

# Education Policy Analysis Archives

Volume 6 Number 7

March 30, 1998

ISSN 1068-2341

---

A peer-reviewed scholarly electronic journal. Editor: Gene V Glass Glass@ASU.EDU. College of Education Arizona State University, Tempe AZ 85287-2411 Copyright 1998, the EDUCATION POLICY ANALYSIS ARCHIVES. Permission is hereby granted to copy any article provided that EDUCATION POLICY ANALYSIS ARCHIVES is credited and copies are not sold.

---

## **Educational Research in Latin America: Review and Perspectives**

**Abdeljalil Akkari**  
**University of Maryland Baltimore County**

**Soledad Perez**  
**Geneva University**

### **Abstract**

The present paper consists of four primary sections. First, we describe the historical context of educational research in Latin America. In the second section, we focus on various theoretical frameworks that are applied to educational research in the region. We identify the main institutions involved in this research in the third section. Finally, in conclusion we offer suggestions that we consider to be of greatest priority for the future of educational research in Latin America.

### **Introduction: Historical context**

During the 1930s, many institutions in Latin American countries began to conduct research in the area of education. Shared historical and political ties as well as similarities among educational systems within the region helped facilitate comparative and international studies in Latin America. Since 1958, the Organization of Iberoamerican States (OIS) started to develop numerous studies in different countries, with many publications stemming from this work. However, most research has primarily been descriptive rather than empirical or applied. We found that when strong coordination exists between the local governments and international agencies, the results are more relevant and useful. One such effort is the report, "The demographic, economic, social, and educational situation in Latin America," (United Nations Educational, Scientific, and Cultural Organization or UNESCO, 1962) conducted by the Organization of American States (OAS), the Food and Agriculture Organization of the

United Nations (FAO), the International Labor Organization (ILO), and the Economic Commission for Latin America and the Caribbean (ECLAC).

During the 1970s, the areas of educational research and economic development began to join forces. An example of this union was a program on functional literacy, conducted by UNESCO. Researchers started to evaluate their own work and to examine the effects that their research had on educational development. They found that universal schooling for all children did not exist and that in many ways societies continued to suffer from social inequality, as was the case before governments began to invest in basic education. However, due to the dictatorial atmosphere in Latin America during this period, researchers were limited in conducting innovative research, especially in the realm of education.

Multiple diversification of research began to take place during the period of the '80s and '90s. A wave of democratization across the region acted as a catalyst for this diversification. First, regarding topics and methodology, a stronger emphasis was placed on the disciplines of anthropology, sociology, and psychology. Many groups, such as indigenous populations who were previously ignored by mainstream research, became the subjects of investigation. In addition, there were many new institutions involved in educational research, specifically non-governmental and international agencies.

Presently, the scope of educational research in Latin America is great, including didactic methods of teaching, non-formal education, and adult literacy. However, as suggested by Tedesco (1995), progressive theoretical frameworks and previously implemented educational programs are not alone sufficient in delineating an educational orientation capable of obtaining the goals of democracy and the overall equal distribution of knowledge.

## **Theoretical Frameworks**

While there exist many different theoretical frameworks, we will focus primarily on those that have played an influential role among Latin American educators and researchers. During the period from 1950-1965, the main theoretical framework was based on studies conducted by ECLAC. This agency encouraged Latin America to transform from a traditional society dominated by large land proprietors (latifundios) to a modern one based on productivity and growing industrialization.

In viewing education as a resource for economic development, the agency attempted to apply human resources theory (Shultz, 1981) to countries in Latin America. According to this theory, education is considered primarily as an investment in human capital, with substantial long-term benefits both for the individual being educated and for the community as a whole. During this period the main debate centered around accessibility to schooling and duration of attendance for those children from impoverished and rural areas. In addition, public funding and teacher training were topics of interest during this time (Garcia-Huidobro, 1990).

It is important to recognize that during this period a strong ideological debate was taking place in Latin America, with the central hope being that the Cuban revolution would bring radical social transformation. In reaction to ECLAC's theoretical model, described above, was a more progressive and political approach, one organized around dependency theory (Cardozo & Faletto, 1969). Dependency theory focuses on a macro level of socioeconomic change rather than on an individual level. It is based on the idea that third world societies depend economically on industrialized countries. There is also an element of internal domination that exists between different socioeconomic groups within each country. Dominant groups attempt to perpetuate the situation of inequality

by controlling systems of production and education. However, research linked to this theory does not systematically apply to issues of education.

A third theory, closely linked with the pedagogical work of Freire (1972), emerged during the late '60s and early '70s. While partially influenced by both Liberation Theology and Illich's work (1973), Freire suggested that the main goal of education was "liberation." According to this objective, those individuals involved in education must shift from the status of object (being taught) to the status of actor/subject (learning). According to Freire (1972, 1976), effective education includes theoretical as well as practical knowledge that relates to the local context rather than decontextualized curricula. Empowerment is both the means and the outcome of Freire's pedagogy, which some have come to call "liberatory education."

Another central concept in Freire's work is that traditional Brazilian education is based primarily on "cultural hegemony" (1972). Similarly, Carnoy (1974) proposed a historical critique of education by defining it as "cultural imperialism." In examining the history of education in Latin America, we concur with Freire in that mainstream education in the region works to maintain social, political, and economic domination of subordinate groups. We also agree with Freire's belief that the role of schooling in Latin America contributed to maintaining the poor at the bottom of the social structure. He strongly believed that society shapes school rather than school shaping society. In addition, Freire's involvement was mainly with adult literacy classes. Because the scope of Freire's theory encompasses primarily adult education issues, its pedagogical application is limited in understanding the dynamics of formal schooling in Latin America.

The debate around this theory led scholars to adopt participatory research as a part of their work on education during the 1970s. For instance, Meister (1968) explored how rural populations utilized education to obtain greater access to economic development. In Ecuador, with the help of the Catholic church, local communities created novel radio programs to promote adult literacy. These people became active participants in their education through their involvement in both the conceptualization and the realization of these radio programs.

During the early 1980s, ECLAC proposed a new slogan, "Productive transformation with equity," one that paralleled the increasing democratization of local regimes. There was a shift in focus toward pragmatic goals rather than on global transformation, as previously suggested by ECLAC during the '50s. A key issue involved in this new pragmatism was the priority to narrow the gap between education and the work force. A network was created in the region to identify the relation between education and work (Red Latin American Education and Work). Within this network, there was a great deal of discussion regarding the meaning of both education and work in relation to different socioeconomic groups (De Ibarrola, 1990; Filmus, 1995). In summary, the two main theoretical influences come from ECLAC as well as from remnants of Freire's work. While ECLAC focuses on the quantitative side of improving basic education, Freire's theory relates well to adult literacy but remains limited when applied to formal schooling.

## **Sources of Institutional Research**

This section does not provide an exhaustive description of all institutions involved in educational research throughout Latin America, but instead focuses on exemplary cases. In most of the countries, we will distinguish between four sources of institutional research: a) state agencies, b) universities, c) non-government organizations

(local, international, religious, etc.), and d) foreign aid agencies.

### **State agencies**

Most countries in Latin America have specific agencies that are responsible for educational research. These agencies are typically related to the Ministry of Education. An example is the National Institute of Educational Studies and Research (INEP), previously named the National Institute of Pedagogical Studies, created in Brazil in 1938. Since its inception, the institute has been responsible for the continual publication of the Brazilian Journal of Educational Studies, one of the main sources of information and analysis regarding Brazilian education. At a research level, INEP supported an average of 24 research projects a year from 1972 to 1982. This is an insufficient number in comparison to the need of the population of 160 million inhabitants.

In the region as a whole, state agencies played a dynamic role in educational research during the '60s and '70s. However, this funding and support gradually decreased over time. As a first measure the National Institute of Educational Research (INIDE) in Peru was initially the target of budget reduction and was subsequently closed. While in 1977 there were 90 research projects under way, by 1985, there were only 50 projects remaining. Presently, the National Agency of Educational Research and Teacher Training (DINIC) coordinates educational research mainly on psycho- pedagogy and the sociology of education. This same situation occurred in Chile, with support for the Center of Improvement, Experimentation, and Education Research (CDEIP) being severely cut in Santiago. Similarly, in 1968 the Colombian Institute of Pedagogy (ICOLPE) was closed and replaced by the Colombian Fund of Scientific Investigations and Special Projects (COLCIENCIAS).

Those researchers involved in Latin America agree that there is no need to create more institutions but rather to increase coordination among the already existing institutions (Pizarro, 1990). There are various new centers that provide resources as well as help to facilitate research through offering access to technological information such as databases and on-line publications. An example of such a center is the Caribbean Research Information Service (CERIS), located in Trinidad and Tobago. This center focuses on four primary goals (Velloso, 1996):

1. gathering information related to the structure of educational systems
2. collecting information related to current research on education
3. constructing an annotated bibliography on completed research
4. identifying potential sources of information

### **Universities**

In many cases, Education Departments are responsible for the majority of research activities. Currently in Brazil, universities conduct approximately 80% of the research, while the remainder is carried out by non- governmental organizations and municipal agencies. However, previously there was a paucity of experienced researchers in Brazil; it was not until the late '70s that graduate programs in education were developed.

In 1981, 22 different universities offered a total of 27 graduate programs in education (549 masters theses and 10 doctoral dissertations). Velloso (1996) suggests that we have had a quantitative gap during the last decade, with 4,000 masters theses and 400 doctoral dissertations completed in the following universities: the Federal

Universities of Minas Gerais, Rio Grande do Sul, Rio de Janeiro, and Fluminense; the State Universities of Sao Paulo and Campinas; the Catholic University of Sao Paulo. In Chile, the Education Departments in the Catholic University of Chile and the University of Chile conduct research primarily on educational policy and planning. In the Caribbean region, research in education was initiated in 1954 with the birth of the Educational Research Center, affiliated with the West Indies University.

Due to the increasing number of students enrolled in education programs throughout Latin America, professors have had to focus more on teaching rather than research. In addition, professors are able to obtain tenure once they have completed their masters degree, and without mandatorily proceeding with any doctoral research. During the last decade, there have been many initiatives aimed at increasing both the quantity and the quality of educational research and to promote communication between scholars. For the past fifteen years, the National Brazilian Association for Graduate Studies in Education (ANPE) has held annual meetings as well as regular workshops on specific topics where researchers come together to discuss and share their current work on education. In addition, there are two federal organizations in Brazil, the National Council of Scientific and Technological Development (CNPq) and the Commission of Advancement and Training of University Personnel (CAPES), that send students abroad to study in doctoral programs and evaluate local graduate programs. In Chile, the Ministry of Education initiated the Program for the Improvement of Quality and Equity of Education (MECE), a project that combines the efforts of policymakers and researchers and encourages more applied projects. With the help of the World Bank, Paraguay also adopted this initiative to improve the quality of secondary schools. Finally, on a more regional level, there is an academic organization, the Latin American University of Social Sciences (FLACSO), that supports cooperative research among universities throughout Latin America.

### **Non-governmental organizations (NGOS): Local, international, religious**

During the last decade, nongovernmental organizations (NGOS) have played a greater role in educational research in Latin America. In Chile, for instance, NGOs are the main resource for studies in the area. The Research Center on Educational Development (CIDE), founded by the Catholic Church in 1964, presently includes approximately twenty researchers with doctoral degrees who are working on projects that are funded by both local and foreign agencies. This center is responsible for coordinating the Latin American Educational Information and Documentation Network (REDUC), an organization that collects and disseminates periodical information on educational research in seventeen different countries (Analytical Abstracts on Education - RAE). There is a similar NGO in Mexico, the Center of Educational Studies (CEE), that offers the most complete database on educational research in Mexico. In Brazil, the Carlos Chagas Foundation in Sao Paulo is involved in both traditional as well as more innovative research projects, such as a project on ethnicity and education. In addition, this foundation publishes an international journal, *Cadernos de Pesquisa*.

Multinational corporations have traditionally been involved in funding educational projects, but more recently they have begun to participate in new projects that also include a research dimension. For example, the Swiss Foundation for Sustainable Development (NOVARTIS) provides funding for and monitoring of community centers for street children. Another example can be found in a distance learning program, "Telecurso 2000," sponsored by the Roberto Marinho Foundation, a project based around three primary goals: contextual teaching (*ensino em contexto*),

development of fundamental competency, and citizenship empowerment. Latin American NGOs receive the majority of their funding from foreign sources. CIDE received 60% of its funding from sources outside of Chile (Velloso, 1996). Similarly, the Carlos Chagas Foundation in Chile received many contributions from the Ford Foundation. The International Center for Research on Development (ICRD), a Canadian organization, offered substantial funding to local Latin American NGOs during the last twenty years. One research project that was recently funded investigates survival strategies for marginalized groups in the workplace in Uruguay (Lemez, 1997).

### **Foreign aid agencies**

Regional and international foreign aid agencies have participated in educational projects since the '50s. One project, Development and Education in Latin American and the Caribbean (UNDP, 1981), supported by three different international agencies, ECLAC, UNESCO, and the United Nations Development Program (UNDP), offered a comparative perspective of education among the countries in the region. More recently, the World Bank has come to play a predominant role in financing educational projects in the region (Coraggio, 1995). Between 1990 and 1994, the World Bank was responsible for contributing \$1.1 billion annually to educational projects in Latin America (MacMeekin, 1996). Preceding the World Bank, the three principal funding agencies are the Inter-American Development Bank (IDB), the Japanese Agency of International Aid, and the USA International Agency (USAID).

The Nordeste Project in Brazil is a typical example of the World Bank's involvement in education. It is the largest investment of the World Bank in Brazil. During the next four years, \$736.5 million will be allocated to improve the quality of primary school education (ensino fundamental de 1 a 4 serie). Due to the fact that 30% of children between seven and fourteen years are not attending school and that only 76% of adults have less than four years of schooling explain the need for such an investment in education (MEC, 1996). However, in examining the general orientation of this project, we do not believe that it will improve the local educational situation. First, the project does not have a sufficient research team that would be able to properly evaluate relevant problems in local schools. The philosophy underlying the project lacks a global understanding of the relationships between education and society, and instead focuses on fragmented and quantitative goals within the formal schooling system. The overriding theme of the World Bank's Nordeste Project revolves around material and human management. While one third of the funds have already been allocated toward the purchase of 47 million textbooks (Sanjuro, 1996), these materials are primarily designed and manufactured in industrialized southern Brazil, a context very different from the local rural one. While the project's main focus is education, we believe it also needs to consider and incorporate the fact that land is unequally distributed within the surrounding region. However, as suggested by Coraggio (1995), the redistribution of productive resources among different socioeconomic groups is not a priority of the World Bank.

By examining different sources of institutional research, we are able to identify some general tendencies that are common across Latin America. First, while state agencies previously had a substantial role in educational research, they are presently downsizing their research capacity. Second, universities have maintained their position, especially in relation to countries in which there is a strong academic tradition. Finally, with contributions from private and public foreign agencies, NGOs have increased their research capacity.

## Future Perspectives

Highlighted in both electoral campaigns and official documents, education seems to be the main priority in many Latin American countries. However, in viewing the actual educational situation in the region as a whole, we can see that there still remains a great deal more that needs to be accomplished. Central America is particularly affected, with 1.5 million children still outside of the school system. Indeed, the previous objective of generalization of primary education has yet to be reached, especially for indigenous children, poor children, and those living in rural areas. As pointed out by Puryear (1996, p.3), "Latin America's primary and secondary schools are sharply segmented by economic status, with the poor consigned to the public system while the rich and most of the middle-class attend private schools." As previously stated, there is a need for a new approach to education in Latin America that supersedes both the human resources theory supported by ECLAC as well as Freire's pedagogy of adult literacy.

The schooling system is structurally divided into two separate networks: private and public. This division parallels Baudelot's and Establet's (1971; 1975) conceptualization of the French school system. The separation found in their work is between primary education- professional training and secondary education-university. Children from working class families are confined to the first network while children from an upper-class background are likely to reach levels of secondary and university education. Another parallel can be found in Serpell's analysis of schooling in Africa. Serpell argues that, "...the narrowing staircase model of schooling, which informs the prototype of Institutionalised Public Basic Education (IPBS) combines a metaphor of the individual's developmental progress as climbing a staircase with a conception of the social function of schooling as the recruitment of an elite by gradually extracting them from humble origins into a privileged upper class" (Serpell, in press). In this way, schooling in many third world countries functions in an "extractive manner," working against "the principle of local accountability in both the economic and the cultural sphere."

We see that in as early as the primary school years, there already exists a fundamental qualitative difference between public and private education in Latin America. We can easily observe that classrooms are overcrowded and that teachers have minimal training in many public schools. Numerous children drop out of the system prematurely and some of them later go on to some type of nonformal education.

We also observe a strong residential segregation in Latin American countries. Regions are made up of distinct socioeconomic groups that are very different from each other and children within the public school sector have very little opportunity to interact outside of school with children who attend private schools. It is as if there exist two parallel processes of socialization, and this poses a challenge for those citizens who live together and are working toward a common future. Hence, one main goal of educational research in Latin America is to first investigate the existing segregation and later reconstruct a new model of public education. Accomplishments such as these will be relevant to educational issues in other third world countries because of the increasing deterioration of the quality of public education and the tendency for children from upper-class families to obtain private rather than public education.

## References

Baudelot, & Establet. (1971). *L'cole capitaliste en France*. Paris: d. Maspero.

- Baudelot, & Establet. (1975). *L'cole primaire divise*. Paris: d. Maspero.
- Cardozo, F. H., & Faletto. (1969). *Dependencia y desarrollo en America Latina*. Mexico: Siglo XXI.
- Carnoy, M. (1977). *La educacion como imperialismo cultural*. Mexico: Siglo XXI.
- Coraggio, J. L. (1995). Educacion y modelo de desarrollo. In CEAAL (Ed.), *Construccion delas politicas educativas de Americas Latina*, (pp. 83-131). Lima: Tarea.
- De Ibarrola, M. (1990). Proyecto socioeducativo, institution escolar y mercado de trabajo: el caso del Tecnico Medio Agropecuario. Unpublished Doctorado, UNM, Mexico.
- Freire, P. (1972). *The pedagogy of the oppressed*. Harmondsworth: Penguin.
- Freire, P. (1976). L'alphabetisation et le "reve possible". *Perspectives*, vol VI, pp. 70-73.
- Garcia-Huidobro, J., Tellet, F. & Ochoa, J. (1990). Tendencia de las investigacion educacional en America Latina. Santiago de Chile: CIDE..
- Illich, I. (1973). *Deschooling society*. Harmondsworth: Penguin.
- Lemez. (1989). La educacion y las estrategias sociales de sobrevivencia en el mercado de trabajo. Montevideo: Centro d'investigacion y Experimentacion Pedagogica (CIEP).
- McMeekin, R. (1996). Coordinacion de la asistencia externa para la educacion en America Latina y el Caraibe. *Boletin del Proyecto Principal de Educacion*, abril(39), 20-54.
- MEC. (1996). Proyecto Nordeste. Brasilia: Ministerio da Educacao e do Desporto.
- Meister, A. (1968). *Participation, animation, dveloppement*. Paris: Ed. Anthropos.
- Pizarro, J. (1990). Investigacion de la Educacion en Algunos Paises de America latina . Ottawa: Centre international de recherche pour le dveloppement (CIRD).
- UNDP (1981). Dveloppement et ducation en Amrique latine et les Carabes. Paris: Unesco
- Puryear, J. M. (1996). Education in Latin America: Problem and Chalenges (Working Group on Educational Reform). New York: Concil on Foreign Relations.
- Sanjuro, R. (1996). Distribuicao do livro didactico no Nordeste brasileiro (Projecto Nordeste ). Brasilia: MEC.
- Schultz, T. W. (1981). *Investing in people. The economics of population quality*. Berkley: University of California Press.
- Serpell, R. (in press). Local accountability to rural communities: A challege for educational planing in Africa. In F. Leach and A. Little (Eds.), *Schools, Culture and Economics in the Developing World: Tension and Conflict*. New York: Garland.



Tedesco, J. C. (1995). *El nuevo pacto educativo. Educacion, competitividad y ciudadania en a sociedad moderna*. Madrid: Grupo Anaya.

UNESCO. (1962). *Situacion demografica, economica, social y educativa en America Latina*. Paris: UNESCO/CEDES.

Velloso, J. (1996). SERI and capacity building in educational research in Latin America and the Caribbean. In SERI (Ed.), *Educational research in the South: An Initial Review* . Paris: International Institute for Educational Planning.

## **About the Authors**

### **Abdeljalil Akkari**

University of Maryland Baltimore County  
Email: [akkari@umbc2.umbc.edu](mailto:akkari@umbc2.umbc.edu)

Dr. Abdeljlil teaches courses in multicultural education and sociology of education at Fribourg University (Switzerland). He developed research in Tunisia and Brasil on the relationships between education and development. He is currently as a visiting professor in the Psychology Department of the University of Maryland Baltimore county.

### **Soledad Perez**

Geneva University  
Switzerland

Email: [perezs@fapse.unige.ch](mailto:perezs@fapse.unige.ch)

Dr. Soledad Perez teaches comparative education at the University of Geneva (Switzerland). She is a specialist of Latin American educational systems. She has done research on rural communities in Equator. She collaborated with international organizations on several projects related to education in Latin America, Europe and Africa.

---

Copyright 1998 by the *Education Policy Analysis Archives*

The World Wide Web address for the *Education Policy Analysis Archives* is <http://olam.ed.asu.edu/epaa>

General questions about appropriateness of topics or particular articles may be addressed to the Editor, Gene V Glass, [glass@asu.edu](mailto:glass@asu.edu) or reach him at College of Education, Arizona State University, Tempe, AZ 85287-2411. (602-965-2692). The Book Review Editor is Walter E. Shepherd: [shepherd@asu.edu](mailto:shepherd@asu.edu) . The Commentary Editor is Casey D. Cobb: [casey@olam.ed.asu.edu](mailto:casey@olam.ed.asu.edu) .

## **EPAA Editorial Board**

[Michael W. Apple](#)  
University of Wisconsin

[John Covaleskie](#)  
Northern Michigan University

[Alan Davis](#)  
University of Colorado, Denver

[Mark E. Fetler](#)  
California Commission on Teacher Credentialing

[Thomas F. Green](#)  
Syracuse University

[Arlen Gullickson](#)  
Western Michigan University

[Aimee Howley](#)  
Marshall University

[William Hunter](#)  
University of Calgary

[Daniel Kallós](#)  
Umeå University

[Thomas Mauhs-Pugh](#)  
Rocky Mountain College

[William McInerney](#)  
Purdue University

[Les McLean](#)  
University of Toronto

[Anne L. Pemberton](#)  
apembert@pen.k12.va.us

[Richard C. Richardson](#)  
Arizona State University

[Dennis Sayers](#)  
University of California at Davis

[Michael Scriven](#)  
scriven@aol.com

[Robert Stonehill](#)  
U.S. Department of Education

[Greg Camilli](#)  
Rutgers University

[Andrew Coulson](#)  
a\_coulson@msn.com

[Sherman Dorn](#)  
University of South Florida

[Richard Garlikov](#)  
hmkhelp@scott.net

[Alison I. Griffith](#)  
York University

[Ernest R. House](#)  
University of Colorado

[Craig B. Howley](#)  
Appalachia Educational Laboratory

[Richard M. Jaeger](#)  
University of North  
Carolina--Greensboro

[Benjamin Levin](#)  
University of Manitoba

[Dewayne Matthews](#)  
Western Interstate Commission for Higher  
Education

[Mary P. McKeown](#)  
Arizona Board of Regents

[Susan Bobbitt Nolen](#)  
University of Washington

[Hugh G. Petrie](#)  
SUNY Buffalo

[Anthony G. Rud Jr.](#)  
Purdue University

[Jay D. Scribner](#)  
University of Texas at Austin

[Robert E. Stake](#)  
University of Illinois--UC

[Robert T. Stout](#)  
Arizona State University