGES

Although the neoliberal approach has become globalised and adopted by the most influential international organisations – making it the hegemonic approach – there are alternatives. The cases of Ecuador and Bolivia point to different possibilities that emerge from similar principles. Bolivia has chosen a path with stronger political goals and Ecuador has translated Buen Vivir principles into a more technical and public management agenda (at least at policymaking and discursive levels), as argued by Burgos (2017).

The Ecuadorian and Bolivian cases are a reminder of the intimate relationship between education and society, in two different directions. On the one hand, education is seen as a tool to enact a societal project, whilst on the other, it is also a product of this specific social context. Thus, the values, social structures and culture are all reflected, included and valued in the education system and, at the same time, education is planned to work in favour of a desired society. All of this is opposed to current approaches that frame education as a technical matter that can be easily detached from its contexts and local purposes.

In both cases, teachers are central to the reforms. They are seen as active and creative subjects that can enact the desired educational changes. This is done through pre-service training and professional support in schools, improving working conditions and enabling them to improve education quality with the support of peers and local communities. This contrasts with the neoliberal solutions that harm the professionalism of teaching through approaches that reduce teachers to the delivery of standardised curricula, pressuring them with high-stakes testing and competition, and offers them poor working conditions in both private and public schools.

The curriculum aims at developing a new way of living, one that is truly sustainable and committed to social justice, in harmony with nature and society. The curriculum aims to value the knowledge of local populations, opposed to a western-centric curriculum or an understanding that there is a “universal” knowledge that everyone should learn, and that should be measurable. Sustainability is intrinsically connected to new ways of living, based on respect and harmony between people and nature, instead of concepts of “sustainable consumption”.

These cases also exemplify that education change requires a commitment to adequate financing. In both countries, this has been done through formal commitments in policy and the subsequent growth of investment in the sector.

Finally, the case of Bolivia illustrates how the improvement of public education is able to reverse privatisation (at least to a point), by attracting the families that had opted for private schools. This reversal did not depend on the regulation of private schools, but rather improving and strengthening public education, including through adequate financing (Verger, 2016).

However, translating alternative educational and social principles into systems and policies is challenging. Both countries have gone through internal struggles and external pressures. The reform processes did not unfold

without resistance from national interest groups (including some teachers unions), which had different wishes for education (Burgos, 2017). Furthermore, some ideals might lose their transformative potential when translated into formalised systems that must fit into other structures. Implementing a decolonial education within the current scenario creates a series of tensions and contradictions. In Ecuador, for instance, the resulting system kept several characteristics from former structures and is more adept to international trends, such as the use of performance evaluations, which did not break with former policies of competition and so-called “quality assurance”. Such policies did not involve participatory processes. Once standardised measures were adopted, they became equalised with a very narrow understanding of quality (Burgos, 2017, Torres, 2019). Nonetheless, these experiences illustrate how local knowledge and solutions can emerge and offer alternatives to current hegemonic practices.

PARTICIPATORY AND INCLUSIVE RURAL EDUCATION WITH BRAZIL'S LANDLESS WORKERS MOVEMENT (MST)

INTRODUCTION

Brazil's Landless Workers Movement, Movimento dos Trabalhadores Rurais Sem Terra (MST) in Portuguese, is a social movement for agrarian reform that has been fighting for the democratisation of access to land in Brazil since 1984 and has pushed for the establishment of public schools in its settlements. MST has settlements in almost all states of the country (24 out of 26), with about 350,000 families that have occupied unproductive land. The families are organised in participatory and democratic structures for decision making in the settlements, which revolve around different working groups, among which education is a core group that is responsible for addressing the educational needs of all members.

With principles of radical democracy and social justice, its pedagogy draws from Freirean approaches.⁷ The schools, which are part of the public system, are managed in partnership with the community and implement a localised curriculum – usually with local teachers (most are from/live in the communities). The schools also offer education to young people and adults who dropped out of school. These schools are connected to each other in order to exchange experiences, and they often collaborate with universities nearby. The MST is an example of the promotion of education access and inclusion of rural citizens through advocacy for the improvement of public rural schools and cooperation between government and social movement with participatory formats.

This case describes the challenge of ensuring access to quality education to rural populations, particularly in Brazil, MST's approach to this issue, and lessons that can be drawn from this experience.

CHALLENGES IN RURAL EDUCATION

Providing quality education for rural populations concerns both the provision of education as a right and as a tool for social and economic development. All children should receive adequate education, ensuring they have the opportunity to learn and develop as individuals (United Nations, 1948). This is fundamental in reducing social inequality and promoting social inclusion, whilst also promoting the development of rural areas, thus contributing to the national economy (Moulton, 2001). However, offering quality education for rural populations is a challenge for many developing countries. There is often a lack of schools or limitations to offer high-quality teaching due to the lack of trained teachers and adequate infrastructure. The content, planned for urban schools, tends to be disconnected or irrelevant for the rural context (Moulton, 2001).

⁷ Paulo Freire was a prominent educator from Brazil (1921 - 1997), one of the most important and influential writers on the theory and practice of critical education in the twentieth century, and who remains extremely influential today. His core ideas about critical education came from the literacy programmes he developed. Freire proposes a pedagogy of the oppressed, which “ is a pedagogy which must be forged with, not for, the oppressed in the incessant struggle to regain their humanity. This pedagogy makes oppression and its causes objects of reflection by the oppressed, and from that reflection will come liberation” (Apple et al., 2001).

In Brazil, the right to education has been historically denied to rural populations, and, in general, there is little or no access to social services and rights, such as health, education and land (Arroyo et al., 2004). In 2010, approximately 15% of the Brazilian population lived in rural areas (about 29.8 million people). There were close to 80,600 schools in these areas, and half of them had a single classroom, offering only the initial years of primary education. The educational inequality between urban and rural areas is still stark. The average number of school years completed by rural citizens was about half the urban average (3.4 and 7 years, respectively). The aggregate illiteracy rate in Brazil in 2010 was 10.2%, but with 7.54% of illiterate people in urban areas and 24.64% in rural areas (IPEA, 2019). Regarding infrastructure, the inequality persists, as rural schools have less access to adequate bathrooms, libraries, computers and the internet (INEP, 2020).

Furthermore, rural schools have been closing throughout the country in recent years. According to a survey by Marcos Cassin and Luiz Bezerra (2017), published by the Federal University of São Carlos, out of more than 100,000 rural schools that existed in 2002 in Brazil, 17,000 were closed at the time of the study. The systematic closure of rural schools is a national contravention, as the right to Rural Education is guaranteed by law – both constitutionally, as per the Rural Education Policy, and through the National Rural Education Programme (Procampo). The contradiction persists as the access of rural populations to differentiated education is denied by the lack and/or precariousness of schools (Andrade & Rodrigues, 2019).

Education for rural populations is related to other countryside issues, especially land concentration. Data from the 2006 Agricultural Census conducted by the Brazilian Institute of Geography and Statistics (IBGE) shows that, in 2006, 50% of the smallest farms occupied 2.3% of the total farm area, whereas 5% of the largest farms occupied more than 69.3%. Brazil also has one of the highest rates of unproductive land in the world, despite the large number of people demanding land (Reydon et al., 2014). Although this should be regulated and monitored by the government, these lands are left unused for decades.

Private alternatives have gained attention in the last few years to expand access to education. Namely, LFPs have emerged as a solution with little or no investment from the state. Some proponents, such as Tooley (2013), argue that poor communities, including rural ones, do not need state intervention because they can organise services themselves and even enjoy better-quality schooling in this way. It is also argued that profit is a good incentive for school owners to deliver quality education to the poor, and that profit does not need to work against affordability (Verger et al., 2016). International organisations, such as the World Bank, have promoted LFPs with the idea that they can address government failures and provide an efficient solution (Verger et al., 2016). Other organisations in the international aid community have been supporting this idea with a focus on widening access in response to international commitments, such as the United Nations Millennium Development Goals (MDGs) and the SDGs, especially concerning low-income countries (Srivastava, 2016).

However, rural areas might not offer sufficient profit motivation for private providers, given the low number of students in a given area. Furthermore, some studies have shown that, in places where there is a lack of schools, parents often do not send children to LFPs as a first choice. Instead, the motivation is often the perceived lack of decent free public school alternatives close enough to their homes (Heyneman & Stern, 2014).

In response to this situation, rural populations have been organising themselves to have their rights protected in Brazil. The MST is one of the largest social movements in the country, which identifies unproductive lands and starts farming them, in the hope of having the settlements subsequently legalised. With a holistic understanding of development, welfare and community building, the MST works for the lifelong right to education. The schools opened in the settlements offer early years education, literacy for adult workers, access to universities and the right to an education that values and respects their own knowledge and culture. They address the inclusion of excluded groups and frame the quality of education with a broad social meaning. This

rights-based approach depends on the mobilisation of social movements and their work with the state (McCowan, 2003).

THE MST'S APPROACH: PARTICIPATORY GOVERNANCE AND CRITICAL PEDAGOGY

In response to a continuous situation of precarious schooling that has been unassisted by the state, rural movements⁸ started to pressurise the state with political advocacy in the National Congress and social activism for policies that were specific to non-urban populations. This work contributed with the development of policies and guaranteeing of rights in the countryside during the 1990s, and now *educação no campo* (education for and by the countryside) is a category of formal education in itself, guaranteed by the legislation (Barbosa, 2017).

The MST schools are an example of the expansion of access and inclusion of historically excluded rural populations in formal education, with a localised and adapted form of schooling that depends on the active work of rural social movements and organisations. These schools illustrate the resistance, struggle and political organisation in defending the right to education in the countryside. Teachers and educators aim to frame the countryside as a place of knowledge production, advocating for policies that guarantee an education that is public, secular and of quality.

COMMUNITY ENGAGEMENT AND COOPERATION WITH GOVERNMENTS: THE PROCESS TO OPEN AND MANAGE RURAL SCHOOLS

In the 1980s, the families that started to create settlements considered that the struggle for land was not enough, and policies for the development of the territory were also needed. Since then, once a settlement is created on unproductive land, a school is created (in case one is not available nearby). The families look for support from local government authorities to open a new school. Thus, the MST schools are part of the public system and follow the national curriculum framework. The schools installed in the settlements and camps are not part of the movement, but public facilities linked to the states and municipalities, as well as other rural schools. These schools follow the rules of local education authorities, but have the particularities of each region, according to the territory they are inserted in (MST, 2019). Teachers are hired by the government, and teachers from the settlement that do not have formal training⁹ usually receive funding to attend higher education (Tarlau, 2019).

At the same time, the new school is guided and supported by the MST, which already has its method of teaching, organisation and management, further explored below. Thus, the strategy of the MST involves a collaboration between social movements and governments, a co-governance (Tarlau, 2019). This is not a privatising action, in which communities create independently run schools, but rather a movement, politically engaged and organised, that connects the needs, demands and solutions from citizens to public schooling.

EDUCATION APPROACH: PARTICIPATORY GOVERNANCE AND LOCALIZED AND RELEVANT CURRICULUM

Reflecting its worldview and social goals, MST schools have an educational approach that draws from the Freirean “popular education”. It aims to combine theory and practice, focused on local realities, based on

⁸ Besides the MST, other movements have been active in this effort, such as Confederação Nacional dos Trabalhadores na Agricultura (CONTAG), the Movimento dos Pequenos Agricultores (MPA) and movements of indigenous, *quilombolas* (former slave settlements) and *ribeirinhos*

⁹ The schools often start without formally trained teachers, and the educational activities are led by the few qualified teachers among the landless and committed educators from towns nearby.

humanist and collaborative principles, aiming to create critical citizens that can enact social change (Machado, 2014). Such principles are clearly articulated in MST guidelines. Some of the core aims are: teaching children how to read, write and analyse the social context; teaching by doing, in practice; working to create change; preparing students for both manual and intellectual work; teaching about the local and general reality; creating active historical agents; having a holistic approach to life (MST, 2005). As for the pedagogical principles, they describe that everyone should participate in all aspects of education, working, organising and mobilising, and participating. In other words, it aims to create “conscientiousness”, or a critical understanding of the social reality that people are embedded in, and how they can enact change.

Regarding the curriculum, schools must follow the national guidelines, but schools and teachers adjust the content to local needs. Teachers can create new subjects and teach traditional ones with connection to the local reality (Santos, 2013). For instance, students can learn about agricultural and environmental practices, in which they visit and learn about the crops. They also learn about the peasant culture and participate in cultural and political events. The school calendar is also modified, respecting the settlement’s events, including the crop seasons (Tarlau, 2019).

Concerning governance, it follows the principles of a democratic and participatory governance. MST’s understanding of participation goes beyond the involvement of parents in children’s schooling through volunteering or having input on the curriculum. Participation is based on the movement’s ideal of radical democracy (McCowan, 2003). Community members are actively engaged in the management of the school, both through formal and informal channels. For instance, they organise committees, which participate in the local decision making, and also connect the community with government representatives, monitoring policies, presenting demands and pressuring for change (Santos, 2013). It is understood that, in order to prepare people for democracy, it must be lived, experienced and enacted in education itself (McCowan, 2003).

Finally, the MST creates partnerships with universities to offer training for the educators. The MST has its own training system, and the movement also mobilises to pressurise local authorities to provide training and courses in universities nearby.

Although these social movements have secured policy advances, the implementation of these rights is a continuous struggle and movement of social-political engagement. In every new settlement, the community engages with local government authorities to pressurise them to fulfil their legal obligations, while also articulating social movements to promote change and policies for the rural territories.

SOME RESULTS

The MST is a very large organisation, with more than 9,000 settlements, in which 933,836 families live. In 2019, there were about 1,500 MST schools, of which 1,100 were recognised by local authorities, and these schools employ around 4,000 teachers. Currently, around 200,000 students access education through these schools. MST schools are known for offering schooling of considerable quality, which has been recognised with some prizes, such as an award at the 2017 Sciences Fair in the state of Santa Catarina (MST, 2017). They have also performed exceptionally well in the national exams (MST, 2018).

Young people and adults are also included in these schools. The National Programme of Education in Areas of Agrarian Reform (PRONERA in Portuguese) is jointly managed by the government, social movements and universities. It has provided education for more than 160,000 young people and adults, with 320 courses that involved 82 education institutions addressing the demands of 38 social organisations (IPEA, 2015). PRONERA has its own curriculum that prioritises peasant culture and needs, and challenges the neoliberal format of education (Fernandes and Tarlau, 2017). The Cuban method *Sim, eu posso*, is another initiative implemented by the MST for adults. It was first adopted in Brazil by some municipalities in 2006, and later, in 2007, by the

MST. It has since been implemented in several states, such as Bahia, Ceará and Maranhão.¹⁰ In Maranhão, for example, over 20,000 adults have benefited from the programme.¹¹

LESSONS LEARNED AND CHALLENGES

The MST schools have been very successful in expanding education access and offering quality education to rural populations. Furthermore, their approach is a remarkable example of participatory governance, in engaging local communities and governments, which can inspire policies and solutions for rural and urban areas.

First, the MST schools exemplify how social movements can actively propose solutions and collaborate with governments to promote access to education, especially in rural areas. This approach addresses the lack of schools and the absence of quality in rural areas, combining the organisation of social movements with policymaking.

Second, the participatory approach that foment this collaboration with the beneficiaries is fundamental for a relevant education. It is by engaging with the people who actually live on the settlements that new and relevant solutions emerge. This approach advances a radical democracy that is lived in and through schools. This is in sharp contrast to neoliberal approaches that are characterised by a view of students and families as consumers (McCowan, 2003). In this case, the only “participation” that takes place is a consumerist one, in which parents can choose the school in which they will enrol their children, rather than citizens achieving freedom through participation in the political sphere.

Finally, although international organisations have been encouraging partnerships to ensure the right to education for all, there is an assumption that these partners are private partners. In practice, governments tend to partner with large philanthropic organisations or for-profit companies, such as low-fee schools (Verger et al., 2016). This case illustrates how, instead of using private providers to expand the access to education, governments can collaborate with local groups and social movements to expand the offer of education for rural populations, ensuring access and inclusion.

Despite the advances and lessons, the MST case and the countryside education in Brazil face challenges. Since 2016, rural schools have been closed, mostly due to the austere investment cuts that have resulted in the violation of the right to education. The relationship between the movement and governments often involves tensions and disputes, and positive outcomes depend on having governments that are more open to dialogue with social movements. However, the case offers inspiring lessons concerning participatory forms of governance for a transformative education.

¹⁰ <https://mst.org.br/tag/sim-eu-posso/>

¹¹ <https://www.educacao.ma.gov.br/sim-eu-posso-executado-no-maranhao-e-referencia-nacional/>

EDUCATION QUALITY AND EQUITY IN CUBA

INTRODUCTION

Cuba has a national education system that is internationally recognised for its quality and equity, with high performance in tests and universal access (Carnoy, 2014). Education is seen as a right, as set out in the Constitution, and educators are well trained and supported by schools, principals, the government and the local community, following national policies and guidelines. In the Cuban case, education is embedded in a socialist system, with a series of policies for both education – such as a heavy investment in education since the 1960s – and other social areas, such as guaranteed employment for all, universal quality health care and other policies focused on children. The long lasting and universal social policies and the overall education of the population contributes to a positive cumulative effect in children's schooling.

This case study first presents the challenge of providing universal quality education with equity, followed by Cuba's approach that includes robust investment and a focus on teachers through training and participatory accountability. Despite the limitations of the case, related to the country's regime, Cuba's approach to universal quality public education offers valuable insights. The case is thus concluded with some lessons and limitations of the Cuban experience.

THE CHALLENGE OF QUALITY PUBLIC EDUCATION WITH EQUITY

In the past decades, low- and middle-income countries have been expanding their education systems to guarantee the right to education for all. However, many have faced the challenge of incorporating quality and fostering equity in the provision of education. When financing and governance are not adequate, there is a risk of declining quality with the growing enrolment, or having a difference in quality between those students attending elite schools and those attending disadvantaged schools (OECD, 2012). However, combining quality of teaching and equity is fundamental for the protection of rights and the promotion of sustainable development.

The current Cuban education system has its origins in the Revolution of 1959, which established education as a tool for nation building with cohesion and equality (González and Velázquez, 2009). The new regime considered that universal free education was a right and a tool for national development.

Today, the Cuban education system has impressive results.¹² For instance, the international study on primary education carried out in 2008 by the Latin American Laboratory for Quality Assessment of Education and sponsored by UNESCO, showed that Cuba obtained the best results among the 12 countries in the region (Valdés et al., 2008). Cuba has universal school enrolment and attendance; nearly universal adult literacy; proportional female representation at all levels, including higher education; a strong scientific training base, particularly in chemistry and medicine; consistent pedagogical quality across widely dispersed classrooms; equality of basic educational opportunity, even in impoverished areas, both rural and urban (Gasperini, 2000, p. 7).

¹² Cuba does not participate in the Program of International Student Assessment (PISA) test, or the Trends in International Mathematics and Science Survey (TIMSS). However, it has participated in other tests, such as the Latin American-wide UNESCO 1997 Laboratorio Latinoamericano de Evaluación de la Calidad de la Educación (LLECE) test and the 2007 Segundo Estudio Regional Comparativo y Explicativo (SERCE), and has been the object of comparative studies, such as the ones conducted by Carnoy (2007, 2016).

CUBA'S APPROACH: SOCIAL POLICIES AND TRAINED TEACHERS TO PROMOTE EQUITY AND QUALITY IN EDUCATION

Cuba's education system has advanced based on many elements, which have been the object of studies and debates. Some aspects have been often highlighted as central ones, such as robust financing and intersectoral policies. Furthermore, teachers are at the centre of the system, with intense pre- and in-service training.

NATIONAL EFFORT TO EQUALISE ACCESS AND QUALITY WITH FINANCING AND SOCIAL POLICIES

Aiming towards social equality, education has been set as a priority. Cuba has had sustained high levels of investment in education in a comprehensive and carefully structured system that is embedded in other social policies that promote social equity. Regarding financing, it has increased education financing from 7.14% of GDP in 1991 to 12.84% in 2010¹³ (UNESCO, n.d.), which far exceeds the global education financing benchmarks of allocating 4% to 6% of GDP.

Universal access to education was part of the country's social project of equality. Thus, it promoted a large-scale effort to equalise access and quality across schools in urban and rural areas since the start of Cuba's educational reform in the 1960s. A National Literacy Campaign was launched in 1961, when, at the time, there was a total population of 5.5 million people among which illiteracy affected 23.6% of those over 15 years of age, and in rural areas it reached 40%. During the same year, Cuba was declared free of illiteracy (Rodriguez, 2011). This advancement opened the way for plans of cultural and educational development that followed (González and Velázquez, 2009). By the 1980s, universal 10th grade education had been achieved. Curriculum reforms also aimed to equalise standards of student performance, and teachers have been specifically trained to teach children in rural areas and those from the working class in urban contexts. As a consequence, Cuban students experience considerable equity regarding social class in their educational conditions (Carnoy, 2016).

However, this effort towards equality is not done in and through education alone. This is attained firstly through adopting an intersectoral approach to social issues, including education as one area amongst other social sectors and policies. Education is part of a wider effort to reduce social inequality, at the same time as benefiting from a more equal society. With universal health care, secured employment and housing, there is less inequality and extreme poverty. This has ensured access, quality and the reduction of illiteracy. One of the results is that very few children work in Cuba (the Cuban legislation prohibits child labour and establishes 17 years old as the minimum age of employment). Therefore, there is a historical cumulative effect with parents and teachers being more educated, resulting in better education for all. Cuba exemplifies how education is not isolated from other social areas and policies, and is unlikely to drive social development on its own (Carnoy, 2016).

FOCUS ON TEACHERS

Based on the understanding that teachers are fundamental for education quality, they are at the centre of the education system. This is translated into a career that is socially respected, with intense pre- and in-service training, and school support for pedagogical work.

First, the teaching profession has a considerably high status due to cultural and policy reasons. Culturally, education is a fundamental and prestigious occupation in a revolutionary society. It is understood that education has a central role in creating unity in the nation and supporting social transformation. In terms of policy, Cuba has established fixed incomes so that there is little variation and inequality among professions, and the state provides citizens with basic commodities and services at very low prices. As a result, despite the

¹³ No older or more recent data is available.

very low wages, teaching became a desirable profession. Teachers earn wages of about 300 to 450 pesos per month, or 13 to 18 USD, which is only somewhat lower than physicians. Higher wages are practically non-existent in the country (Carnoy and Marshall, 2005).

Second, the goal of improving education for all, including and especially from rural areas and the working-class population, was to be achieved through the strategy of supplying all schools with well trained and motivated teachers. Thus, teachers receive intense and well-planned training, and they go through a two-year undergraduate course and receive close supervision for feedback and improvement. The curriculum for this training, which is centrally prescribed by the government, is characterised by a strong linkage between theory and practice. Regarding practice, it is focused on teaching the official school curricula using well-developed teaching techniques. Teachers are also prepared to be a social and pedagogical guide to students. Concerning theory, it is built upon education research and theory, with the aim of encouraging student engagement in active and collaborative learning, with a deep understanding of concepts. Finally, with a focus on equity and inclusion, teachers are trained to work in isolated rural areas under difficult conditions. To ensure the stability of the teacher workforce in rural schools, teachers who commit to staying in the area for two or more years receive incentives, such as promotions and assistance (Gasparini, 2000). This approach is in stark contrast to market alternatives of quick solutions for teacher shortage.

Third, teachers are intensely supervised during a long induction period, and receive support from school principals throughout their careers. The administrative teams in Cuban schools are required to act as instructional leaders, which translates into a school culture of directly supervising and assisting teachers in their early years to improve their teaching. This collaborative effort to ensure learning is embedded in a much wider commitment from the state, which assumes the primary responsibility of ensuring the opportunity to learn for every child.

TEACHER-BASED ACCOUNTABILITY AND USE OF TESTS

Finally, accountability is based on an intense relationship between all stakeholders, involving students, parents, teachers and school principals. Primary teachers generally stay with their pupils for the first four years, and sometimes even six years, of primary school, developing a long-term relationship in which teachers get to know students well. As a result, there is a close follow up on students' development and learning, which is not dependent on large-scale tests and the creation of external incentives (such as high-stakes testing).

Nonetheless, tests are used in the country. Cuban municipalities test sixth- and ninth-grade pupils to provide feedback to the ministry of education and to the schools on how well the system is working. Test results are made public for teachers, students, and families, but there are no rankings. They are used for organisational decision making, translating results into actions aimed at more effective education in all schools. The assumption seems to be that teachers, rather than tests, drive improvement (Carnoy, 2016).

LESSONS LEARNED AND CHALLENGES

The education system from Cuba points to some lessons. First, the Cuban case is a reminder and clear illustration of how education is not isolated from other social areas. Although studies have consistently shown a correlation between education outcomes and the income and social condition of the child's household, Cuba exemplifies a country-wide effect on education of reducing social inequality (Carnoy, 2016). With low social inequality and universal welfare policies and services, education improves for all. Thus, "one lesson for all countries is that reducing poverty and income inequality almost certainly means improving student performance in school" (Carnoy, 2016).

This dynamic inverts the current neoliberal solution of trying to use education as a tool to promote development and reduce inequality. If, however, social inequality is not tackled with other policies, countries, regions, or school districts are likely to continue to have difficulty achieving high levels of student learning in school if the children live in a socio-political context outside school that does not provide the safety, health and moral support needed to function well in a classroom environment (Carnoy, 2016).

Second, the Cuban case points to an improvement in education through teachers, not competition or other market-based approaches. Several countries, such as Chile, have attempted to use market mechanisms (such as choice) to drive change, which have not produced more learning. However, the negative aspects of inequality and markets seem to undo the possible positive effects, harming the most vulnerable in particular (Mizala and Torche, 2021). In contrast, Cuba has invested in reducing inequality in the country and in teacher training, which have led to educational improvements.

Cuban teacher training is in stark contrast to the market solutions that argue for fewer teacher certification requirements, with programmes such as Teach for America and Teach for All (Olmedo et al., 2013). Many market advocates consider that certification requirements, required courses and degrees, and other state controls over who can teach, create barriers to entry that impede individuals from entering the profession. This in turn reduces the talent pool, especially in “shortage subjects” such as maths and science. The Cuban case exemplifies how teachers are actually at the centre of education change, and must thus be trained and supported to enact improvements.

Third, teacher accountability is done with support in a participatory way. Although tests are used to monitor the education system and the results are made public, there are no rankings to prevent dynamics of competition and “shaming” schools and teachers who underperform. Teachers are empowered to be effective in their job by good training and constructive supervision. They are not only made to feel responsible for the children they teach, but they are given the skills to turn those feelings of responsibility into high levels of student learning. This is also an approach that is in contrast to internationally disseminated market-based approaches of high-stakes testing. Such approaches hope to create incentives for outcomes by attaching financing consequences to test results, which have been creating a series of perverse effects, such as gaming, cheating, increasing inequality, professionalising teaching and increasing illnesses among teachers (Au, 2007; 2010; Ball, 2009, Holloway et al., 2019; Verger et al., 2019).

This does not mean that there are no limitations and caveats in the Cuban case. Repressive measures by the Government are widely reported, which limit civil and political rights, democratic freedoms are restricted, and education is often placed as a tool to maintain citizens’ loyalty to the regime (Civil Rights Defenders, 2016, Amnesty International, 2020). Furthermore, some of the aspects discussed here depend on wider cultural and political vision, such as Cuba’s efforts, over decades, to create a more equal society, which has created greater equality in schools and elevated the quality of education. Relatedly, teacher recruitment depends on the wider social context of salary regulation and social valuing of education.

Nonetheless, the Cuban case does not offer silver bullets or quick solutions, but rather points to how decades of concerted effort have built up quality education. It indicates alternative ways of offering quality education with equity for all, with consistent investment and focus on teachers.

TEACHERS AT THE CENTRE OF EDUCATION REFORM IN NAMIBIA

INTRODUCTION

After the Namibian independence in 1990, the creation of an education system that would break away from the former one from South Africa became a priority. In contrast to the education that was marked by authoritarian practices that reinforced racial segregation, the new system aimed to promote access, equity, quality and democracy. Teacher training was set as a cornerstone to the reform and aimed to implement a learner-centred pedagogy. The reform and teacher training plan aimed to position teachers as creative agents in schools and essential agents of change for a new educational system.

This case study first sets the Namibian reform within the context of post-colonial countries, which face the challenge of reforming education to respond to the new national setting and needs. It then presents the post-independence educational reform and its focus on teacher training as a tool for building a new democratic nation. Finally, some lessons and limitations are explored.

EDUCATION FOR SOCIAL CHANGE IN POST-COLONIAL CONTEXTS

After becoming independent, many African countries perceived a need to reform their education systems. The former systems were marked by colonial aspects, particularly in the curriculum and teacher training. Thus, new policies were needed as part of an effort to consolidate independence and strengthen the national identity and new democracy (Zeichner and Dahlström, 1999). However, despite governments bold statements recognising the relevance of these reforms, planning, implementing and monitoring has proven to be challenging. Part of the challenge involves financing and finding ways to truly bring about change, instead of superficial shifts in the curriculum that do not tackle the structures that sustain a colonial education (Arreman et al., 2016).

At the same time, since the 1990s education has been thought of as a means for “development”, usually focusing on economic development. The “new orthodoxy” that is being internationally adopted focuses on standardising the curriculum, using large-scale evaluation to monitor performance (often paired with financing consequences, the so-called high-stakes testing) and relying on private organisations (for-profit and non-profit) to reform and improve education (Sahlberg, 2016; Verger et al., 2016). These approaches tend to dismiss the social purposes of education and the critical role teachers play in improving teaching and promoting social change (Saltman, 2015). With a focus on measurable outcomes, teaching is usually reduced to delivering a standardised curriculum and teachers are often submitted to high-stakes testing, leading to an “accountability by numbers” and a consequent de-professionalisation of teaching (Ball, 2003, 2009). This approach also hinders the creation of new education systems and practices that advance the shift from a colonial past.

Namibia is one of the countries to have gone through the process of reforming education after its independence in the recent past. It became independent in 1990, being formerly known as South West Africa, which was part of the South African territory and subject to Apartheid policies. Prior to that, the territory was a German colony. Education, therefore, was designed according to the Apartheid, with teaching that was teacher-centred and schools that were racially segregated with an authoritarian approach. The curriculum was planned according to these values, teachers were not adequately trained and there was no democratic participation in decision making (Angula and Lewis, 1997).

After independence, the vision for the transformation of the education system in Namibia was articulated in the document “Toward Education for All: A Development Brief for Education, Culture, and Training” of 1993. The establishment of a single, national coordinated system was central to this, one which should meet the learning needs of citizens and the reconstruction and development needs of society and the economy.

THE NAMIBIAN APPROACH: TEACHERS AT THE CENTRE OF EDUCATIONAL CHANGE

The change in education in Namibia started before independence. During the war for independence (1966 to 1990), the liberation movement South West African People’s Organisation (SWAPO), organised schools, including teacher training for Namibian refugees in various African countries. A three-year programme, the Integrated Teacher Training Programme (ITTP), was set up in a refugee camp in Angola in the mid-1980s. The ITTP was conducted according to the pedagogical idea of learner-centred education (LCE), and served as the model for postcolonial teacher education reform with the overall idea of preparing future teachers for democracy and social change in the new independent nation of Namibia (Dahlström, 2002).

The Namibian education reform, and its new format of teacher training, was supported by international organisations. Since the liberation struggle, Namibian teachers were sent for training in other countries, such as the United Nations Institution for Namibia in Lusaka, Zambia, and at the largest civilian refugee camp for Namibians in Kwanza-Sui, Angola. The latter was assisted by Swedish educators from Umea University between 1983 and 1989, who continued to collaborate with Namibian educators and policymakers after independence. University educators from other countries, such as Denmark, the US and the United Kingdom have also supported projects.¹⁴

Once independence took place, the education reform was centred around 4 main goals, as established in the document “Toward Education For All: access, equity, quality and democracy” (Dahlström, 1995). Thus, education should have universal access for all, irrespective of race, gender, age, creed, class; redress past inequalities; improve quality, and ensure teachers are well-prepared and develop a democratic education. The education reform was based on a philosophy of liberation, aiming to integrate an excluded majority into the economic and political scene. Education was positioned as a means for promoting social equity and opportunities for all (Angula, 2019).

Teacher education was treated as the centrepiece of the national educational reform, and it has gained attention in the international context. Teacher training was seen as fundamental to break the “cycle of authoritarianism and inequities that existed in schooling prior to independence in 1990” (Zeichner and Dahlström, 1999). In 1992, the new national programme for teacher training was created with the Basic Education Teacher Diploma (BETD) (Dahlstrom, 1995). The focus on teachers contrasted with the teacher education reforms implemented in other countries, which treated it as an appendage that follows efforts to affect change in schools (Samoff, 1998).

This new programme connected the knowledge gained from the educational experiences during the liberation struggle, with critical pedagogy and reconstructive ideologies of education (Zeichner and Dahlstrom, 2000). The BETD promoted student-centred pedagogies, aiming to attend to the goal of quality, expressed at the Toward Education for All policy. Learner-centred classrooms should be interactive and exciting, which requires a new role from teachers. This meant a shift from an approach that puts teachers as workers who “deliver” a

¹⁴ Thus, despite the research gap that still exists about the long-term effects and current situation of teacher training in Namibia, this case has been fairly documented due to the greater involvement of researchers.

centralised and top-down curriculum, to an understanding that teachers are reflexive professionals that are key to learner-centred and democratic education, continuous assessment, and critical inquiry (Zeichner and Dahlstrom, 2000).

Furthermore, it had a significant part of the training done in schools and initial training was placed as part of lifelong learning. Thus, the BETD employed Critical Practitioner Inquiry (CPI) as part of its pre- and in-service programmes. CPI is an educational approach that draws from critical pedagogy and aims to bridge theory and practice, and in Namibia it aimed to empower teachers to become contributors to the educational discourse (Zeichner and Dahlstrom, 2000). To make sure that the teacher training courses would follow the new guidelines, teacher colleges were kept separate from universities. This aimed at fomenting the new way of working and preventing the conservative faculty from reinforcing a colonial structure (Zeichner and Dahlström, 1999).

Second, the teacher education reform in Namibia differs from the post-colonial education in many African countries that have focused on quantitative indicators (such as more schools and teachers), but not on transforming the character and quality of education, leaving authoritarian classroom practices and structures. In these cases, access is central to the reform, but they do not address quality, inequality and the social purposes of education. In the case of Namibia, the reform aimed to transform practices that emphasised repetition and memory into student-centred ones, with learners as active participants. The teacher training aimed towards reflexive teachers that could question and rethink structures and practices (Swarts, 1999). Relatedly, the curriculum should be relevant and respectful of cultural traditions and communities.

Between 1990 and the early 2000s, the country made great strides regarding education. For instance, enrolment in primary education increased from 60% to 95%, there was a 30% increase in the teaching workforce, and 3,000 new classrooms were built by 2006 (USAID, 2006). Access to secondary education increased significantly. Results show that Grade 12 student enrolment for the Namibia Senior Secondary Certificate Higher level (NSSCH) increased from 904 students in 1996 to 16,308 in 2017. Overall, Namibia has managed to improve its Education for All Development index by more than 5% since 1999 (African Economic Outlook, 2012).

LESSONS LEARNED AND CHALLENGES

In contrast to the understanding that education is a technical matter which is mostly at the service of economic development, the Namibian case is an illustration of how education is connected to deeper and wider social issues. In the context of a recently conquered independence and a transition from the Apartheid, the new country envisaged that education should play a central role in fostering social and racial equality. The former contents and practices were understood to maintain authoritarian and colonial relationships, which had to be replaced by participatory and democratic ones. This is a reminder of how the contents and structure of education are intimately connected to the intended type of society. To move towards more equal and democratic societies, educational systems need to promote and support the necessary social changes.

Second, teachers are central actors in this educational shift. Training and empowering teachers to be the agents of change is fundamental, and it must happen together with other reforms, such as curriculum, evaluation and management. Teachers must advance new classroom practices and relationships with students, which cannot be achieved with other policies on their own, such as curriculum or large-scale tests. Current market-based practices and approaches go against this premise. Instead, they harm the professionalism of teachers by reducing their work to delivering standardised content, training for tests or leaving them in precarious working conditions, thus hindering teachers' possibility of improving the quality of education.

However, in spite of the advances and improvements resulting from both education and other social policies (such as policies for the protection of children), there still are considerable challenges in Namibian education concerning learning outcomes and access. Some studies have indicated that the new teacher training has had a positive impact on teachers, but that it has not affected practice as much as expected (Dahlstrom, 2002, O'Sullivan, 2002, Arreman et al., 2015). Thus, other policies are needed to advance change, continue improving education quality, and tackle teacher absences, poor pupil performance and the inadequate physical conditions that exist in many schools and classrooms (Arreman et al., 2016). There are also research gaps concerning how the Namibian reform was implemented and the long-term impact of the new teacher training programme. Nonetheless, this case points to the relevance of investing in teacher training and empowering them as agents of social and educational change.

ACCOUNTABILITY FOR PROFESSIONAL DEVELOPMENT AND EDUCATION QUALITY IN VIETNAM

INTRODUCTION

Vietnam has been achieving impressive results regarding school enrolment, completed years of schooling and learning outcomes. The case gained international attention after performing exceptionally well in the Programme for International Student Assessment (PISA - 2012 and 2015).¹⁵ Several aspects have created the conditions for such improvement, including economic and political aspects beyond education. As for the education sector, Vietnam adopted a “double approach” of growing access and improving quality, which has been done mainly through increased financing, teacher training and a creation of a framework for accountability (with school leadership focused on pedagogy and parental partnership). The three most important groups of ‘agents’ at school level – teachers, principals and parents – interact locally and, according to regulations, all three are involved in the accountability system that focuses on professional development and quality improvement. However, some tensions and contradictions put at risk the advances made, including privatisation and the use of financial contributions from families that may increase inequality.

The case study first introduces how ensuring quality education for all has been a global issue, often tentatively addressed with market-based mechanisms and high-stakes testing; and how Vietnam has increased access with quality with public strategies. Second, the country’s approach is presented, and finally, some lessons and limitations are discussed.

EDUCATION QUALITY AND ACCOUNTABILITY

In the past years, international political commitments, such as the SDGs, have been signed to move towards achieving the right to education for everyone, as guaranteed by international treaties. As a result of national and international efforts, considerable progress has been made. However, there is an international “learning crisis”, with many children are at school but not learning, which has become the concern of several international organisations (Bookings, 2019; World Bank, 2019; UNICEF, 2020; UNESCO, 2014). To improve the quality of education and ensure learning, market-based approaches have been gaining currency internationally, with support from international organisations and actors. With high-stakes testing, accountability becomes associated with the idea of performativity, of publicly showcasing measurable results. Schools, teachers and students are subjected to rankings, that are often publicly displayed and have relevant consequences (such as impacting financing) that are supposed to create “incentives”. However, researchers have been arguing that there is a series of damaging side effects to these policies. Teaching then centres on preparing students for tests, leading to curriculum narrowing, cheating and gaming, exclusion and increased inequality (Au, 2007; 2010; Holloway et al., 2019; Verger et al., 2019), and the “de-professionalisation” of teaching (Ball, 2009, 2010, 2016).

¹⁵ The Vietnam PISA ranking in 2015 was 8th in science, 22nd in mathematics and 32nd in reading; and in 2018 was 4th in science, 24th in mathematics and 13th in reading.

Vietnam, however, has demonstrated good results in growing access and improving public education at the same time. It has shown a remarkable performance in standardised test scores, school enrolment and completed years of schooling. Vietnam has significantly increased school enrolment at all school levels in the past 20 years and has achieved virtually universal primary school enrolment. Regarding lower secondary levels, enrolment has increased from 27% in the early 1990s (McAleavy et al., 2018) to 99.4% in primary school and 92.3% in lower secondary (MoET, 2017). Girls' enrolment has also improved, with girls' net enrolment equalling and then surpassing boys' enrolment at secondary level (Glewwe and Dang, 2017).

Besides performing well in PISA, even before the publication of the PISA 2012 results, the data indicated that government schools in Vietnam were achieving good academic outcomes in core subjects for many students, with a simultaneous improvement during this period in terms of both access and quality. For instance, in 2001 and 2007, the Ministry of Education and Training (MoET) conducted large-scale national assessments of Grade 5 reading and mathematics, in partnership with the World Bank. The results indicated that the majority of students reached the level of "functional" or above in both areas in 2001 (McAleavy et al., 2018). There was also a significant performance improvement between 2001 and 2007 at a time of increasing enrolment.

Importantly, the education system in Vietnam is relatively equitable, thus poorer children can expect a decent quality of schooling. The OECD suggests that one of the most impressive aspects of Vietnamese performance in PISA is the relatively high performance of disadvantaged children (McAleavy et al., 2018). The OECD describes as "resilient" students in the bottom quarter of the PISA "index of economic, social and cultural status" that perform in the top quarter of students internationally in science. Whilst the OECD average was 29.18%, Vietnam's was 75.51% (OECD, 2016). However, commentators and the OECD itself have urged caution when analysing Vietnam's results, as they should be seen in light of the exclusion of students from the survey. Its sample, thus, makes comparisons and generalisations difficult (McAleavy et al., 2018; OECD, 2016). Further studies and analysis are needed that consider intersectional aspects of inequality, as students in Vietnam have varying performances according to region, ethnic group, gender and income.

Despite limitations in the measurement and in the case itself, the professionalism of teaching is a central element in Vietnam's education system; it depends on an "accountability" system that promotes the professional development of teachers and offers valuable lessons.

VIETNAM'S APPROACH: EXPANDING ACCESS AND QUALITY IN PUBLIC SCHOOLS WITH FINANCING AND ACCOUNTABILITY

To achieve the education results mentioned, Vietnam has adopted a series of policies that have created the conditions for such improvement, some fundamental aspects are explored here, with no intention of offering an exhaustive analysis.

PRIORITY IN POLICY AND FINANCING

Education has been set as a national priority since the 1990s, when the country started its transition from a low-income and largely agrarian country, to a lower-middle income one with a thriving diverse economy (which has a dominating public sector in certain industries, particularly in power and infrastructure). The economic growth increased tax revenues, which was followed with a commitment to invest "20% of all public spending" in education (McAleavy et al. 2018). The investment has been consistently high, but it has oscillated in the past years, from as high as 18.05% in 2008 to 15.24% in 2009, followed by a yearly rise, reaching 18.79% in 2012, and then dropping to 14.47% in 2018 (World Bank, 2021a). As a percentage of GDP, it rose from 3.57% in 2000 to 5.6% in 2013, but fell to 4.1% in 2018 (World Bank, 2021b).

The financing has been invested in the so-called “twin-track approach”. This means that the government has invested in expanding and improving facilities, together with attempts to improve critical factors likely to influence school quality, such as the school readiness of five-year olds and the pre-service qualification level of teachers. First, this has meant investing in new schools and improving the infrastructure of existing ones. Whilst this alone is not sufficient to guarantee education quality, it has contributed to it. Furthermore, it has also created a good image of public schools in society, which foments a perception that public schools are good and disincentivises parents from searching for private alternatives. Second, education policies have been implemented, such as offering at least one year of kindergarten to all, increasing pre-service training requirements for teachers, and it has established accountability procedures that not only promote the monitoring of compliance but, most importantly, the professional development of teachers.

Concerning financing, since the late 1980s, Vietnam has adopted a shared form of education financing, often referred to as “socialisation” (also translated as “societalisation”). After an acute fiscal crisis that strongly affected education and reduced enrolment, a system of formal and informal co-payments was implemented. On the one hand, it has enabled the expansion and improvement of the Vietnamese education system and has reinforced the participation of families in education. On the other hand, it has placed a burden on households, with up to 40% of the public education being financed by households, which can affect equity and exclude some students (London, 2021).

PRE- AND IN-SERVICE TRAINING FOR TEACHING QUALITY

Teacher training has improved in the past years. Namely, teaching has been professionalised, with more teachers being qualified at postgraduate level since 2000. Data from PISA 2015 showed that students in Vietnam were, on average, more likely to be taught science lessons by a teacher with a degree in science than students in OECD countries (McAleavy et al., 2018). Teaching is also a very respected profession in Vietnam, and salaries have improved in the past years. Nonetheless, it is still not well paid. There is therefore a widespread practice of private tutoring, which is an opportunity for teachers to supplement their income. Parents see it as a way to enhance the chance of success for their children in a competitive environment and perhaps gain some favouritism from teachers, despite being discouraged by the government (McAleavy et al., 2018).

The training and professionalisation of teaching are also related to teachers’ freedom to decide upon teaching methods and pedagogy. They are trained and encouraged to apply problem-solving in class, addressing students’ needs, and most apply a mix of traditional and student-centred pedagogies. This, however, is not done in isolation. Teachers receive a lot of support, feedback and mentoring in schools, from peers and superiors. Teachers observe each other’s classes, and offer constructive feedback, which is coordinated by a subject leader.

School leadership is also focused on the classroom and on advancing teaching quality. Principals are experienced teachers (with between 10 to 35 years of teaching) and are school leaders with a pedagogical role. They also observe classes, with a focus on coaching teachers for quality. The feedback is then turned into a development plan for teachers. The prevalence of in-school mentoring in Vietnam is much higher than the OECD average (McAleavy et al., 2018).

ACCOUNTABILITY: SELF-EVALUATION AND FEEDBACK FROM PEERS AND SUPERIORS FOR DEVELOPMENT

All education stakeholders are involved in several relationships and mechanisms of accountability. Teachers receive feedback and support for improvement through these mechanisms.

First, teachers conduct self-evaluations and peer-evaluations, assessing themselves with preestablished criteria set to identify strengths and weaknesses, and develop a plan for professional development. The peer

review process includes classroom observation and evaluation of planning documents, which verifies the accuracy of self-evaluations and helps with planning improvements.

Second, this evaluation is done within and through “subject teams”, in which they provide each other with feedback that offers both challenges and support. Each of these subject groups has a lead, who also conducts observations. The feedback is organised, combining the input of peers and superiors, and is shared with both teachers and the principal. The subject leader, therefore, supports the principal in identifying strengths and weaknesses regarding teaching quality and coordinates the group. The leaders combine a monitoring function with strong orientation towards professional development. The developmental accountability subject group is considered one of the most distinctive aspects of the education system in Vietnam.

Third, school principals play a pivotal role in monitoring the quality of teaching while offering professional development support. Monitoring the quality of classes is regarded as a central part of the principals’ work. They also observe lessons and evaluate planning documents, and the information collected is combined with the report from subject groups.

Finally, parents partake in this accountability system. The education regulation gives parents an important role, though it is not always fully implemented. This relationship should foment a relationship of accountability in two ways, in which parents and teachers keep each other accountable for their roles in children’s development and learning. This is done in formal and informal ways, such as Parent Boards and direct contact between parents and educators. The Parental Board plays a role in the school, and it is legally responsible for providing feedback regarding quality and organising extra-curricular activities. Parents report high levels of satisfaction and trust in teachers’ work and professionalism. There are also high levels of volunteering in schools, according to the PISA data (p. 92). As mentioned, this is likely to be connected to the policy of “socialisation”, or the co-financing practice adopted in Vietnam, which in turn do pose the risk of increasing inequality (London, 2021).

EXTERNAL ACCOUNTABILITY: MONITORING QUALITY BEYOND MEASURABLE RESULTS

Besides this intricate system of accountability at school level, there are also mechanisms of external accountability. There are “peer-review” opportunities for feedback between schools, with both formal and informal mechanisms to allow for principals to exchange comments and support. Representatives from the bodies that monitor schools also hold regular meetings with principals and conduct school visits for inspection. Besides these meetings, they also conduct classroom observations and an evaluation of school records. There are also regular “thematic reviews”, that cover specific topics such as teacher performance, budget management or the implementation of a specific policy. Throughout this process, it is understood that the visits are an opportunity not only to monitor compliance with policy and teaching quality, but also to gather bottom-up feedback and learn about the local realities and practical issues that afflict schools. However, these occasions can also become bureaucratic, formal and rehearsed endeavours, with little value for dialogue and substantial feedback.

LESSONS LEARNED AND CHALLENGES

Vietnam has made remarkable advances regarding both access and quality of education. This advancement relies on a series of contextual and cultural elements, practices and policies. Among those, some lessons can be drawn regarding the commitment to stable and significant financing and the system of continuous and multi-stakeholder accountability.

First, accountability is central in this system, with a deeper and wider meaning than an “accountability by numbers” (Ball, 2003). The Vietnam model contrasts in some respects with currently disseminated forms of results-based accountability that requires educators to organise themselves in response to targets, indicators

and evaluations, setting aside beliefs, commitments and prioritising calculations (Ball, 2003). Here, accountability is mostly a form of professional development based on feedback that comes from all school stakeholders. Accountability is thus a way to improve education quality, based on classroom-level coaching. It is assumed that processes matter for quality, instead of having a narrow focus on the measurement of outcomes.

Second, and relatedly, the Vietnam case illustrates a high level of professionalism. Professionalism can be understood as a “particular relationship between the practitioner and their work, a relationship of commitment that is located within communal and internal dialogues” (Ball, 2009, p.668). Besides improving pre-service training, the country has developed a mechanism for regular professional development in schools. Through self-evaluation and evaluations from peers and superiors (subject group and principal), teachers have a chance to identify teaching challenges, discuss alternatives and ways forward, and plan for improvement. This is a developmental approach that goes beyond supervising, monitoring and checking compliance.

Finally, quality is closely monitored, and although the Vietnam case has reached remarkable outcomes, the country’s experience illustrates a focus on processes and participatory practices that involve all educational stakeholders.

However, there are limitations and unclear aspects that require further inquiry. Some commentators have asked for caution regarding Vietnam’s PISA results. They argue the results could be inflated by the exclusion of some students. The OECD has emphasised that the Vietnamese sample is limited to allow for generalisations and comparisons. The organisation also mentions that, although disadvantaged students often perform well, the fact that there are many students out of school hinders Vietnamese education equity (McAleavy et al., 2018; Akmal, 2018). Furthermore, large-scale test results might mask inequalities that exist in the country, that are particularly harmful to minorities (DeJaeghere et al., 2021). Relatedly, despite financing improvements, parents also contribute considerable amounts to school through the practice of “socialisation”. Critics point to how an elevated household contribution can harm access and equity, and that the commercialisation and commodification of education can put at risk the coherence and performance of the system (London, 2021). Lastly, Vietnamese teachers also report limitations in policy implementation concerning teacher training and assessment, which are related to persistent issues of quality, teacher motivation, negative competition between teachers, teaching for tests, lack of training for including students with disabilities and an over-standardised curriculum that can increase inequality. Nonetheless, the Vietnamese experience points to meaningful alternative approaches to education quality that promote the professionalism of teachers with participatory accountability.

LESSONS FROM THE CASE STUDIES

In the context of an international growth of the privatisation of education, this project aimed to develop a series of case studies to strengthen the perception that public education can work, even in contexts of social challenges. The cases showcase positive examples and success stories in public education systems, fostering a rights-based approach that supports social justice.

Thus, some aspects are echoed in the cases and some lessons emerge. Namely, they rescue the role of education for social change and its relationship with the local realities, they reinforce the central role of teachers and the need to invest in the professionalism of teaching, and they emphasise the power of participatory governance. These aspects are discussed below.

➤ LOCALLY RELEVANT EDUCATION SYSTEMS MOTIVATED BY SOCIAL JUSTICE CAN DRIVE POWERFUL SOCIAL CHANGE

The approaches revealed in each case emerge from the local realities, needs, and cultural values, with education systems designed to address specific social contexts. Public education has an intimate relationship with society, being both a product of its context and a tool for social change. The local social purpose of education drives meaningful, acceptable and adaptable learning. It creates a shared commitment and propels innovation, instead of defaulting detached conceptions of quality or standard content from school-chains, which are often irrelevant or harmful to local dynamics (United Nations Human Rights Council, 2021). At the same time, education is not solely responsible for such developments; it remains part of wider efforts and intersectoral and intersectional policies.

This is in stark contrast to the privatising, marketising and commodifying approaches, which tend to isolate education from its context, from its social purposes and other local social issues (such as inequality). In such approaches, education is often framed as a “technical” matter and a tool for economic growth, which should lead to social development (Verger et al., 2016, Ball, 2017, Apple, 2006).

Illustrating the relationship and commitment to social change, the cases of Cuba, Vietnam and the MST in Brazil draw from socialist structures, practices and policies and aim to promote inclusion and social equality. Namibia aimed to break with authoritarian practices from a colonial past. Buen Vivir aims at an alternative way of living and social development, valuing the knowledge of indigenous peoples. These experiences are proudly socially committed, framing education as a tool for social change.

These cases also illustrate how education is deeply embedded in specific local contexts, with their own cultural norms and values, as well as political projects and disputes. Thus, education is also a product of its context, and the approaches of each case emerge from the local realities, needs and cultural values. For instance, the Cuban and Vietnam systems depend on wider policies. The MST project is a response to the social inequality and exclusion of rural people in Brazil. Buen Vivir is an indigenous worldview that aims to shift the understanding of development, and in Namibia, teacher training emerged in relation to national independence. Thus, they are a reminder of how global silver-bullet solutions are likely to become irrelevant and prejudicial to local realities and dynamics.

➤ TEACHERS SERVE AS CATALYSTS FOR CHANGE WHEN VALUED, TRAINED AND EMPOWERED IN BOTH SCHOOLS AND STRATEGY

In successful public education systems, teachers are treated as active and creative professionals, and are trained, supported and empowered to play an active role in schools. They are central to education planning and to evaluating pedagogical processes. Professionalism is fostered as a reflexive practice and as a relationship of commitment embedded in communal and internal dialogues.

This contrasts with approaches that position teachers as deliverers of content, dependent on standardised curricula and large-scale tests, or fast-track training solutions. In privatising approaches to education, teachers have been increasingly subjected to low salaries, poor working conditions, and quick training solutions (such as a few weeks of training and/or e-learning courses).

In Cuba, teachers go through intense training and receive support from principals. In Vietnam, there is a similar dynamic, but with a greater focus on a developmental form of accountability that fosters monitoring and cooperation of stakeholders. In Namibia, they were key in the education reform, seen as fundamental pieces to enact the desired systematic changes in education culture and pedagogy. In the MST, teachers are part of the community, responsible for connecting local realities with external contents and norms. In Bolivia and Ecuador, they are framed as creative actors that must advance the new educational values of Buen Vivir. These cases put teachers at the centre of the systems as active and creative subjects, trained and empowered to play an active role in schools, searching for ways to promote quality and equity.

➤ PARTICIPATORY AND SUPPORTIVE ACCOUNTABILITY PROMOTES PROFESSIONAL DEVELOPMENT AND EDUCATION QUALITY

Across the case studies, accountability is a participatory process that engages several stakeholders. It has a developmental approach, which advances teacher professionalism and community engagement focused on improving education quality. Professionalism is understood as a “particular relationship between the practitioner and their work, a relationship of commitment that is located within communal and internal dialogues” (Ball, 2009, p.668).

This is implemented instead of relying on high-stakes, test-based accountability, school leaders assess and assist teachers, who also evaluate and support each other, and parents offer and receive feedback, creating a loop of reciprocal accountability. The market-based accountability depends on the pressure the client places on the schools (Edwards & Klees, 2015), pressuring teachers with high-stakes testing that is supposed to foment accountability by results and provide incentives for improvement. However, a series of damaging side effects have been documented as a result of these policies. Teaching then centres on preparing students for tests, leading to curriculum narrowing, cheating and gaming, exclusion and increased inequality (Au, 2007; 2010; Holloway et al., 2019; Verger et al., 2019), and they are profoundly harmful to the professionalism of teaching (Ball, 2009, 2010, 2016).

In Cuba, test results are not made public, but are a tool for closely monitoring learning so that teachers can improve. Teachers also stay with the same students for a long time, and are responsible for their learning. In Vietnam, teachers receive feedback from peers, supervisors and parents, and use it for professional development. In the MST, citizens hold governments accountable by learning about their rights, about how to monitor policies and demand for governments to fulfil their legal commitments.

➤ ENGAGED COMMUNITIES ENHANCE THE QUALITY OF EDUCATION

Community engagement occurs in different forms in the examples examined, but always as an active and relevant part of an ecosystem that elevates the quality of education. Local communities are part of the creation of locally relevant solutions. This contrasts to approaches that treat students, families and communities as consumers of education with passive roles, and stakeholders are active in these case studies.

This engagement of the community promotes citizenship. Thus, democracy is not an abstract concept, but rather a concrete relationship and practice lived and experienced by stakeholders in a “thick” democracy (Apple, 2006, Gandin and Apple, 2002). This contrasts with privatising approaches that frame students, families and communities in a commercial way. In this relationship, school communities have the passive role of consumers, instead of active actors that can and should contribute to education. Their “participation” is thus reduced to the choice of school and some input over school life as volunteers (Edwards and Klees, 2015; Apple, 2006).

For example, the MST shows an engagement with policy and advocacy, in which parents learn about their rights, actively diagnose issues and search for solutions, and interact with other stakeholders to promote change. In Vietnam, parents are part of the accountability system, helping teachers in reaching quality. The local communities are part of the unearthing of locally relevant solutions.

As a by-product of such engagement and consequent improvement, some cases saw a reversal of education privatisation. This has happened in Bolivia, where the perception of public schools changed due to the improvement of schools and, perhaps more importantly, the perception of their quality improved (Verger, 2016).

➤ SUSTAINED EDUCATION FINANCE DRIVES SOCIAL TRANSFORMATION THROUGH ENHANCED QUALITY AND INCLUSION

The elements for quality mentioned above require a sustained financial commitment by states – even in the context of constrained resources. The Education 2030 Framework for Action set two benchmarks: to allocate at least 4% to 6% of GDP to education, and/or allocate at least 15% to 20% of public expenditure to education, a goal reached by many of the analysed cases. Most importantly, they illustrate a long-term commitment and a trajectory of increasing financing at the scale of each country’s possibilities, even when not reaching OECD standards in absolute terms in the short term. Retrogression in commitment and funding can have devastating impacts and austerity is not an approach taken in these successful cases. Finally, the experiences show that communities should be engaged in monitoring and demanding adequate financing.

For instance, Cuba has consistently spent more than 5% of GDP in education since 1994, and more than 10% since 2007. Ecuador has increased its expenditure in education from 1.15% of GDP in 2000 to 5% in 2015, and from 5% to 12.8% of public expenditure over the same period. Thus, while remaining below the targets, the trajectory and constant increase in funding has been key to the country’s educational progress. Furthermore, the MST case illustrates the importance of allocating resources to guarantee the right to education for all, including historically excluded and remote communities. Vietnam adopted a commitment to invest “20% of all public spending” in education (McAleavy et al. 2018). Despite not reaching this goal and having oscillated through the years, the investment has been consistently high, from as high as 18.05% in 2008 to 15.24% in 2009, followed by a yearly rise, reaching 18.79% in 2012, and then dropping to 14.47% in 2018 (World Bank, 2021a). As a percentage of GDP, it rose from 3.57% in 2000 to 5.6% in 2013, but fell to 4.1% in 2018 (World Bank, 2021b).

FINAL REMARKS

These case studies and five lessons provide examples of how public education systems can improve in a variety of contexts. While possible actions remain context-specific and may vary, collectively the cases demonstrate the possibility for effective and impactful action for change everywhere. The cases and lessons provide potential starting points and inspirations that governments may use to initiate improvements in their public education systems and to move away from some of the market-based strategies that have failed to serve children over the last few decades.

For instance, governments may:

1. Embed education in local culture and development plans, creating relevance and motivation for education stakeholders;
2. Support teacher recruitment, training and career development, so teachers become catalysts of change;
3. Frame or reframe accountability as a participatory practice that encourages transparency and professional development;
4. Create forums that assemble students, parents and teachers, and that enable public participation in policymaking to drive education quality;
5. Commit to sustainably and gradually increase funding for education, as a share of the national income (with a target of a minimum of 6% over a sustained period of time).

Engaging in some or all of these recommendations will pave the way to strengthen free, public and transformative education that is needed for a more inclusive and fairer world for all. Public education is fundamental for building more equal, just and sustainable societies. This study has showcased positive examples of public education in very diverse settings and contexts. The cases challenge the disseminated idea that public education needs privatisation for quality, and point to a rights-aligned and socially committed definition of quality - including the aim for social inclusion and equity, the engagement of community and local actors, valuing teachers, respecting local culture.

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APPENDIX 1. CASES FOR FURTHER RESEARCH

This working paper reports the findings of a few case studies that were selected from a much wider sample of positive examples of public education. As mentioned, this study does not aim to offer an exhaustive list, nor does it claim to explore the best cases and systems. Instead, here we have analysed a few interesting and inspiring cases, out of many other possibilities. Here we present just a few other interesting cases that should be researched further.

BARBADOS

Barbados has impressive results in education, with free primary, secondary and tertiary education, and almost 100% in enrolment and literacy rates. To support this, the country offers support to students, with free meals and transportation, as well as awards and scholarships.

CAPE VERDE

Cape Verde has a much lower participation of the private sector in education provision compared to other African countries. The hypothesis is that the government has considered education a priority and invested a considerable amount since the 1980s/1990s. As a result, there is little participation of private providers in the sector (in primary and secondary education). On the other hand, early years and higher education, with little public investment, have a high percentage of enrolment in private schools.

COLOMBIA

“Escuela Nueva” is an approach to education, not a system. It was first considered for the rural population in the 1960s, but has since then grown as an internationally used approach. It still is more commonly used in rural education, now applied in 25,000 schools in Colombia, and has reached over 16 countries. It is based on Freirian principles of critical education, and it involves participatory governance (with committees), promoting an active education based on experimentation, interaction and creativity. These schools also score higher on traditional measures, with lower drop-out rates, high community participation and better performance in some subjects like mathematics and language. A UNESCO report in the 1990s concluded that it was because of Escuela Nueva that Colombia was the only country in South America where poor rural schools were providing a better education than city schools.

INDIA. MUSKAAN PROJECT

ActionAid collaborated with UNICEF to promote the engagement and participation of local communities in the management of schools in the region of Uttar Pradesh in India. The project was implemented in 1,464 schools across 6 districts and strengthened school management committees (SMCs) and community-based grievance redressal mechanisms. The project led to the improvement of public schools, with increased enrolment, reduced dropout rates and led to some privatisation reversing, with children returning to public schools.

NEPAL

Despite the growing presence of private schools and the narrative that they offer a better service than public schools, there are successful public schools in Nepal, which are regarded as high quality by the government and families. These schools are assessed by the government and labelled “model schools”, which grants them better funding and a position of leadership in their region. These schools have a child-centred approach, with trained teachers who show commitment through high attendance, with an engaged parental community and adequate physical infrastructure. All of this leads to good learning outcomes. Understanding how these schools operate

is fundamental to reverse privatisation, as parents often choose to enrol children in private schools due to the belief they are better than the public ones.

SENEGAL

Senegal has implemented a vast education reform since 2000. Amongst the adopted policies, two programmes have been fundamental: the Programme Décennal de l'Education et de la Formation (2000 - 2010) and the Programme d'Amelioration de la Qualité, de l'Equité et de la Transparence (2013 - 2025). These programmes have tackled teacher training and governance, aiming to improve quality, equity and transparency. Civil society has been actively engaged in the formulation of these policies, as well as on monitoring during implementation. These policies have had considerable impact over the literacy rates and became known as a good example of governance in the francophone region. As a result of this, the country has low levels of privatisation in primary education (despite considerable rates of privatisation in secondary and higher education).

SOUTH AFRICA

A large-scale intervention to promote systemic improvement was implemented in South Africa, known as the "Jika iMfundo campaign". It was conducted in 1,200 primary and secondary public schools in the districts of Pinetown and King Cetshwayo in KwaZulu-Natal, from 2015-2017. The intervention was funded by the National Education Collaboration Trust, led by the Department of Education in the province, and supported by the Programme to Improve Learning Outcomes (PILO) and other key stakeholders. The trial at scale focused on building institutional management routines at the school and district levels to support the improvement of curriculum coverage in order to improve learning outcomes.

ZIMBABWE

The Zimbabwe Secondary School Science Project (ZIM-SCI) was started in 1981 with the aim of developing a low-cost science course which could be taught during the first 2 years of secondary school without the aid of qualified teachers and conventional laboratories. Project activities included developing student study guides, corresponding teaching guides and science kits, implementing and evaluating the course, and other efforts. The programme promoted imaginative strategies for teaching basic science in settings with little science equipment and other resources.