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On global absences: Reflections on the failings in the education and poverty relationship in Latin America[☆]

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Abstract

This paper explores some of the aspects of the relationship between education and poverty as it has been constructed by international organisations and national governments in Latin America. The analysis is carried out from two separate angles. On the one hand, the paper highlights the main failings that underlie the positive and hoped-for relationship between investment in education and the reduction of poverty. On the other, it demonstrates how a good number of these failings can be attributed to an underestimation of the inverse relationship, i.e. the effects that poverty has on education. Though this analysis can be understood from a general perspective, evidence from Latin America is used to illustrate the consequences of these global absences.

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1. Introduction

At the beginning of the 21st century, the poverty statistics in Latin America remain horrifying. The poor currently number close to 220 million, of whom 98 million are either living in extreme poverty or are completely destitute. After the economic and social drawback of the 1980s, the 1990s saw a

certain level of economic recovery, though this did not succeed in reversing the ongoing rise in poverty in absolute terms, and relative poverty only fell by 5 points in the years between 1990 and 1997, affecting 43–44% of the population by the end of this period (CEPAL, 2004). Inequality indicators continue to show that the distribution of income is highly polarised, with Gini coefficients close to 0.6% and a tenth of the population enjoying around 50% of total incomes in countries like Brazil, Chile, Guatemala and Colombia (World Bank, 2004).

Paradoxically, this situation has occurred against a background of a certain level of economic recovery in the region throughout the 1990s (notwithstanding the crisis in Argentina), and in an environment in which neo-liberal policies in the area of social policy have been moderated, particularly during the latter half of the decade. Indeed, the

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decade saw an increase in social spending in the region, both as a proportion of GDP and per capita (despite the slight deterioration in this indicator between 2001 and 2003).

In this context, education has not only been one of the sectors that has experienced a significant increase in public spending (the average figure for the region rose from 2.9% of GDP in 1990 to 4.2% in 2001), it has also formed one of the basic cornerstones in the design of strategies to combat poverty. Indeed, education has featured at international meetings and summits (such as the ones sponsored by UNESCO in Jomtien and Dakar as part of the *Education for All* project, and the UN summit held in 2000, which led to the creation of the Millennium Development Goals), as well as on the agendas of both development agencies and individual states as one of the key fundamental instruments that is essential if poverty is to be eradicated. The World Bank, unquestionably the institution with the greatest capacity to influence education policy in relation to development, has published a large number of documents in which education continues to play a central role as a basic tool in the fight to combat poverty (World Bank, 1999a, b, 2001, 2004). The latest *Poverty Reduction Strategy Papers (PRSP)* promoted by the World Bank and the IMF since 1999 include, among other things, “good practices” for the sector, recommendations for investment in education that focus on the most vulnerable sectors.¹ The 1990s also saw the urgent introduction of a number of targeting programmes associated with education in almost all Latin American countries, programmes that were intended to break the inter-generational cycle of poverty by offering access to schooling by the poorer sectors of society and improving the quality of schools located in the most disadvantaged areas.²

In addition to the many accepted advantages that human capital theory attributes to education as a development strategy (improvement of employee productivity, increased competitiveness and economic growth, improved income levels, etc.), additional arguments have recently been heard that

further reinforce the central importance of education as a key policy for competitiveness and social inclusion. On the one hand are all the arguments relating to the impact of globalisation and the emergence of the information society: the information economy turns knowledge into a fundamental consumer asset in the productive process, meaning that investment in human capital is more necessary than ever for technological progress, competitiveness and growth. On the other, education is also considered a privileged instrument in the development of social capital and social cohesion (Putnam, 2004). In other words, education represents the best policy for reinforcing a set of social values and rules that will help to improve reciprocal relationships, trust, tolerance and social integration. From this come good institutional practices and an improved democratic culture, not to mention positive influences on productivity and growth.

Both the old and the new effects expected from investment in education are today shaping the debate and influencing the content of education policy in the fight against poverty, both among international bodies and within individual governments themselves. However, up to the present, the results of the contribution made by education in overcoming poverty are clearly not encouraging. In Latin America, increasing levels of education have meant that primary education is now almost universally available (with some important exceptions), while the number of children in secondary education has increased notably and the average number of years that each pupil spends at school has also increased (CEPAL, 2002). Poverty, on the other hand, despite showing a general trend towards reduction in various countries in the region during the 1990s, seems to have remained steady (and even begun to increase in some countries) from the second half of the decade onwards.

Of course, there are many factors which are unconnected with education and which could explain the reason why poverty levels have not been reduced, even during a period of economic recovery such as the one experienced by Latin America during the 1990s. However, the fact that poverty remains such an issue in spite of repeated “calls” for the use of education as a privileged mechanism in the fight to combat the problem remains surprising. This paper explores some of the aspects of the relationship between education and poverty from two separate angles. On the one hand it highlights the main failings that underlie the positive and

¹The creation of a PRSP is now a prerequisite for Highly Indebted Poor Countries (HIPC) if they are to gain access to further credit. The EU has also used PRSPs as a basis for its five-year development aid programmes in Africa, the Caribbean and the countries of Southeast Asia.

²For a description of the different targeting programmes implemented in the region see, for example, the book by José Rivero (1999).

hoped-for relationship between investment in education and the reduction of poverty. On the other, it demonstrates how a good number of these failings can be attributed to an underestimation of the inverse relationship, i.e. the effects that poverty has on education. The paper is structured as follows: the first section deals with the limitations of educational expansion for reducing poverty; the following section concentrates specifically on the evidence gathered from targeting programmes connected with education as a strategy for combating poverty. Finally, the last section examines the consequences on poverty of an education policy agenda that does not take sufficiently into account the effects of poverty on education. Each section also contains an assessment of the implications suggested by an analysis of the relationship between education and social cohesion, underlining the limitations and opportunities represented by education policies as a tool for combating poverty.

2. What of globalisation? The limitations of educational expansion as a way of reducing poverty

Since its creation at the beginning of the 1960s, human capital theory has broadly informed and justified education policies that are geared towards development, both where such policies are developed by individual national governments and where they are promoted by international organisations, particularly the World Bank (Mundy, 2002; Heyne-man, 2003a). The human capital theory assumes that investment in education will have positive effects on human skills and worker productivity, effects that will bring benefits both individually (higher income, the acquisition of status) and socially (economic growth, technological progress and collective well-being). The validity of this theory rests on the acceptance of its universality. In other words, *any* individual should have the opportunity to take advantage of their innate abilities and invest in themselves, in such a way that their social standing becomes solely a reflection of their talent, efforts and personal motivation. The political implications of this theory are clear: each social formation should ensure that the basic conditions are in place so that the educational results achieved (and the resulting acquisition of social position) are an exclusive reflection of personal aptitudes.

More than 40 years on from its original conception, the rationale of human capital theory remains

valid. However, as we shall observe in this paper, different political views have been expressed regarding the provision of the basic conditions required in order to be able to take advantage of individual abilities. It is beyond doubt that the factor that has been most instrumental in causing a review of these conditions is the persistence of a poverty problem that is not merely the result of a failure to take advantage of the opportunities offered but, in most cases, a reflection of the fact that it is actually impossible to take advantage of these opportunities.

Essentially, the theory assumes that investment in education must have repercussions on the acquisition of the knowledge and skills required in order to allow children from poor homes to overcome their situation of poverty. Morrisson puts this point clearly.

Human capital theory assumes that any expenditure that provides five years of primary education is supposed to result in the acquisition of the same basic reading, write and arithmetic skills. It is also assumed that this stock of knowledge allows individuals to obtain employment at a given wage level, which, might, for instance, be twice that of the jobs available for an illiterate person. These two assumptions lead to a simple, stable relationship between an expenditure in favour of a child from a poor household and the future earning potential which will lift that child above the poverty line (Morrisson, 2002, p. 6)

Morrisson's description offers an understanding of how, from the human capital theory point of view, it is assumed that educational expansion policies are beneficial as a strategy to combat poverty. The assumption is that the greater the provision of educational opportunities, the greater will be the number of children from poor homes who do not repeat this cycle of poverty. Yet, one might ask, has educational expansion in Latin America had so little effect on poverty reduction? An immediate and simple explanation is offered by Morrisson when underlining the limitations of *input* oriented policies: one cannot assume that schooling is equivalent to learning, that is, to effective acquisition of the necessary skills to function in social institutions. In this regard, the indicators relating to years completed in each cycle (particularly in basic education) would be much more effective in showing the effectiveness of educational expansion (Morrisson, 2002). If we study the results,

the cases of school dropouts are concentrated among children from poor homes,³ which explains why the people who benefit most from educational expansion are children from homes that are not so poor, and that the opportunities for children from lower income homes to take advantage of improvements in education are comparatively unequal. This circumstance has clearly not passed unnoticed in the international debate on education: it is no coincidence that the Millennium Goals refer to the completion of basic education and not simply educational access.

Nonetheless, Morrisson's critique does not give us a full explanation of the limitations of educational expansion as a strategy for reducing poverty, because although the benefits of educational opportunities may be unequal depending on the level of poverty of the homes from which children come, there is nothing to prevent a significant number of poor children from attending school and completing their basic education. This, which Boudon (1983) illustrated when referring to the expansion of educational systems in Europe, is exactly what has happened in Latin America over the last two decades: in spite of the fact that the available opportunities have led to unequal benefits, a significant number of children from poor homes have attended school and completed their basic education. Teresa Bracho's, (2001) study of education and poverty in Mexico, for example, shows a notable improvement in educational levels among children from the lowest-earning fifth of the population between 1984 and 1996.

The second reason is also simple and is to do with the minimum level of education required in order to allow individuals to escape their situation of poverty. CEPAL (1994) remarked on this 10 years ago, indicating that the threshold required in order to escape the poverty trap in Latin America was 12 years of schooling, a threshold that is equivalent in the majority of cases to the completion of secondary education. Several commentators have reaffirmed this, referring to the "end of easy educational expansion" (Tedesco and López, 2002) and to the fact that education is "increasingly necessary and increasingly insufficient" (Filmus, 2001).

The devaluation of education credentials in the labour market is connected both with the expansion of educational systems and with the effects of

globalisation on the relationship between education and employment. The increased number of people available at each educational level is devaluing wage payments at each of these levels, especially among those with medium and low levels of education (Carnoy, 1999). At the same time, global economic inter-dependence is in turn generating greater inter-dependence of wages between the different domestic labour markets. Traditional national systems in which there was a corresponding relationship between education and employment have been changed by a global economic structure which is characterised by a high level of mobility of both financial and industrial capital, and this change is experienced in a substantially different way, depending on the educational level of the work force segment in question. Highly qualified workers are able to protect the value of their qualifications more easily, while the lower qualified have to endure international competition resulting from the reduction of labour costs (Bonal and Rambla, 2003).

Literature on this matter has shown that the effects of educational expansion on both income distribution and the reduction of poverty are twofold. Gundlach et al. (2001), for one, referring to the work of Knight and Sabot, observes that the composition effect increases the relative size of the group with higher education (and higher earnings) and thus tends to increase inequality. On the other hand, the wage compression effect resulting from the relatively greater supply of educated labour reduces inequality. Which effect dominates is again unclear and will ultimately depend on the country's level of development, the relative size of the different educational groups, the degree of substitutability between workers with different levels of education, and the wider social, political and economic aspects that affect the structure of relative wages for different educational groups and the demand for labour" (Gundlach et al., 2001, p. 2). Throughout the 1990s, both processes seem to have taken place in Latin America; that is, the relative size of the group with higher education increased, and there is also evidence of a wage-compression effect in the region due to an increase in the average educational level of the labour force. Changes in private rates of return reflect this process: they have increased in higher education and declined especially in primary education. Since there was persistent inequality and poverty in the region over the decade, it may be hypothesised that the first effect has been greater than the second, a result that

³See, for example, the details on premature school leavers in CEPAL (2002).

is consistent with the findings of Dollar and Kraay (2001) concerning the limited impact on the income of the poor of the workforce's higher primary education attainment. Of course, greater access to education cannot be negative for the poor, since they would be in a worse position if they had no access to it. However, as the World Bank (2004, p. 6-6) has recognised, "Latin-American countries appear to have 'too much' income inequality (and we could add 'too much' poverty) given their levels of inequality in years of schooling". In other words, factors other than education seem to have had a stronger influence on inequality and poverty in the region.

Globalisation and educational expansion are, therefore, two sides of the same coin, explaining the paradox of both the need for and the insufficiency of education. One can thus easily understand that although a greater number of the poor may improve their educational level, this may be insufficient as an investment in human capital that is interchangeable on the labour market. Interestingly enough, there is a contradiction between a political discourse that on the one hand stresses the importance of the effects of globalisation on development strategy (in which education must play a fundamental role in improving competitiveness) and on the other overlooks the effects of globalisation on devaluing both the possibilities to invest in education and the returns gained from that investment. That is, although a number of analyses highlight the controversies surrounding educational expansion, mainstream education policies aimed at combating poverty do not appear to take these sufficiently into account. We will see in the last section of this paper that recent anti-poverty policies have tried to correct some of these absences, although they show very modest results. Let us concentrate for now on those absences related to the behaviour of demand in the current context of educational expansion.

An increase in the number of years' schooling required in order to obtain an income that will enable an individual to escape the poverty trap will have consequences for the various strategies and expectations that relate to investment in the education of different social groups. While certain groups are in a position to visualise educational investment strategies in the medium and long term, the most excluded groups do not have access to the resources required for an investment of this nature. Thus, although the rates of return corresponding to

completion of each educational level (the basic method used to evaluate investment priorities at both a public and a private level) are positive, and the benefits therefore exceed the costs, this assessment hides the obstacle represented by the short-term availability of financial resources in poor homes. The greater the amount of investment required in education, the harder it will be for these homes to find it. There can be no return if one cannot even begin to invest, and the average rates of return recorded hide that fact that it is impossible for poor homes to invest in the medium term.⁴

Another of the neglected effects of the increase in the educational threshold required in order to achieve social inclusion relates to the limitations of the human capital theory when it comes to assessing the consequences of the collective strategies applied in educational investment and social distinction mechanisms (Bourdieu, 1998). The diminishing value of qualifications that comes with mass education and globalisation has led to the activation of a set of strategies and mechanisms aimed at creating distinctions, particularly among those groups whose social reproduction is assured in the cultural capital arena. Faced with the potential devaluation of the educational capital they have acquired, the middle classes resort to ways of distinguishing themselves on the basis of quality differences (in Latin America this means paying for private education) and the remodelling of certain forms of capital (from cultural capital to symbolic forms of capital and social capital).⁵ At the same time, the insufficiency of investment in education is particularly visible among those groups that have no opportunity to reconvert the different types of capital.

Although it is certainly true that the advantages of educational expansion lie, among other things "in the improvements that can result from its distribution without the need to deprive others" (World Bank, 2004, p. 11), a principle that

⁴This issue has not gone unnoticed by specialists at the World Bank. In its most recent report on Latin America, the organisation recalled the need to allow the poor to gain access to the credit system in order to offset their greater need for resources (World Bank, 2004, p. 12).

⁵Bourdieu provides a number of interesting examples of the mobilisation of symbolic resources by the middle class. One of these, for instance, is the creation of new forms of expertise in new professions within the symbolic and cultural fields related to a certain conception of taste, such as aesthetics or art management.

characterises imperfect public goods, it is also true that “the amount of education received by the others” becomes increasingly important as certain social groups gain increasing access to educational levels from which they have traditionally been excluded.⁶ The consideration of collective and not just individual strategies, and the inclusion of the struggle for status between different groups are therefore factors that modify the expected effects of educational expansion on the reduction of poverty in the medium and long term.

These social and qualitative mechanisms have not been ignored by mainstream economics. Indeed, the importance of different forms of capital, and particularly the significance of social capital, has been understood by some authors as a form of “colonisation of the social” carried out by economics (Fine, 2001, p. 155). Although both positive and negative forms of social capital are recognised, social capital has been considered by institutions such as the World Bank as the “missing link” in explaining economic development (Grootaert, 1998), and as a normative concept by which to stress the social benefits of social interaction. Thus, education has especially become a privileged space for reinforcing social capital through mutual trust and the construction of community ties. However, less attention has been given to other aspects of educational change that may reveal the negative side of social cohesion. Educational expansion and credential inflation, for example, do not have neutral effects on educational demand; rather they vary depending on the social background and the level of “risk aversion” (Van de Werfhorst and Andersen, 2005), a situation that may undermine the maintenance of bridging and linking ties amongst social groups. Despite the significance of these findings, the incorporation of the consequences of this type of research into education-policy making is still pending, especially if effective pro-poor strategies are to be developed.

These reflections also offer an illustration of the relationship between education and social cohesion. The reciprocity between education and social cohesion, a two-way relationship sustained by the high levels of correlation between human capital

and social capital, can be seen in various ways (Putnam, 2004; Ritzen et al., 2000). Going beyond the potential criticisms of the interchangeable use of the terms social capital and social cohesion,⁷ the above reflections leave questions as to the supposed effects of educational expansion on social cohesion, since educational expansion itself contains the seeds of competition between different social groups who are seeking status and access to differentiating forms of education as an asset that brings social standing. This criticism does not in any way diminish the fact that education can effectively offer positive benefits for social cohesion,⁸ though it does sound a warning regarding the recognition of certain circumstances that will lead to greater fragmentation and division rather than cohesion. Schools can contribute to fostering social cohesion through different mechanisms, such as teaching the “rules of the game”, providing an experience consistent with principles of citizenship, treating students fairly and incorporating the interests and objectives of many different groups whilst at the same time providing a common underpinning for citizenship (Heyneman, 2003b, pp. 76–77). All these factors can contribute to an experience that reinforces not only the information that students will have about the rules, but also, as Heyneman (2003b) points out, will lead to a greater understanding of the reasons for social contracts, which in turn is more likely to facilitate adherence to common norms and values. But there are a number of caveats that have to be considered when valuing the contribution of education to societal cohesion. First, education is only one of four organisations that contribute to social cohesion. There are political, social and economic organisations that may strengthen or undermine the roles played by the education system (Heyneman 2003b, p. 78). Second, even if aspects such as curriculum content or school climate are generators of inter-group cohesiveness, schools are expected to provide access to credentials that have a certain value in the labour market. But not all groups in society may experience the same exchange value for the same education

⁷See for instance the different meanings of both concepts in Green et al. (2003).

⁸Putnam, for example, underlines the effects that the proper teaching and curricula can have on the construction of civil conscience, the benefits of extra-curricular activities, the central nature of the school as a community meeting place, integration through cultural assimilation and linguistic homogenisation, etc. (Putnam, 2004, pp. 6–7).

⁶This is the process that results from the distinction and remodelling mechanisms referred to earlier, and the one that lies behind Bourdieu’s (1998, p. 250) mention of a “deceived generation” of children among the French working classes, when he talks about the scant correlation between the efforts they have invested and their low levels of success in the jobs market.

credentials, which is a process that erodes trust in understanding and assuming the rules of the game. In other words, peoples' perceptions of fairness is crucial for societal cohesion (Heyneman, 2003b, p. 88), and in western democracies, perceptions of fairness are deeply related to how the education system itself distributes social and economic opportunities. It is not casual that certain authors find no significant relationship between mean levels of education in a society and levels of trust or tolerance. However, educational distribution may have a very significant influence on societal cohesion in certain contexts, meaning that cohesion does not depend exclusively on socialisation and value formation (Green et al., 2003).

In summary, the effects of educational expansion on social cohesion cannot be taken as an automatic relationship. More education can strengthen the argument for cohesion within groups (bonding) but can also weaken cohesion between these very groups (bridging).⁹ The distribution of education and perceptions of fairness in the system can play a crucial role in reinforcing trust and reciprocity within different social formations.

Finally, the important failings pointed out in this section should not in any way lead us to ignore the fact that, however insufficient, education is “increasingly necessary”, and that, while the benefits of expansion may be limited, the effects on the poor of the failure to expand education could be much worse than those that result from social fragmentation processes. To put it another way, these failings provide us with warnings of conditions that contextualise the educational expansion process and would seem to be overlooked during the design and application of educational policy as part of the fight to combat poverty. Recognising them involves obtaining as much information as we can in order to design policy effectively, and does not in any way mean ignoring the potential benefits that education may bring in reducing poverty.

3. The poor as a target: education and the ‘targeting the poor’ approach during the 1990s

The emergence and expansion of focalised social intervention programmes happened during the second half of the 1990s, as part of the so-called second-generation reforms implemented in the region. Although some Structural Adjustment

Programmes did achieve expected results in their macroeconomic goals, their adverse impact on different social groups was not as temporary or transitory as expected. The cost was too high to the poor, and social exclusion and inequality increased in regions such as Latin America, Asia or Africa. Falling standards of living led to criticism of the IMF and the World Bank, which called for new policies with a “human face”. For their part, the Bretton Woods institutions responded to these criticisms at the beginning of the 1990s with discourses and policies which would establish them as global institutions in the fight against poverty. Identifying the poor and concentrating resources and efforts on providing them with the opportunity to gain access to different markets became the predominant political strategy. This new approach had a rapid effect on the loan portfolios of the World Bank and the IMF, to the extent that, by the end of the 1990s, so-called “emergency social funds” formed 50% of all structural adjustment credits (Mundy, 2002, p. 492).¹⁰

The rapid expansion of focalised social programmes has led to a number of debates regarding the advantages and disadvantages of selective action as compared with more universalist policies. Discussions centre around the underlying philosophies of the various policy options (what type of action is socially more just), the value of one type of action over another in a political context like Latin America (characterised by the numerous client and interest groups that can gain access to public resources) and problems relating to the coverage, selection and implementation costs of each type of policy.¹¹ A complete analysis and assessment of this debate is clearly beyond the remit of this paper, so we shall confine ourselves here to identifying some aspects of targeting education programmes as a strategy for combating poverty, with a view to assessing their effective potential and their limitations.

Educational targeting implicitly involves acknowledging the limitations of educational expansion policies (and other social policies) as mechanisms that will allow the more disadvantaged sectors of society the opportunity to gain access to

¹⁰For an analysis of the evolution of the World Bank's policy to combat poverty and its relationship with the education agenda, see Bonal (2004). An excellent critique of emergency social funds can be found in Cornia (2001).

¹¹See for example Offe (2002), Filgueira (2001), Brodershon (1999) and Coraggio (1995).

⁹Narayan (1999) defines these concepts and gives examples.

the education system. It is justified on the basis of the need to create compensatory mechanisms in a social and economic environment that prevents the children of poor families from benefiting from their time in educational institutions and thus break the inter-generational cycle of poverty. The potential success of this approach can, therefore, only be assessed over the long term, once the educational and post-educational careers of those benefiting from these programmes have been evaluated.

The individual characteristics of the programmes that have been implemented in the region to date vary as regards financial allocations, degree of coverage, conditions of access and length of time within the programme, etc. However, two types of approach can be identified on the basis of the type of educational intervention chosen. On the one hand, a number of programmes are centred around schools located in socially disadvantaged areas. Examples of this form of action that were created during the second half of the 1990s are the *900 Escuelas* project in Chile, the *Plan Social Educativo* in Argentina and the *Fundescola* in Brazil. These programmes concentrate their resources on poor communities in order to facilitate action to improve the quality of teaching. Providing textbooks and other teaching materials, creating teacher-training programmes, improving school management systems and offering incentives in order to increase participation and involvement by families are some of the most common methods used. Assessing the degree to which these programmes have benefited the educational conditions of children from poor families and the degree to which these benefits will be seen in the future is a complex business, not only because of the time considerations mentioned earlier but also because of the difficulty involved in isolating the factors that affect the evolution of poverty.

A second group of programmes has concentrated its efforts on poor families by offering cash payments that are conditional upon the actual school attendance of their children. The most notable examples of this type of programme are the *Bolsa Escola* in Brazil and the *Oportunidades* programme (formerly called *Progresá*) in Mexico. Access to benefits (which varies from programme to programme) generally depends on factors such as the age of the children concerned, the length of time they have been resident in a particular town or city and, in particular, their school attendance rate. Certain regional variations of these programmes

also include regular visits to health centres and attendance at follow-up meetings with the specialist staff who manage the programmes. There have been several evaluations relating to aspects such as the design and implementation of the programmes and their impact on various issues (academic achievement of the beneficiaries, probability that beneficiary families will rise above the poverty line, reduction of child labour, etc.). We do not have the space here to include the results of these evaluations, which have also been made using different methodologies.¹² It is, however, worth pointing out some results that offer an opportunity to reflect on the possibilities and limitations of these programmes as a strategy for the reduction of poverty.

Various of these evaluations underline the existence of a trade-off between size and intensity (Lavinás, 1998; Alves Azeredo, 2003). Financial restrictions and the resulting impossibility of providing universal coverage through these programmes make it necessary to take key decisions regarding the scope of each programme and how amounts are to be concentrated. This dilemma also has implications for the identification of the section of the population that will potentially benefit. In its most recent report on the region, the World Bank analysed Brazil's targeting social programmes and concluded that the better a programme is targeted (beneficiaries are the poorest of the poor), the less extensive its coverage (World Bank, 2004). These options can also have consequences for the impact caused by the subsidies awarded. Lavinás et al. (2001) demonstrate, for example, that in the case of the *Bolsa Escola* programme, financial payments have a positive impact on overcoming poverty for families closest to the poverty line, though the effect on overall poverty is only slight.

Decisions regarding the amount to be paid also depend on the objective that one is attempting to achieve: bringing families up above the poverty line or covering the opportunity cost that results from attending school (Sedlaeck et al., 2001). Likewise, attention should be paid to the variation in the costs involved in implementing programmes in different towns and cities. Sedlaeck et al. (2001) indicates in the case of Brazil that the cost of the *Bolsa Escola* programme represents around 3% of municipal spending. However, there are large regional differences. Places such as Salvador, Fortaleza and Recife

¹²A review of the available assessments from the *Bolsa Escola* programme can be found in Tarabini and Bonal (2004).

allocate 19%, 16% and 12% of their budgets, respectively, while spending in Brasilia and Sao Paulo represents only 0.2% and 0.9% of the municipal budget. These differences are explained by two factors. Firstly, the poorer towns and cities contain a greater number of families that meet the requirements for inclusion under the programme, and the potential number of beneficiaries therefore increases. Secondly, these towns and cities have much smaller financial resources, meaning that the volume of resources allocated to the programme as a proportion of the municipal budget is greater in relative terms.

Evaluations relating to the educational impact of this programme give positive results as regards school attendances and reductions in the number of pupils who do not finish their courses. Setting the condition that payment will only be made if an attendance figure of 85% is achieved has unquestionably helped to improve these indicators.¹³ However, the available evidence relating to the impact of such programmes on the academic achievement of beneficiaries (though scant) indicates that improvements are small or non-existent. In their analysis of the *Bolsa Escola* programme, for example, Lavinás et al. (2001) state that teaching quality and the quality of the school itself are a much better indicator of differences in academic achievement than whether or not a student is *bolsista* (receives a scholarship). Sabóia and Rocha (1998) and Lima Monteiro (1999) also point to the importance of developing measures that concentrate, in addition to actual school attendance, on the quality of teaching available at schools that have no resources and are not sufficiently prepared in order to attend to an extremely needy population.

Finally, evidence of the way in which these programmes have contributed to a reduction in child labour show that they have had little or no impact (Lavinás et al., 2001). Furthermore, ex-ante simulations of the size and intensity that would be required of these programmes in order to have a significant impact on the reduction of child labour have shown vast differences with their current

dimensions, in the case of both the *Bolsa Escola* (Bourguignon et al., 2002) and *Oportunidades* (Calderón, 2004) programmes.

In short, the evaluations reviewed above permit us to indicate the significant limitations of targeting programmes as a strategy for combating poverty. Firstly, it seems clear that the effectiveness of targeting as a strategy to combat poverty requires a high degree of both range and intensity, i.e. broad coverage and high budgets. However, in the extreme, broadening coverage and increasing resources cancels out the actual point of the reasoning behind targeting, which consists of being selective and not universal (Bonal, 2004). Given current conditions and the magnitude of social exclusion in the region, it is unrealistic to attempt to suggest levels of coverage and intensity for targeting programmes that might be effective as a mechanism for combating poverty and/or its intensity. In reality, the financial limitations of these programmes lead, in some cases, to processes in which potential beneficiaries are excluded (families that meet the requirements for inclusion but do not gain access to the programme) and, in others, to the introduction of rotations that reduce the amount of time that beneficiaries remain on the programme and thus diminish the effectiveness of this subsidy in the medium term. As Lena Lavinás points out, some families are only guaranteed financial benefits for one or two years, meaning that “some begin to gain while others begin to lose once again, in a game that balances out at zero and in which everything is temporary except misery” (Lavinás, 2000, p. 8).

Secondly, in spite of the fact that many of the effects of focalised educational programmes will only be seen over the long term, the scant effect on educational achievement indicated by some assessments casts doubt on the effectiveness of conditioned financial subsidies as an “educational” mechanism that will break the inter-generational poverty chain. Indeed, subsidies allow poor families to improve their position in the consumer chain and, particularly among those closest to the poverty line, capitalise on these subsidies as an investment that will enable them to rise above the poverty threshold (Lavinás, 2000). This statement assumes that one can place a positive value on subsidies as a mechanism for alleviating poverty, but it diminishes the educational component on which the subsidy depends as a strategy for combating poverty. Of course, schooling offers positive benefits that go beyond mere academic learning, but the weakness

¹³It should nevertheless be stressed that these figures also differ on the basis of family income levels. Policies aimed at reducing the number of premature school-leavers in Latin America have brought positive results, but their impact is uneven and depends on income. The number of premature school-leavers among the poorest 20% has not changed very much, meaning that they represent an increasing proportion of the total number of drop-outs and thus intensify internal inequalities (CEPAL, 2002).

of the effects of the subsidy on educational performance itself shows how targeting is inadequate as an educational policy that will improve the educational careers of children from poor families, especially in contexts such as the ones already mentioned, in which access to secondary education at least is fundamental in order to escape poverty. This statement does not undervalue the different forms of explicit or hidden learning taking place in everyday school practice; rather, it reveals that achieving the necessary credentials is a crucial aspect if children from poor homes are expected to gain access to secondary education.

Finally, we should also reflect on the effectiveness of conditioned educational policies as a mechanism for strengthening social cohesion. On the one hand, some commentators point to the existence of greater social take-up as the result of the fact that payments to the poor are associated with a particular condition, particularly if this relates to an institution with social value such as a school (Morley and Coady, 2003, p. 6). Likewise, the design of some programmes favours the involvement of beneficiaries in the community and the creation of relational networks that contribute to improvements in education, health and nutrition.¹⁴

However, there are other processes that relate to conditional subsidies and that may weaken social cohesion. Firstly, there is the stigmatising of the people who benefit from social aid policies, a process that is accentuated when this involves the payment of financial subsidies. Secondly, the means-testing requirements associated with targeting programmes lead to what some commentators have referred to as “vigilantism” (Filgueira, 2002). Going beyond the problems associated with the cost-effectiveness of the programmes, the monitoring systems weaken one of the elements that is most stressed in the various discourses (and even in the indicators) relating to social capital and social cohesion, namely that of trust. Thirdly, means testing also means establishing a cut-off point between the “deserving poor” and the “non-deserving poor”, a policy that breaks the bonds of solidarity within an individual group. Finally, if the

condition placed upon school attendance is not backed up with policies to improve teaching quality, this may lead to the further concentration of the most disadvantaged pupils in certain schools and increase polarisation within the educational system (particularly between private and public schools, but also between the public schools themselves). The social assistance aspect of targeting could therefore serve to strengthen the alienation between a middle class that looks to the market for guaranteed quality of service (and at the same time softens its claims for quality public services) and the socially excluded groups that are the end-users of very low quality public services.

In short, there are not many signs that would lead one to conclude that targeting educational programmes represent a powerful tool for the reduction of poverty, above all structural poverty, that will provide anything more than short-term improvements in consumer status. There would also seem to be little convincing evidence of the virtues of such policies as a way of providing greater social cohesion and, as a consequence, conditions that will generate cooperative networks aimed at combating poverty. Is it therefore a mistake to place so much emphasis on educational policy as a strategy for overcoming poverty? Are the limitations of investment in education greater than the possibilities? Does recognising these limitations and failings mean sidelining educational policy as a basic tool for breaking the inter-generational poverty cycle? The answer to these questions is and must be “no”, but it is therefore necessary to take account of the dynamics mentioned above and ask questions about the conditions relating to educational investment before assuming the kind of effect that is based on statistical correlations that have little meaning for the poorest groups.¹⁵ This necessarily means examining the effects of poverty on education before making suppositions about the positive effects that education will have on reducing poverty.

¹⁴The *Oportunidades* programme in Mexico, for example, includes a “community promoter” who is chosen from among the mothers in the beneficiary group. This person acts as a link between the programme’s specialist staff and the families in the community. She also organises meetings and informs beneficiaries of their rights and responsibilities (Morley and Coady, 2003, p. 4).

¹⁵Transforming correlations into causal relationships is common practice in analyses and recommendations associated with development policy, especially in the work of the World Bank (Carm et al, 2003). In the educational arena there are several examples, running from the now historical correlation between education and economic growth and less poverty to the more recent correlations that assume that education contributes to social cohesion, based on an international comparison of the correlation between educational levels among the population and social cohesion indicators, such as crime figures, the risk of poverty, income inequalities, the percentage of unemployed households, etc.

We will discuss this issue in the third section of this paper.

4. The effects of poverty on education: the consequences of “short educational policy menu”

The problem of ignoring the processes associated with the demand for education is not a new one in the sphere of development education policy. The mistakes made in the planning of educational supply, developed on the basis of the Manpower Planning Forecast, had a particularly significant effect on the World Bank’s credit priorities during the 1970s. The lack of any correspondence between production modernisation requirements and the supply of education led to problems in curricular planning and a serious waste of resources (Heyneman, 2001; Williamson, 1979). It was only from the 1980s onwards that serious thought was given to the importance of the actual educational demand patterns.

In developing countries, demand by families began to be taken into account only in the 1980s, in the context of adjustment policies. The drop in primary school enrolments in the rural areas of several sub-Saharan African countries and Morocco demonstrated that supplying a service was not enough to ensure that it was demanded. Owing to falling employment in the modern sector, particularly in the Civil Service, some parents refused to send their children to school (Morrisson, 2002, p. 14).

The 1990s saw further discourses on educational policy that underlined the importance of cultural contexts and, in particular, the need to heed the voices of the excluded in order to provide an effective and cohesive response to their hardships.¹⁶ However, this approach would seem, to date, to have had little effect beyond that of targeting education programmes. Heyneman (2003a) has referred, for example, to the persistence of a “short educational policy menu” when describing the scant changes that have been seen since the beginning of the 1980s in the World Bank’s priorities regarding educational policy. As a result, educational policy in a development context would seem to include two arguments for political action that have always been regarded as complementary rather than contradictory. On the one hand is the argument for

reforming educational systems in respect of their financing, administration, human resources and assessment policies. On the other is the argument for attending to the educational needs of the poor through targeting strategies. Both approaches have been developed simultaneously without any thought for their possible effects on one another. This is a particularly significant failing, since it means ignoring the ways in which systematic educational reforms may have repercussions on the most disadvantaged groups and the corresponding effects on educational demand. Let’s look at some examples.

4.1. Cases relating to the inelasticity of demand

Since the beginning of the 1980s, many countries have introduced reforms into the ways in which they finance education. The introduction of academic fees and other methods aimed at recovering costs have been common measures in developing countries, to the extent that there is still a long list of countries that retain school fees for primary education, in spite of the fact that this contradicts the Millennium Development Goals relating to the universal availability of basic education and greater international consensus regarding the removal of enrolment fees (Tomasevsky, 2004). That being said, the main reforms in financing systems have related to secondary and advanced education. The argument in favour of cost recovery is based on the need to offset falling public spending in these areas. It is argued, on the basis of simulations, that increases in academic fees can provide the benefits of increased supply without a significant fall in demand (due to its inelasticity), and one thus obtains improvements from a point of view of both efficiency and equality. This policy also allows public spending to be redirected towards the most needy sectors.

However, the theses on which this argument is based have been criticised on more than one occasion. According to Colclough (1996), for example, the idea of the inelasticity of demand is not correct if one considers falls in family income or reductions in the expected benefits of investing in education. Furthermore, levels of elasticity in the demand for education differ substantially depending on income levels. Elasticity increases as the proportion of cost recovery becomes greater (Colclough, 1996, p. 596). Other factors, such as differences in the levels of information regarding

¹⁶See for example the World Bank publication *Education Sector Strategy*, 1999.

the potential benefits of investing in education among different social groups or the negative impact on the incomes of the poorest families, whose ability to pay for their basic needs is affected as a result of increased private education costs, reflect the potential social inequalities that can result from cost-recovery policies (Colclough, 1996, p. 597).

Ignoring the reaction of the poorest families to increases in the cost of private education means underestimating the impact that the cost of schooling may have on students abandoning their studies early, a circumstance that is particularly common in secondary education (CEPAL, 2002, p. 122). If to this we add the fact that a reduction in a particular family's income will increase the need for the children of the house to provide financially,¹⁷ the effects on children and adolescents, particularly girls, abandoning their studies become even greater. It should be pointed out in this regard that educational subsidy programmes that are conditional upon school attendance rates may have acted more to alleviate the premature abandonment of studies than as an effective strategy for long-term investment in education.

4.2. Quality of education and perceptions regarding the usefulness of schooling

Debate relating to the quality of education has been a constant factor in the creation of educational policy for development, though it unquestionably became more important when it was seen that it was not so easy to translate the progress achieved in educational expansion into the achievement of the educational targets set. It is no coincidence, for example, that a great number of the international inter-ministerial education conferences held over the last ten years have concentrated specifically on educational quality, or that the Millennium Development Goals establish the need to guarantee not only access to education but also education of a quality that will ensure that educational targets are achieved.

Low quality education makes it impossible for a student to gain the knowledge required in order to guarantee a good educational career and opportunities for social mobility, but it is also the basis on

which social groups build their educational aspirations. In other words, the way a particular society perceives the quality of education available will have a clear influence on the strategy of individual families as regards investing in education. Nevertheless, the possible options are, of course, different depending on the financial and cultural capital available. In other words, while the middle classes will respond to problems of teaching quality by turning to the various alternatives available in the market place (opting out), the poor have to decide whether or not they will continue to send their child to school.

In spite of the fact that the political debate recognises the importance of quality schooling in terms of social perception (and the different options available), the policies included on the "short menu" would seem clearly to disregard this relationship and, above all, the effects of the polarisation of educational systems on perceptions of the usefulness of the different educational opportunities. Indeed, in Latin America, the educational expansion process has run parallel to a process of educational segmentation and polarisation, not only between the public and private sectors but also within the public sector itself (Reimers, 2001; Rivero, 2000). However, government and supranational education policy has not only failed to implement ways of controlling this polarisation process, it has, on many occasions, actually accentuated it. The introduction of poorly controlled subsidies in the private sector, very loose legislation relating to the possibility of opening new schools, a deterioration in teacher working conditions and decentralised education policies that have been developed without the proper mechanisms to offset territorial inequalities have had strong repercussions on the differences in educational quality and, as a result, on the perception of the usefulness of schooling among different social groups.

There is no doubt that in the case of the most disadvantaged groups, access to lower quality educational systems has influenced their perceptions of the usefulness of attending school, and this compounds their financial difficulties, the higher opportunity costs and the need to invest in the longer term. Perceptions regarding usefulness are fundamental to an understanding of the truncated expectations of young people in the schooling system and the different ways in which educational unease is manifested. This is perfectly summarised by Tenti.

¹⁷In calculating rates of return it is common practice to assume that there is no opportunity cost in primary education. See a critique of the calculation method in Bennell (1996).

The clearest and most widely seen symptoms are exclusion and failure at school, discomfort, conflict and disorder, violence and difficulties of integration in the institutions themselves, and above all an absence of any sense of the educational experience for significant numbers of young people and adolescents in Latin America (especially those who come from the most excluded and downtrodden social groups), who find it difficult to enter, progress through and develop in institutions that are not made for them. All the signs would seem to indicate that “they arrive late” at school (excluded adolescents and young people), entering an institution that is foreign to them and which therefore fulfils no function as far as their own specific projects are concerned (Tenti, 2000, p. 2).

5. By way of conclusion: three reflections for a new agenda

This paper has concentrated on an analysis of some of the basic failings of educational policy aimed at development, in order to examine its limitations as a strategy for combating poverty. The observations made allow us to conclude with three final reflections regarding the implications of this analysis and possible new ways in which educational policy can be used to combat poverty and inequality.

Firstly, one may conclude from the foregoing analysis that no educational policy can be effective as a strategy for combating poverty if it fails to take into account the effects of poverty on education. This omission, which persists throughout the various approaches to education policy, not only conditions the central importance of education as a mechanism for breaking the inter-generational poverty cycle, it also explains why, on so many occasions, the policies designed for the most disadvantaged groups give such poor results. Social policies designed to “activate” the poor often place the need for intervention in the category of “cultural deprivation” while at the same time ignoring a set of objective obstacles that restrict any real possibility of the poor developing sustainable forms of investment, such as investment in human capital itself. When these obstacles are recognised, however, the strategy consists of facilitating access to markets that must adapt to the social and economic conditions of the excluded groups (World Bank, 2004), which completely disregards the limitations

that any market has in adapting to the needs of the poor, as well as the limitations of the poor themselves as regards subsistence via access to the formal markets. The debate regarding the “activation” of the poor is also in direct contradiction to selectivist practices like the ones that result from targeting. Due to their restricted coverage, targeting programmes basically reach those groups which, given the sheer depth of their poverty, find it difficult to be “activated” and are only temporarily helped.

There are, therefore, grounds for reviewing the minimum material conditions in which poor families can effectively invest in human capital over the long term and that will provide us with systems that enable us to determine when education policy can actually be effective as a strategy for combating poverty.

The second reflection concerns the relationship between education and social cohesion. This paper has again highlighted the failings in this area and the facility with which correlations are transformed into causal relationships where political recommendations are concerned. The paradigm of the high positive correlation between levels of education and high levels of social cohesion in the countries of Scandinavia is often used as a basic reference in underlining the advantages of education in providing cohesion between social groups. Although this argument also acknowledges the inverse relationship, this hardly ever translates into political recommendations, i.e. the argument for creating a socially cohesive society in order to strengthen educational development. Recognising this relationship does not mean disregarding educational policy but rather displacing it from its central position and placing more importance on real cohesive policies, policies that unavoidably deal with the fight to combat inequality, not only as regards access to the various social assets but also, and more importantly, in terms of the distribution of resources.

This is the path that was followed by the countries of Scandinavia and it represents a mechanism that can effectively ensure that access to education and its expansion will offer a space in which communities can meet and social networks can be strengthened. Without effective policies to counter inequality, education becomes just one more way in which inequalities are expressed, a source of social differentiation and an element in the search for mechanisms that exclude certain groups from taking advantage of this resource. As this

paper has shown, overlooking the inherent inequalities in the provision of education in Latin America has entirely cancelled out the effective opportunities that education offers for social cohesion.

Finally, recent evidence relating to the limitations of educational policy as a mechanism for reducing poverty has highlighted the notion of educability, defined as a set of material, social, cultural and emotional conditions that are required in order to facilitate learning (López, 2004; López and Tedesco, 2002). Taking account of educability represents a highly positive element when assessing the relationship between education and poverty, since it places the emphasis on precisely those factors associated with poverty that prevent the poor from taking advantage of educational opportunities. It therefore means taking account of many of the failings identified in this paper and illustrates the limitations of institutional reforms when it comes to achieving educational successes among the most excluded groups, demonstrating the need to develop multi-sector, multi-dimensional strategies for combating poverty. It also means acknowledging that poverty is not just material and that there are other obstacles to success at school. If the pursuit of conditions that favour educability is to be effective, this also requires the collective involvement of all sides: the state, families, schools and society at large. This collective involvement will offer the joint responsibility required in order to achieve educational activities that will benefit socially excluded sectors and open up the possibility of asking whether the school that accepts poor children is really the school that they need.

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