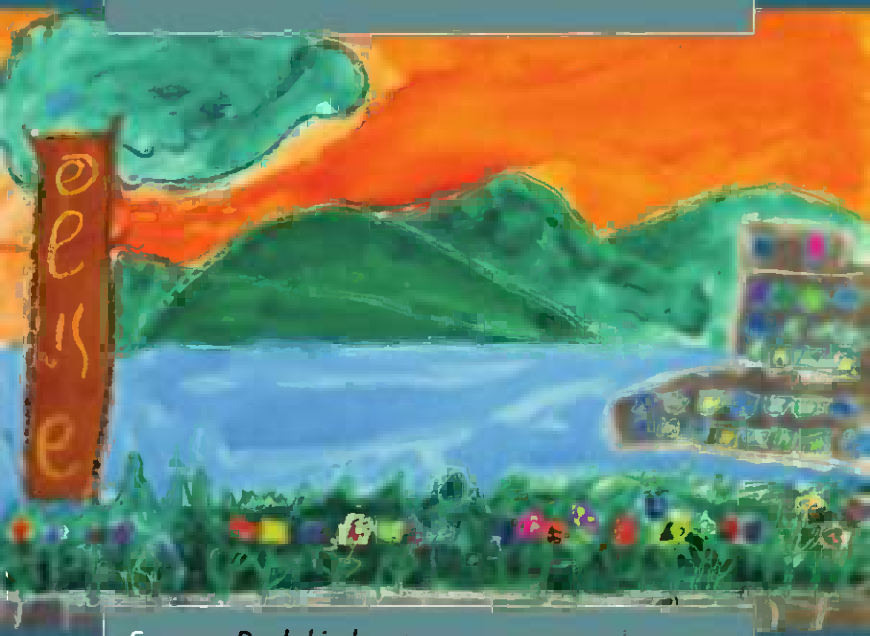
COMPARATIVE AND INTERNATIONAL EDUCATION: A DIVERSITY OF VOICES

Quality and Qualities

Tensions in Education Reforms

Clementina Acedo, Don Adams
and Simona Popa (Eds.)



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QUALITY AND QUALITIES: TENSIONS IN EDUCATION REFORMS

COMPARATIVE AND INTERNATIONAL EDUCATION:
A Diversity of Voices

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Scope

Comparative and International Education: A Diversity of Voices aims to provide a comprehensive range of titles, making available to readers work from across the comparative and international education research community. Authors will represent as broad a range of voices as possible, from geographic, cultural and ideological standpoints. The editors are making a conscious effort to disseminate the work of newer scholars as well as that of well-established writers.

The series includes authored books and edited works focusing upon current issues and controversies in a field that is undergoing changes as profound as the geopolitical and economic forces that are reshaping our worlds.

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Quality and Qualities: Tensions in Education Reforms

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DON ADAMS, CLEMENTINA ACEDO AND SIMONA POPA

IN SEARCH OF QUALITY EDUCATION

INTRODUCTION

For the last few decades, increasing international and national attention has been directed toward education quality, its meaning, its measurement, and its status as an integral goal in the design and implementation of educational reform. Coming to an understanding of quality education involves careful analysis of the context from which any particular reform or program emerges and of the continuing struggle to define and achieve it (Adams, 1993). In practice the definition depends in part on a series of additional choices, including the level of education under reform, who conducts the research, and importantly, who participates in the policy-making process. As Ginsburg et al. (2001) observe, the educational stakeholders concerned with quality will rarely make their choices consciously or freely. Rather, "ideologies and resource distributions" make having some choices impossible and choices may have "to be negotiated among the different individuals and group actors" (p. 21).

This chapter reflects an interpretation that much controversy persists concerning the concepts of development, quality, and measurement: the main actors, objectives, and desired outcomes. A case can be made that there is incremental improvement in the dialogue between the margins of the main conflicting groups of participants. A case can also be made that the chasm between the centers of the movements remains great. The main issues between conflicting groups often relate to the level of commitment to issues related to equity and gender, and particularly to disadvantaged populations. However, goals and programs to promote equity do not necessarily conflict with policies to promote quality. High quality education systems or programs should also seek equitable treatment of students. Indeed equity could be viewed as one requisite of quality. What is important is to determine the source or origin of the inequality in knowledge, skills and ability. What are the factors which have created inequalities in learning achievement? What deficiencies in the system can create barriers to learning? Strong teachers, using appropriate pedagogy, should be expected to teach every student to the highest possible level of learning.

The Jomtien Framework for Action (World Conference on Education for All, 1990) specifically recommended that countries set national targets for improvements in learning achievement. By explicitly addressing quality of

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education, subsequent studies have found evidence about specific factors that affect learning, such as curriculum alignment and implementation, effective schools, provision of learning materials, instructional time, teacher quality, and children's readiness to learn (Lockheed & Vespoor, 1990). In practice, however, analyses of education reforms reveal significant variations across countries in their definitions of educational quality and in the actions and programs used to attain national and local objectives, which are often influenced by major political, demographic, social, and cultural changes. To deliver quality of education will require that changes occur at various levels and in various aspects of the educational system. The following chapters will illustrate the struggles, successes, and problems encountered in seeking to define, and extend, quality education. The present chapter situates the struggle to define and achieve quality of education in the evolving context of development.

The authors draw insights and ideas from a range of readily available publications by UN agencies and UNESCO specifically.

THE EVOLVING CONCEPT OF DEVELOPMENT

The evolving conceptualizations of development and globalization provide the context for, and give impetus to, the struggle to define and foster quality education. Table 1 attempts to capture broad changes in nine dimensions as models of development have been redesigned over time to cope with new goals, priorities, and challenges. As shown, strategies for development have moved from a focus on economic growth and basic needs toward an emphasis on institutional capability, economic growth, and social globalization. With these changes over time, the trends in educational policies have shifted from an emphasis on access to schooling toward increasing the quality of basic education and most recently toward a priority on expanding post-basic education. However, the process of development remains a much contested concept.

Strategies for attaining economic and social growth reflective of the newer development model labelled "economic and social globalization" appear to have been strongly influenced by multilateral agencies. Of particular influence are the World Bank, regional banks, and the UN agencies, as they assisted national governments in their attempts to: (a) reverse traditional patterns of centralized dominance of educational decisions; (b) extend social participation and opportunity; and (c) demonstrate good governance and institutional efficiencies. Clearly, even greater challenges and higher expectations for the contribution of education are found in the newest model in Table 1.

There are at least three major implications of the globalization model for education policy, planning, and practice: (a) the increased centrality of education in national development policy and planning; (b) the increased focus and priority on decentralization and localization with further empowerment of teachers and administrators; and (c) the trend toward an emphasis on, and assessment of, education quality at all levels.

Table 1. Dimensions and models of development: 1970 –2010

Model	*Economic growth*	*Economic growth and basic needs*	*Institutional capability*	*Economic and social globalization*
Dimension				
Goals	Economic change, sustaining economic growth	Economic change, sustaining economic growth, economic stability, meeting basic health and educational needs	Democratic processes and open, transparent governance Poverty reduction, social development, social inclusion, economic growth, productive assets	Educational quality, global competitiveness, lifelong learning, global citizenship, local voice
Policies	Centralized control Investment in technologies, human capital, technical and higher education	Mixed central and local control Investment in technologies, human capital, basic education for all, nutrition and health programs, development of local economies	Strengthened civil society and knowledge economy Basic education and work training, health programs, political training, public and private partnerships, girls' education, and transnational education	Post-basic education, tertiary and lifelong education, extension of information economy, public-private partnerships, university-industry linkages, transnational education, private tutoring Lifelong education on demand, globalized basic education, education without borders
Planning and decision mode	Top-down, government-driven, public, technocratic	Top-down, public, technocratic, with some decentralization	Bottom-up, transactive, participatory, generative, transparent political process	National vision and goals, localization of management, formal and informal networks, increased market forces, wider range of stakeholders International vision and goals,

Model	*Economic growth*	*Economic growth and basic needs*	*Institutional capability*	*Economic and social globalization*
Dimension				
				global language, global histories
Evaluation	Pre- and post- testing: expert-driven and quantitative	Pre- and post- testing: expert-driven and standardized	Inclusion of participatory, ongoing, qualitative research	Local reviews, local choice, national standards, national and international tests Global indicators, global thinking, global standards
Outputs	Satisfactory growth	Satisfactory growth; safety nets for the poor	Reduction in number of poor, increased assets of the poor, empowerment and reduced corruption, local ownership	Skills in science and mathematics, competence in world language, meta-cognitive skills, world-class ranking Global and local thinking across disciplines
Outcomes	Higher per capita income	Higher per capita income, equitable basic educational opportunities	Increased local capacity, improved well-being of the poor, equitable social capital	Knowledge-based economy, global competition Continuous, innovative educational change Commitment to global standards, and to global and local social and technical solutions
Change process	Exogenous	Largely exogenous	Endogenous	Endogenous and exogenous School-based initiatives, extra-school learning, endogenous and exogenous learning initiatives,

Model	*Economic growth*	*Economic growth and basic needs*	*Institutional capability*	*Economic and social globalization*
Dimension				
				school and global community-based learning
Sustainability	Little focus on implementation and sustainability	Increasing concern for implementation and sustainability	Implementation and high sustainability integral to model	Political support, sustainability of innovation, creative and productive institutions Local, national, and international support
Constraints/ limitations	Uneven growth, high level of dependency	Frequent exclusion of the very poor, limited employment opportunities for poor in globalized economies, limited social development	Need for high rate of capacity building, strong political will, access to accurate information, and ability to cope with change	Global and local utilization of human resources, level of vision and effectiveness of parental and stakeholder involvement, fiscal resources Competition for scarce resources, fear of change, persistence of global conflicts

As the national and global social contexts have evolved and educational opportunities have expanded, the foci of educational discourse, policies, and priorities also have been changing. As shown in Table 1, the role of education looms large and has been portrayed positively across the many changes. However, the new globalization model identifies education as a primary centerpiece and a requisite for fulfilling many individual, familial, and national aspirations. In this model, education systems redefine their programs by recognizing changing patterns of work and leisure, and the growth of civil society. Some efforts also are being made to involve, and at times, focus on communities. The range of expected involvement of communities in such discourse has been disappointing to some observers. The suggestion has been repeatedly made by *Development,* the journal of the Society for International Development (SID), that there is a need to ask questions seeking deeper insights into the lives of ordinary people.

Implied in the new model are ambitious changes at the very core of the organization, governance, management, curriculum, pedagogy, and practice of education. The model further assumes extensive supporting political commitment outside the system, continuing bureaucratic support at all levels, strong incentives within the system, relevant information and supporting research and effective intersectoral networks which provide guidance and support. In terms of education priorities, the most recent trends indicated in this model of development have meant a refocus on the early grades of schooling as well as post-basic education. The newer functions of higher education are extending beyond the traditional roles of teaching and research. In the new global economy, universities not only produce high-level manpower but also develop a range of linkages with industry to engage in the development and assimilation of new technologies.

THE EVOLVING ROLE OF THE STATE: FEWER MANDATES AND MORE INCENTIVES

Katz (2001, p. 237) maintains that "the value of the welfare state as a normative concept … has effectively been destroyed. The image of welfare has been shifted from its positive connotations in supporting the common good to a negative association with the undeserving poor". Grubb and Lazerson (2004) suggest a new or replacement of the current welfare state. "The Foundational State … would provide the preconditions of foundations for a richer, more equitable version of the Education Gospel. The Foundational State would encompass a range of policies and goals: overcoming barriers to opportunity within schools; strengthening quasi markets in education" (p. 214). The term *foundational state* suggests that the government ought to take broad responsibilities for the well-being of its citizens. Actions would include the development of effective and equitable schooling and lifelong education for all. Exclusion, even partial exclusion, on any grounds, would be morally unacceptable.

This emerging approach to development, at least in rhetoric, goes well beyond the interpretations in most of the literature emphasizing only economic growth and basic needs. In the newer development model, the outlines of a localized participatory model for policy and planning are beginning to emerge. This trend is hastened by national policies and international trends in decentralization, publicized by the grassroots experience of NGOs and other organizations working in local health, education, and rural development, expedited by the marketplace; recently, these have been strongly encouraged by the changing priorities of major international donors.

In the emerging model, human capital concerns continue to dominate the policy dimensions. However, the additional concepts of cultural capital and social capital have become part of the broader capital concept. Implementation, monitoring, and valuation of the development process and sector reform, and therefore the measurement of education outputs and outcomes, have been freed from an exclusive preference for narrowly defined quantitative approaches, e.g., a preference for "objectively verifiable indicators", to giving encouragement for inclusion of a wide range of research methods at the school, community, national, and global levels. Much of the success and legitimacy of the new development model is assumed to lie in redefining the national and local educational roles emphasizing local, participatory responsibilities and school-level inquiry. Thus accountability is viewed as important to the processes of policy making, planning, assessing, and sustaining change in serving both local and national aspirations and expectations.

In recent decades, policy papers prepared by the World Bank, the Asian Development Bank, USAID, and UNESCO have suggested that education is indisputably accepted as an essential element in economic growth, in individual and familial health, and in the provision of skills for the labour market. The educational level of a population is recognized as a major indicator of the investment climate. Investment in the education of women is expected to yield not only valuable increases in human capital but also high development dividends in the form of, for example, lower infant mortality rates, improved child nutrition, and a greater likelihood of enrolling all children in schools. Educational opportunities for girls have shown some increase at lower levels of education. However, significant gender bias persists in higher education and in leadership positions in the workplace.

Modifications and extensions of development goals have meant that the ideas of economic growth and of addressing basic needs, most explicitly in health and education, gained importance in the 1970s and remain a current priority. More recent work has introduced the notion that development is a means to improve the lives of human beings, emphasizing the role of education in developing human capacities that lead to wider forms of participation and improving the life chances of the poor and those who are most excluded. An inclusive quality education can thus have redistributive effects towards a fairer society (Acedo, 1999; Sen, 1996). Another change in emphasis recognizes the strong inhibiting effects of government corruption and the importance of honest, effective governance as a context for

endogenous change. The emerging overarching goals of most development agencies and many developing countries have become poverty reduction and, most recently, improvement in education quality, a condition which may be achieved both through empowerment of the poor in processes of social development and social inclusion as well as in economic growth. Yet much controversy about development remains, and the discourse on education's future continues. The trend toward decentralization is viewed as a necessary condition for successful and accountable education governance. Education governance provides for effective policies and institutions which would include support for public sector management at all levels, and legal and judicial reform, for improvement in public accountability. Governance also is expected to promote processes and procedures for more effective participation in decision making in order to promote equitable and inclusive growth (Behrman, Deolalikar, & Soon, 2002).

Advocates claim that empowerment of administrators and teachers within a decentralized pattern of administration makes continuing educational change possible and can lead to higher enrollments and better quality schools. The argument goes as follows: "When communities can hold teachers, administrators and government officials accountable through formal institutional mechanisms, community members become more interested in school improvement—more willing to commit their own resources to the task" (Narayan, 2002, p. 231). Such empowerment thus transforms the way schools operate, making them more directly accountable to students, parents, and communities. However, as will be described later, given the growing influence of national and international tests, schools may become increasingly accountable to the higher levels of educational bureaucracy in terms of educational standards.

A focus on improvements in quality at all educational levels fits well into the newer model of development. In support of an information economy, newly focused attention is particularly given to post-basic, tertiary, and lifelong education. The extension of the role of the private sector in education and an increase in private tutoring is to be expected. Public-private partnerships, university-industry linkages, and transnational education will increase and take many forms.

In the competition for funds, quality still may have to continue to compete with access. Though both have political appeal, expanding access in the poorer countries, in some cases, may be more politically saleable than raising quality. Increasing access conveys an egalitarian value while raising quality may appear to be exclusionary. Consequently, maintaining the commitment to quality improvement may be difficult, particularly during times of economic uncertainty. A major challenge is how to keep education quality high on policy agendas and a public concern at all levels of governance.

THE EXPANDED ROLE OF THE PRIVATE SECTOR AND THE CIVIL SOCIETY

The traditional set of actors making educational policy has been significantly altered in many countries. There has been an increase in the number of

stakeholders and the range of stakeholder involvement. Although the private sector has had a long and often distinguished history in many countries, elsewhere private involvement in educational policies and administration of education is relatively new.

A growing number of formal and informal public-private relationships have been formed, linking public and private efforts in education. These linkages have often extended the provision of educational opportunities. Patrinos and Sosale (2007) conclude that the impetus for the growth of public-private partnerships "originates from increasing and competing demand on the state; constrained resource environments; diverse and differentiated demand for educational services; and the consequent need for the private sector to share a public responsibility: that of financing and/or providing education" (p. 1).

Informal as well as structured parent and public involvement reflects both the increasing interest in education and the newer trends in governance which encourage widespread participation by the civil society in education. Crişan (2008) highlights a number of evolutions in society's increasing role in education. Public perception and interest towards education have increased significantly in the last 15–20 years.

Education has become much more than before a "public matter" but also a space for exercising social and corporate responsibility. For the public, civil society (CS) included, it was not sufficient any more to be just a passive "beneficiary" of educational services; CS has gradually taken and currently takes over a number of more active roles; as a consequence, it gradually becomes a generator of social *responsibility* towards education.

The explanation for this shift is simple: the "space" between the "realm of education" and "the world of real life" (e.g., the 'world of employment'), between school and society has gradually become smaller and smaller (p. 182).

One important concern often associated with civil society in many nations, and most particularly with multi-ethnic nations having democratic aspirations, is social cohesion. Examining the relations of education and social cohesion, Heyneman (2008) explains:

> School systems affect social cohesion through four mechanisms: (i) through the formal curriculum which adheres to social norms; (ii) by sponsoring a climate within the school which is consistent with those norms; (iii) by successfully adjudicating the differences across social groups on what and how to teach; and (iv) by successfully convincing the public that the opportunity offered to their children is 'fair'. (p. 93)

However, education systems may be part of the problem as well as a contributor to the solution. To varying degrees, education systems and individual schools reproduce the values, attitudes, and social relations of the larger society. In this manner they may reduce, perpetuate, or strengthen many of the conditions that underlie civil conflict. Thus schools may need to be explicitly proactive both in developing the curriculum and in fostering a positive social environment.

DEFINING AND MEASURING EDUCATION QUALITY

Beginning with the Universal Declaration of Human Rights adopted by the UN General Assembly in 1948, the UN Group, particularly UNESCO, took early international leadership in defining education goals. This declaration included the right of all to education. In a vision, bold at that time, this document stated that elementary education was to be made free and compulsory for all children in all nations. Clearly and reasonably viewed as a long-term goal, this objective was restated subsequently on many occasions by international treaties and in the United Nations conference declarations. However, many of the earlier declarations and commitments were silent about the quality of education to be provided.

Robin Alexander, in his monograph, *Education for All: The Quality Imperative and the Problem of Pedagogy*, presents important, timely, and strong criticisms of some of the current international literature on educational quality, and its definitions and use. His purpose is to "investigate the empirical and conceptual basis for accounts and indicators of quality, arguing the importance of national culture and circumstances alongside international pedagogical research" (p. vii). He provides several examples of the limitations of the definitions of quality education offered by various international bodies including UNESCO and the OECD.

As for indicators of quality, Alexander asks the question: "Who at each level of the system needs to know what in order that quality can be assured?" (p. 16). However, the answer to this question may vary by location and over time. Possibly in the past the answer could have been: x for teachers; y for administrators, and y or z for policy makers.

Currently, however, this question may not be so easily answered.

Drawing a line between the knowledge needs of teachers, administrators, and parents is becoming a more difficult task. In several countries strong educational programs are being financially supported which engage parents and other citizens in education decisions. At the local level parents and citizen committees have become significant actors in both choices of policy and in the processes of implementing educational changes. Additionally, 'hybrid' conferences of various relevant experts and citizens are gaining momentum as an important part of planning for and defining major decisions.

The focus on access and inputs also matters. In the early post–World War II decades, the education emphasis of the UN agencies, like that of other multilateral organizations, was focused largely on extending school access to a complete first level of education. In 1990, the World Declaration on Education for All (EFA) (UNESCO, 1990) reinforced the priority on education as a human right and set priorities to accomplish universal primary education by the year 2000. The priority for primary education was supported by several multilateral organizations and national governments, both in terms of goals of equality of educational opportunity and later as one strategy in poverty reduction. Most recently, the first educational level has been emphasized within a strategy for localization of education decisions. The established goals clearly fall within the generalizations found in the

globalization model in Table 1. Subsequent UNESCO publications stated that the goals of EFA in 1990 had implied quality education for all, and although the publications of the organization continued the focus on education as a human right, UNESCO also entered the discussion and debate over the meaning of education quality.

At the 2000 UNESCO World Education Forum in Dakar, a new date—2015—was set for the achievement of universal primary education. In the Dakar Framework for Action (UNESCO, 2000) six EFA goals were approved: (1) provision of early childhood care and education; (2) free and compulsory primary education; (3) life skills; (4) literacy; (5) gender equality; and (6) quality. The framework is particularly significant for its inclusion of the goal of quality. Moreover, these goals seemed to herald a new era in the drive to define and assess quality through indicators. The framework included the process of improving all aspects of the quality of education, and ensuring that excellence of all recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy, and essential life skills. The report noted that quality is at the heart of education, and what takes place in classrooms and other learning environments is fundamentally important to the future well-being of children, young people, and adults. The report further concluded that a quality education is one that satisfies basic learning needs and enriches the lives of learners and their overall experience of living (UNESCO, 2000).

Subsequent efforts by UNESCO, OECD, and other international organizations resulted in lists of characteristics believed to represent quality education or suggested actions necessary to build effective education systems. The following list further indicates the somewhat tentative movement to begin to reach beyond access into the process of instruction and learning and to recognize school outcomes. The DfID's EFA goals for quality primary education (DfID, 2000) offer the following list of minimum essentials (emphasis added):

- Developing *committed* and *motivated* teachers
- Defining and implementing *appropriate* curricula
- Providing *appropriate* teaching and learning materials
- Using *appropriate* languages for learning
- Promoting community participation
- Managing physical assets *effectively*
- Strengthening site-based management
- Undertaking *meaningful* assessment
- Creating a *child-friendly* environment
- Harnessing technology

The apparent emphasis in the latter prescriptive definitions is on government policy. The devil, of course, is in the modifiers. Obtaining agreement on indicators of "committed", "appropriate", etc. may be difficult. Measuring them may be even more difficult. Emphasis on government and government policy may be appropriate but insufficient, particularly for implementation of new programs and

actions. Clearly much ambiguity about the concept of education quality has persisted. As shown above, one approach has been to state that quality is implicit in all of certain preferred characteristics about education. Such lists may indeed characterize good education but are not particularly helpful to those who make curriculum choices, or who plan and implement education or school reforms.

The EFA Monitoring Report 2005 (UNESCO, 2005) further examines progress toward the six EFA goals. In terms of attainment of these goals this report notes that countries that have the most difficulty in achieving goals 1 through 5 are also farthest from achieving goal 6 (quality). The report also links quality with success in achieving universal participation in education.

PROGRESS, PROBLEMS, AND THE TASK AHEAD

The 2008 EFA Global Monitoring Report (UNESCO, 2008) provides a comprehensive review of (1) the progress made toward the achievement of each goal; (2) the scope of the challenge remaining; and (3) key actions countries need to take to further implement the goals. The following is a summary of the general progress and the recommendations with respect to quality.

(1) Progress. Many of the EFA goals probably will not be achieved by the target year 2015. However, there has been significant educational expansion in some countries. Net enrollments have increased in several countries and this increase has been greater in recent years than in prior decades. The report notes that the average net enrollment ratios have continued to increase since Dakar. Sub-Saharan Africa raised its average net enrollment ratio from 54% to 70% between 1999 and 2006, for an annual increase six times greater than during the decade before Dakar. The increase in South and West Asia was also impressive, rising from 75% to 86%. Adult literacy rates have also increased. 59 of the 176 countries reviewed have achieved gender parity in both primary and secondary education.

(2) Challenges. The report points to persisting wide "achievement gaps" between students in rich and poor countries. Further inequalities exist between regions, communities, schools, and classrooms. While recognizing the importance of the significant quality gaps between countries, the report concludes: "it is within countries that the greatest disparities exist, with teachers unevenly distributed across regions" (p. 8).

(3) Recommendations. The report offers the following top quality recommendations as requisite actions leading to improved primary education:

- Strengthen policy commitments to quality education and create effective learning environments for all students, including adequate facilities, well-trained teachers, relevant curricula and clearly identified learning outcomes. A focus on teachers and learning should be at the heart of this commitment
- Ensure that all children attending primary school for at least four to five years acquire the basic literacy and numeracy skills that they need to develop their potential

- Develop the capacity to measure, monitor and assess education quality**,** in areas that affect learning conditions (infrastructure, textbooks, class sizes), processes (language, instructional time) and outcomes
- Revise existing policies and regulations to ensure that children have sufficient instructional time and that all schools minimize the gap between intended and actual instructional time. Participate in comparative regional and international learning assessments and translate lessons learned into national policy and develop national assessments that best reflect each county's particular needs and goals
- Participate in comparative regional and international learning assessments and translate lessons learned into national policy, and develop national assessments that best reflect each country's particular needs and goals (pp. 6–7)

Shifts in Educational Governance and Changes in Educational Choices

The notion of education as a human right persists in the international literature describing global goals. Considering the millions of children with no access to schooling, such confirmed attention is appropriate. However, in the closing decades of the 20th century and the early years of the 21st century, significant progress was made in extending the provision and benefits of basic education, and primary enrollments in many countries approached 100%. Lower secondary education rapidly expanded, and in several countries had become part of basic education. Moreover, economic globalization was making demands on educational systems to produce new and more advanced skills and knowledge. There were calls from UNESCO, OECD, the World Bank and other international organizations for more attention to education quality and to post-basic education.

There appears to be widespread support for the belief that the tools and learning provided by primary education are no longer sufficient for people entering new labor markets. It has also been noted that the curriculum in post-basic education is often seen by employers as too academic to prepare youngsters for the evolving world of work. Further, vocational education and training, often under criticism in the past, is now seen to need radical changes. Currently, effective school-to-work connections appear to be few, and opportunities for updating new skills are not available in many education systems.

Much recent research by the World Bank and OECD has focused on linkages between education, the labor market, and skills development. The World Development Report 2007 (World Bank, 2006) emphasizes how certain investments in education can reshape a person's future: by broadening opportunities through expanding access to, and improving the quality of, education; by developing capacities through recognizing people as "decision-making agents"; and by providing effective systems of second chances through targeting programs. Johanson and Adams (2004) analyze the labor market context and development in Africa, identifying the roles of public training, non-government training, training by formal sector enterprises, and skills development for informal sectors; they recommend strategies for mobilizing and allocating

resources for training. Riboud, Savchenko, and Tan (2007) focus on how skills affect labor market outcomes. They present data from South Asia and highlight the importance of upgrading skills, reducing the gender gap, and expanding secondary and tertiary education and vocational education and training, as well as in-service training.

Global trends in the role of the state may facilitate the implementation of education reforms in many countries. The trend away from the emphasis on command and control toward less intrusive forms in new models of government can be interpreted as part of pervasive globalization and its powerful economic and cultural drivers.

Table 2. Directions of changing roles of national government in education

Aspect	*Earlier roles*	*More recent roles*
Role of government	Finance, design, evaluate education development	Serve as catalyst and partner with local bodies in developing quality standards regulation
Purpose of policy planning	Ensure control/compliance Allocate public resources	Coordinate policy, manage and monitor regulations Actively coordinate public/private collaboration
Role of strategic planning	Focus on control	Mobilize/coordinate interest groups
Focus of management support and administration	Oversee details of administration Provide services	Set national vision Provide leadership in equalizing services Monitor national standards for R&D Facilitate good services

The implications of this trend for a number of dimensions are shown in Table 2. Regulatory functions of governments continue but additional enabling functions may appear. The latter include creating an enabling environment and support for expanding education, improving choice in education, ensuring all schools meet minimum conditions, and preparing teachers and principals in a manner consistent with the curriculum for students. Other enabling functions provided may be: alternative modes of service delivery, extending incentives for providers to serve the disadvantaged, encouraging a diversified network of service providers, coordinating the planning efforts of local government and civil bodies, promoting

capacity-building for lower-level government officials involved in implementation and enabling participation of a wide range of players in consensus building.

Shifts in Focus to Post-basic Education

Improvement of the quality of basic education remains a high priority in most countries. However, within the last few decades the outlines of a new priority for several countries have emerged, focused on post-basic education. In the new model nations seek further education development and competitiveness for participation in a globalized economy which has forecast a reduction in demand for routine manual skills and an increased trend in demand for complex communication and "expert thinking" skills and competencies. This more recent goal, at minimum, appears to require special skills in math, science, new technologies, and a global language. Also required are new public-private partnerships, including universities and industries; larger investments in quality education at all levels; expansion of preschool education; equality in post-basic education for girls; and strategies for poverty alleviation. The new model is expected to respond to changes in the composition of the labor force with a predicted demand for increases in creative or expert thinking and complex communication skills. Education quality in schools may be expected to include cognitive, metacognitive, and non-cognitive skills.

In the late 20th century and early 21st century, impetus has been given to post-basic education by those governments which were preparing for the knowledge society and global economy by developing long-term plans, funding transnational education, and financing radical expansion of postsecondary education. Examples of new ambitious national goals include China, which has set target dates for attaining a goal of 100 "world-class" universities; Korea, which has the "Brain Korea" project to strengthen selected universities and extend R&D in education (Kim, 2007); and Malaysia, with the "20/20 Project", which has set goals to improve science and English language programs by 2020 (Kee, 2004, 2008). In several countries (e.g., Turkey and Korea), ministries of education or authorized ad hoc bodies are designing long-term "road maps" towards world-class educational futures.

The globalization focus tends to translate into ways to make education more economically relevant. Yet an argument can be made that education has also become a social necessity. As Zgaga (2008) points out,

> Today, there is a consensus that people need applicable knowledge; we can also hear that schools should not teach anything that is not applicable, useful. If this conceals criticism of the long ago obsolete school methods or the hindered access to education and learning, such standpoints must be accepted. However, they become problematic the moment they are interpreted to say that there can be nothing in the school curriculum and nothing important for non-formal ways of learning which is not directly 'useable' and which does not make my most individual, private interest satisfied. (pp. 179–180)

Carnoy (2001) focuses on somewhat different new demands of educational resources. He argues that new demanding social functions may need to be assumed by schools. New functions appear partly because so many married women have come into the workplace, part-time and then full-time. With the loss of the social relevance of the workplace, and of work-based forms of social organization, a greater demand is placed on other forms of sociability. The family can no longer be assumed to reproduce labor and knowledge as it has in the past.

Alternative Forms of Quality Education

The discussion thus far has focused largely on the traditional organization of schooling common to most countries. With notable exceptions, the publications from UNESCO and other international bodies have tended to equate learning with education and education with formal schooling. National educational plans and reforms have done much the same. Extensive growth in the roles of the private sector and the civil society has extended educational opportunities and increased educational innovations. However, most of these efforts have utilized the existing model of schooling.

An educational reform which has attempted a radically different model of learning and has demonstrated considerable success in including the hard-to-reach children and youth is briefly described here. Perhaps the best known of such programs are *Escuela Nueva* initiated in Colombia, the non-formal Bangladesh Rural Advancement Committee (BRAC) program, and the Egyptian Community Schools Program. Many of these "alternative schools" operate within ministries of education or under the supervision of NGOs. A project monitoring the progress on alternative schools now claims to have over 250 cases in its data base (Farrell & Mundy, 2008).

Alternative schools usually follow the prescribed national curriculum but often have demonstrated successful non-traditional pedagogy. Such schools tend to have close relationships with the community and make extensive use of local or community resources. Farrell and his associates (Farrell, 2007a, 2007b; Farrell & Hartwell, 2008; Farrell & Mundy, 2008), who have been studying this expanding alternative schooling for a number of years, have observed several indicators of "quality education". Their findings indicate that in most of the cases which have been evaluated, the results are good in terms of enrollment, retention, completion, and movement to the next level of education, and in achieving academic success as measured by tests. On the whole, students in these schools perform at least as well as and often better on achievement tests than students in traditional schools. Box 1 identifies the most common characteristics of the alternative programs.

Box 1. The Emergent Model: Common Features of the Alternative School Programmes
Child-centered rather than teacher-driven pedagogy
Active rather than passive learning
Multi-graded classrooms with continuous progress learning
Combinations of fully-trained and partially-trained teachers with community involvement
Peer-tutoring
Self-guided learning materials
Teacher- and student-developed learning materials
Active student involvement in the governance and management of the school
Use of radio, correspondence lesson materials; sometimes television, computers
Ongoing, regular and intensive in-service training and peer-mentoring for teachers
Ongoing monitoring/evaluation/feedback systems
Free flows of children and adults between the school and the community
Community attention to the nutrition and health needs of pre-school age children
Locally adapted changes in the school day or school year
Focus of the school less on teaching; more on learning

Source: Adapted from Farrell and Hartwell (2008, p. 19)

The success of these alternative approaches to learning raises issues as to their future and the possible impact on mainstream schools. Can the success of non-formal schooling offer lessons in pedagogy and flexibility of program useful for traditional school systems? Are there roles for both to coexist? Even discounting some of the enthusiasm among researchers into non-formal schools who have become advocates, the achievements of these schools have been significant. They would appear to have earned a place in any global, national, or local strategy for attaining quality education.

Clearly the style of schooling described in Box 1 is significantly different from the types of formal schooling discussed or implied in much of the literature reviewed earlier. Although the structure of schooling tends to be similar across nations, there appear to be some conditions emerging which provide a context for experimentation. With changing patterns of educational governance, increased parental involvement, and aggressive private investment, one might expect significant local and national experimentation. Some observers claim that such opportunity thus far has largely been weakened when rigid traditions of testing and selection are present.

SEEKING MORE SYSTEMATIC ASSESSMENT AND PLANNING OF EDUCATION QUALITY

Assessments may be performed at any level: individual, school, or national system. Many teachers, with or without technical assistance, regularly evaluate their own work and adjust their teaching accordingly. Public education, accountable to the public, may be expected to be examined critically at the school or the system level. In some countries parent groups, at times supported by the government, are active participants in regional and national education assessments. National assessments and evaluations of education continue to develop and may serve a number of functions. Implicit or explicit in these functions are foci on one or more of the following: learning outcomes, institutional accountability, gatekeeping to a range of other programs and institutions, cross-national comparisons of certain goals, and insights to suggest modifications and improvements in instruction and learning.

Assessment technologies suggest the potential for quality control at the institutional and systems levels. Accountability as presently conceived seems increasingly mandated by central authorities. There are, however, difficulties in applying large-scale assessment results to instructional diagnosis. Serafini (2001), for example, takes a controversial position and argues from a constructivist viewpoint that top-down accountability is so fundamentally different from providing data for instructional diagnosis that educators should not expect any classroom effects. He goes on to advocate replacing large-scale assessment with "assessment as inquiry" (p. 387). The challenge to stakeholders may be to also ensure that the multiple persisting concerns of community, instruction, and learning are met.

Decentralization and localization of decision making have not simplified the task of planning, implementing, and assessing educational change. However, refinements in the technology of testing and assessment have raised expectations for more control over guiding improvements at systemic and institutional levels.

International Tests and Aspirations for World-Class Education

International student assessments attempt to acquire data which are valuable in revising curricula and educational policies. Low test scores have contributed to a range of changes in curriculum standards, in programs of teacher preparations, and in a broad range of education policies.

International assessments are a relatively recent but important development in assessing education quality. These are typically large-scale, multiple-country, sample-based assessments aimed at comparing the performance of a specific age group in a specific subject or group of subjects across a large number of countries. Examples are the Trends in International Mathematics and Science Study (TIMSS) and the Programme for international Student Assessment (PISA). Table 3 offers an example of recent PISA data.

Table 3. 2009 PISA data: Math and science scores for Argentina, China, Chile, Korea, and Finland

Country	*Math scores*	*Science scores*
Argentina	388	401
China:		
Shanghai–China	600	575
Hong Kong–China	555	549
Chinese Taipei	543	520
OECD Average	496	501
Chile	421	447
Korea	546	538
Finland	541	554

Source: OECD (2009)

The purpose of these tests is to provide internationally comparable evidence of achievement, so that countries can monitor learning outcomes within a common framework. Unfortunately, the results are often used by media, politicians, and educators merely in terms of "rank ordering" countries rather than as a basis for policy dialogue and a better understanding of the causes of observed differences in performance. In some countries the attainment of a "world-class" educational system, presumably one whose students score well on international tests, has become a vigorous national policy.

The growing importance of international assessments points to the potential for a wider consensus about the knowledge and skills all students need, as they enter adult life in a world that is globally interdependent. Critics might view such instruments as entrance examinations to the exclusive "world-class" educational club of countries or see them as a set of "supranational" instruments for standardization. Here, attention is focused on PISA because of its increased use in cross-national comparisons of quality and its growing role in setting national educational targets.

CONCLUSIONS

Innovations circle the world and the search for education quality takes place in many contexts and often with great passion. Literally hundreds of academic analyses and funding agency documents attempt to review "lessons learned" or "best practices". This is a reasonable activity, for nations have been borrowing from each other, often successfully, for centuries. As noted, a possible problem with such attempts is that educational innovations as well as broader education reforms have a sticky quality and, at minimum, need adaptation and careful monitoring in any attempt at transfer.

Improvements in education quality commonly appear among the goals and objectives of education systems and institutions in most countries. Many education

reforms today seek curriculum changes and readjustments that can reorient teaching and learning to the new demands described earlier. As demonstrated by several decades of attempts, defining and assessing education quality is difficult and its meaning and measurement remain contested. There is no universal agreement on its definition, its relevant variables, or on how higher quality is to be attained. The complexity of this task reflects the complexity of educational processes characterized by many variables simultaneously interacting. Although education quality has acquired high priority, the multiplicity of conceptualizations of quality also reflects the concerns and foci of multiple stakeholders. Given a working agreement on the meaning of quality, issues may continue over its measurement. The questions persist: who benefits from particular policies focused on quality? And what are the potential tradeoffs between a focus on quality, equitable distribution of education, and inclusion of various traditional expectations?

The current trend to give increased power to national and international tests has two key elements: incentives to encourage local schools and districts to change, and methods for determining who should be rewarded for compliance with centrally-defined standards. The new strategy transfers certain responsibility for reform from central to regional governments or, at times, from regional governments to districts and schools and teachers. However, given the growth of national and international educational testing and the correlative focus or increased bureaucratic control over testing technology and its applications, what may be transferred is not so much the authority for choosing responsibility as that for implementing the change.

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EDUCATION REFORM AND THE DISCOURSE OF QUALITY IN ARGENTINA

In this chapter we analyze the reform of basic education in Argentina in relation to discourses of quality. We focus mainly on the policies on primary and secondary school reform implemented during the last two decades.

We argue that the concept of educational quality that has informed the reform can be seen as a combination of elements of the prevailing global discourse—framed mainly by multilateral organizations like the World Bank and regional bodies like the Economic Commission for Latin America and the Caribbean (ECLAC)—and of local discourses of quality. The period we analyze (1990 to 2009) saw both shifts and continuity. Even though the current dominant discourse rejects the neo-liberal model of development, the concern for educational quality and its measurement has not disappeared.

Argentina is a federal country, but the provision of education and other services has traditionally been organized in a very centralized way. The relatively high levels of literacy, educational attainment, and social democratization that the country had achieved by the mid-twentieth century were significantly reversed by the joint effects of the last military dictatorship (1976–1983) and the economic crisis of the 1980s. During the last two decades, the educational system has been reconfigured, and has been adapted in response to new challenges posed by local and global forces, raising important issues in the public arena.

We consider the concept of educational quality to be an empty or floating signifier: a concept that may adopt different meanings, according to different political views. The vagueness of the concept has been pointed out by various authors and organizations in the fields of comparative education and education planning (Casassus, 1999; Myers, 2006; Pedró & Puig, 1998; Santos Guerra, 2003). In order to understand both the meaning of the concept of educational quality in Argentina and how it has been translated into practice, we have analyzed the reform policies as well as some key texts from the national government, local academics, and international organizations. We focus on three events that led to change: (1) the emergence of the discussion about quality at the end of the 1980s, (2) the enactment and implementation of the Federal Law of Education in 1993, and (3) the enactment of the Law of National Education in 2006.

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 23–40.

THE EMERGENCE OF THE DISCUSSION

At the end of the 1980s, during which Latin Americans had experienced economic stagnation and the rebirth of liberal democracy, a new rhetoric of education reform developed in the region, based on three key or dominant concepts: quality, equity, and efficiency (Braslavsky, 1999; see also Casassus, 1999). Braslavsky (1999) argues that each of these concepts allowed for different interpretations, but together they established a common framework for reform in most of the countries in the region. At that time, the concern to expand educational systems began to be replaced, at least in part, by concerns about school performance, in terms of both student learning and equality of opportunities.

According to Casassus (1999), new weight was given to the concept of quality because of the strategic centrality of education for economic development and social integration that was established globally at that time for both central and peripheral countries (see also Carnoy & Moura Castro, 1996). This shift began to be clear in the documents produced at the regional meetings of national ministers of education in 1989 and 1991 (Casassus, 1999; Gajardo, 1999). At the fourth conference of PROMEDLAC (Comité Regional Intergubernamental del Proyecto Principal de Educación en América Latina y el Caribe) in Quito in 1991, participants declared that Latin American education systems had been based on strategies that were no longer able to "harmonize quantity with quality".

The document produced there (UNESCO/OREALC, 1991) linked the improvement of quality to processes that would professionalize teachers and transform curricula; it also stressed the need for a new model of educational development in the region, one built around decentralization policies and the establishment of systems to assess and evaluate students. For countries in Latin America, the global Initiative of Education for All, launched in Jomtien in 1990, was also influential in emphasizing the issue of quality and its measurement. One goal established in Jomtien was an emphasis on learning outcomes as fundamental indicators of quality. In this regard, Pedró and Puig (1998) highlight the shift from concerns about equality of opportunities during the 1960s to quality, from the 1980s on. They point out the predominant political interpretation that identifies quality with academic achievement; this leads to an emphasis on evaluating educational products or results rather than processes.

A key text during this period, because of its impact on both the regional educational discourse and national policies, was *Education and knowledge: Basic pillars of changing production patterns with social equity*. Produced by the Economic Commission for Latin America and the Caribbean (ECLAC, 1992), its objective was to update the regional development model. This new development model was supposed to strengthen democratization and help integrate Latin American countries into the world economy. The document outlined an educational reform strategy that would help to address "both the internal challenge, which is that of building citizenship, and the external challenge, which is that of competitiveness" (Summary, para. 2). As its title indicates, the document primarily emphasized equity, rather than quality. But it did recognize the need to expand

educational systems; it pointed to shortcomings in "the quality of their results, their degree of adaptation to the requirements of the economic and social environment, and the degree of equity in the access of the different strata of society to them" (Summary, para. 3).

This new emphasis on equity seemed to respond to high (and increasing) social inequalities as well as to the awareness that educational policy should also provide an answer to the growing social and cultural diversity in the region (Feijoó, 2002). Casassus (1999) notes that the concern for quality is necessarily linked to the concern for equity, even when they are independent concepts. Given the extension of formal instruction to the great masses of students, he argues, the goal is to achieve a high quality education for all.

It should be noted that the crisis in educational quality was seen as critical not only by multilateral organizations or from functionalist viewpoints. For example, Arnove, Torres, Franz, and Morse (1997), arguing from a neo-Marxist perspective, point out that the quality of education in the region was severely affected by neoliberal policies implemented during the 1980s and early 1990s: "Decreased expenditures, outdated pedagogies and curricula, and restricted access all contributed to the general decline in the quality of education. Low teacher salaries also affected educational quality" (p. 147).

In Argentina, the re-establishment of democratic political institutions in 1983 had allowed for a more open and more broadly-based discussion of the structure and content of education. With the Pedagogical Congress (Congreso Pedagógico, 1986–88), which involved teachers, parents, community members, students, and representatives of different organizations in a debate about the situation of the educational system, "an effort began to build consensus and to seek out or create new policies and action strategies" (Braslavsky, 1998, p. 299). At the same time, other issues related to quality began to appear in the academic discourse: the mismanagement of the school system, its increasing segmentation, and the need for policies to promote equality of opportunities and school democratization (Filmus, 1995).

Despite the variety of diagnoses and conceptions of quality, a prevailing view existed within the Argentine academic community that educational quality had been declining since the 1960s. While public schools had been suffering from rising enrolments combined with falling investments (Beccaria & Riquelme, 1985), the private sector had been growing by incorporating middle- and upper-class families. This was probably because private schools could better respond to the demands of families (Narodowski, 2002), and were increasingly seen as offering a higher quality of education than the public schools. The decline of public education had been accentuated by both the economic crisis of the 1980s and the policies of the last military government (1976–1983) (Braslavsky & Tiramonti, 1990; Filmus, 1995). Those policies included closing education offices that had planning and research functions (see Paviglianiti, 1988; Suasnábar & Palamidessi, 2007), and neglecting pedagogy and curriculum. For example, Tiramonti (1995) points out that in 1983, 400,000 primary students in the Province of Buenos Aires were offered only 2 or 3 hours a day of schooling, including the provision of a meal.

Moreover, the national and provincial ministries of education appeared to have low capacities for governing the system and affecting the work of schools (Braslavsky, 1998; Paviglianiti, 1988). Meanwhile, the fragmentation of the system led to great inequalities, as schools varied in the quality and types of services they offered to different groups of students (Braslavsky & Krawczyk, 1988). The combination of increases in enrollments and lack of investment in the educational system resulted in overcrowded schools and classrooms, and the sense of crisis. For instance, the secondary *net* enrollment rate rose from 33.4% in 1980 to 53.5% in 1991. But regional differences were huge: in 1991, net enrollment for the city of Buenos Aires was around 72%, compared to about 38% for the province of Chaco, in the less developed northeast (Tiramonti, 1996).

Four texts offer examples of the way educational quality was conceptualized at the local level in the period around 1990. The first is a document produced in the context of the Pedagogical Congress (Ministry of Education and Justice, 1988). One of the six commissions formed to propose reforms based on the work of the congress focused on the issue of quality. The proposal that the commission developed focused mainly on basic education and had four headings: (1) contents and methods; (2) health education; (3) education and work; and (4) teacher training. Although its strongest calls for reform focused on modernizing teacher training and curriculum, this document reflected a broad conception of quality.

The second text was written by two researchers, Cecilia Braslavsky and Guillermina Tiramonti (1990), based at the Argentine branch of the Facultad Latinoamericana de Ciencias Sociales (FLACSO), then the country's most important educational research center. Focusing on the secondary level, they suggested that to ensure a quality education, schools would have to provide students with the knowledge and skills they needed to develop personally and to help build a democratic, prosperous, and just society. These authors described how a strong demand for quality arose during the 1980s in Argentine education. At that time many studies showed that Argentine schools were performing poorly on the dimensions of curriculum and student achievement.

The demand for quality implied the need to implement educational innovations, but that was not possible because of a particular management model that informed the whole educational system, including the direction of schools. This model—the result of many years of political instability, authoritarian ideology, economic crisis, and a non-collaborative organizational culture—was characterized by the rejection of change and innovation, and by a focus on bureaucratic tasks. Implementing educational innovations would require a new management model, one that focused on curriculum and instruction as the central elements of schools. The authors noted that it is always difficult to build a new organizational culture, and that at the end of the 1980s the national government was only starting to process the demands for educational quality.

A third text was written by Inés Aguerrondo (1996), an education planner who later became one of the main architects of the reform during the 1990s. She also stressed organizational and management aspects, but emphasized the need for a commitment to effectiveness and efficiency in the school system. She argued that

traditional management models in Latin America were exhausted as the result of three trends: the expanding educational systems, increasing diversity in the student population, and material restrictions caused by economic adjustments. To her, "the school institution" was "a *service unit*", the point "where the fate of educational quality and equity is decided" (p. 16); she said the chances of improving quality relied on advancing toward a decentralized model in which the central level had greater capacities, and schools had significant autonomy. In another text (Aguerrondo, 1993) she argued that educational quality should be evaluated globally, not just as the measurement of results, and should take into account the variations in the meaning of quality based on differences in cultural contexts.

The fourth text espouses a view in which school autonomy and competition are the main elements needed to improve quality. FIEL (Fundación de Investigaciones Económicas Latinoamericana) and CEA (Consejo Empresario Argentino) proposed a double process of decentralizing authority and responsibilities to municipalities and to schools and introducing market mechanisms to encourage competition among schools. It also proposed charging tuition at the secondary level (in a country where even higher education is free of charge), and promoted *cooperadoras* or school councils to raise funds for schools. Private schools would continue to receive state grants (traditional in Argentina), since they were considered to provide a greater supply and diversity of education (FIEL & CEA, 1993).

On the other hand, as we have shown, the regional and global discourses expressed by multilateral organizations and meetings had begun to emphasize a focused, narrow view of educational quality, mainly linked to learning outcomes. A World Bank report on the Argentine education system produced in the late 1980s (Kugler, 1991) reflected this view, stressing the need for standards and systems for measuring student achievement that could result in interventions to address problems and shortcomings in underachieving districts and schools.

QUALITY AND EDUCATION REFORM IN ARGENTINA DURING THE 1990S

The reform of the Argentine education system during the 1990s was part of a regional process of educational change that was influenced by both international agencies and local actors, linked to the recovery of democratic political institutions at national levels, global economic restructuring, and the idea that education was central to development and social integration (Concha Albornoz, 2005; Gajardo, 1999). At the same time, educational change in Argentina was influenced by the processes of state restructuring and neoliberal reform: the economy was opened to international trade, state-owned companies were privatized, and economic activities were deregulated. The first step in restructuring the education system was decentralizing secondary schools and teacher training institutes from the national to the provincial level; the next step was enacting the Federal Law of Education (1993) and the Law of Higher Education (1995).

At the basic education level, several changes were made. A new academic structure was created that extended compulsory education from 7 to 10 years.

Provincial systems of educational administration were modernized. Curricula were updated and a new mechanism was established to design them. Compensatory programs were implemented for the most disadvantaged social groups, and systems were developed to assess, evaluate, and inform students. Teachers were retrained, to upgrade their subject knowledge and teaching methods, and a new model of school management was adopted. The World Bank and the Inter-American Development Bank (IDB) participated in the design and financing of educational reform, supporting some of the policies implemented. The World Bank assistance focused on the reform of higher education and of administrative aspects of provincial systems, while the IDB mainly concentrated on secondary schooling.

The declared objectives of the reform were enhancing quality and equity. Changes were also justified to adapt the educational system to technological changes and to the requirements of the global economy (e.g., Ministry of Culture and Education [MCE] 1996b, 1997). In the 1993 Federal Law of Education, the main legal instrument of the reform, the concept of educational quality was not defined clearly. References to it were very general, but it did state that quality would be guaranteed through evaluation (articles 48, 49, and 53). The evaluation of quality should verify that curricular contents respond to "social needs" and to the "educational requirements of the community" (Article 49), but it did not explain how those needs and requirements would be established.

With regard to the goal of improving equity, the 1993 law stressed that the federal government would play a compensatory role. This was translated into the Social Plan, designed to provide federal funds for improved facilities, computers, and textbooks directly to the poorest schools in the country. The Social Plan reached more than 17,000 schools and around 3.6 million students during the period 1993 to 1998 (Morduchowicz, 1999). The new emphasis on compensatory programs can be seen as a response to the increasing poverty and marginalization that developed despite the high rates of economic growth. The aim of one program, for example, was "to provide poorer children with the same (pedagogical) resources as the most privileged ones" (MCE, 1997, p. 44). The plan can also be seen as a public policy that identifies particular social groups as deficient and needy, while departing from the idea of universal social rights (Duschatzky & Redondo, 2000).

The improvement of quality, on the other hand, was to be achieved through improved governance and changes in teaching approaches. The official discourse linked educational quality to the implementation of a curriculum based on developing competences, moving towards school autonomy, and developing both school institutional projects and more efficient administrative systems at the provincial level (Decibe, 1998). The Ministry of Culture and Education (MEC, 1996a) argued that to successfully implement curricular and instructional changes, the country would need a new organizational and management model: more decentralized, participatory, and flexible. This combination of pedagogical and administrative innovations was promoted through national programs like Nueva Escuela (New School), which worked with provincial governments and schools (Tiramonti, 1996). A primary instrument for this new model was the development

of the *proyecto educativo institucional* (PEI), or school institutional project. As Astiz (2006) explains, "in the course of" using "collaborative endeavors" to design the PEI, "schools were supposed … to develop innovative management and pedagogy models to produce quality education" (p. 206).

The curricular reform process, which had its precedents in various provincial experiences during the 1980s, was one of the main elements in restructuring the educational system. The new curricula were designed at three levels. At the national level, the Federal Council of Education established the general objectives and guidelines. At the provincial level—including the city of Buenos Aires—the objectives and guidelines were developed further, taking into account the local situation in each province. The final design of the curriculum at the school level required that each school make decisions on content and instruction strategies. The Federal Council had stated that the school was the fundamental unit for the specification of the educational project, so the provinces should leave to the schools the responsibility for completing the development of a curriculum that would respond to their local situations and realities (MCE, 1996a). In the early 1990s, the government asked schools to provide inputs to design a set of common contents, but the final product was decided in a very centralized way (Rivas, 2004). On the other hand, the participation of experts was important, and resulted in a modernization of contents and instructional methods (Dussel, 2001; Tedesco & Tenti Fanfani, 2001). The final product was a curriculum based on the development of "competencies"; it was supposed to allow students to gain understanding and to perform in the personal, social, and work dimensions of life.

Teacher professionalization was also seen as a central element to improve educational quality (Serra, 2004). An MCE document described this idea:

> Pursuing schools with higher teaching quality is closely connected with a change in teachers' role towards higher levels of professionalization. A professional educator is someone who manages the knowledge areas necessary for teaching and learning, who at the same time, is able to make autonomous decisions with independence, freedom and responsibility. (MCE, 1996c, p. 3, quoted in Pini, Musanti, Gorostiaga, Feldfeber, & Oliveira, p. 579)

In spite of this stress on teaching improvements, the quality of the courses delivered under the umbrella of the Federal Network of Teacher Training—created and managed by the national ministry with the participation of the provincial ministries of education—could not be monitored effectively. Two important results were that isolated courses were offered, at very different quality levels, and that teacher training tended to become merely a formality; teachers took courses mainly to earn raises and promotion (Pini et al., 2010; Serra, 2004).

Another significant policy relevant to quality was the establishment of a National System for the Evaluation of Educational Quality, which aimed to measure learning outcomes. Since 1989, the national ministry had been working on planning this system, with important support from international organizations (Nores, 2002). In 1993, the government began to conduct annual national

assessments of learning outcomes through standardized tests on Spanish, math, sciences, and social studies administered to samples of students at primary and secondary levels. Although the test content and items were decided through a consultation process with provincial governments, the evaluation system worked as a tool for the federal government to reassume centralized control over the education system (Benveniste, 2002). Through the publication of results, the national government seemed to seek legitimization for the reform, and to hold provinces and schools accountable for student achievement:

> Assessment data would not only inform policy change but would actually serve as a conduit to justify and mobilize public opinion around the incipient Argentine educational transformation … The national government sought to supply public opinion with immediate, conclusive, and objective evidence that the education sector was in crisis and that this crisis demanded the wide-sweeping reforms inscribed in the Federal Education Law. (Benveniste, 2002, p. 106)

It can also be argued that the selective use of the information provided by the tests implied a focus on teaching as the main variable to explain outcomes (Gvirtz, Larripa & Oelsner, 2006); this accounts in part for the opposition of teachers' unions to the assessment system (Nores, 2002). Unions feared that the results would be used in the future to determine teachers' compensation and promotion, but their critiques also addressed technical issues and the fact that the evaluation of the educational system focused only on students achieving a minimum amount of course contents (Rodríguez &Vázquez, 2000).

The official discourse on educational quality did incorporate references to democratizing schools and developing citizens, but it placed more emphasis on responding to the requirements for the economic and technological transformations, and on measuring educational results. This conception of quality was reinforced by the prevailing global and regional discourses about educational reform. For example, ECLAC (1992) advocated institutional redesign, and PREAL (1998) argued that the region's educational systems needed repair so they could contribute to their countries' economic competitiveness. This conception was also supported, through both argumentation and technical and financial support, by the World Bank and the IDB.

A World Bank (1995) report that helped to set the strategy for assisting with the reform stated that "Argentina's population… is ill-prepared in comparison with countries with a similar income level and with which it competes in world markets … Despite relatively high coverage rates, the quality and productivity of the educational system is poor" (p. 3). Moreover, it argued that "the low quality of student learning" is "related to the poor quality of educational inputs, including: shortages of educational materials; inadequate teacher training; lack of relevance of curriculum content; and poor school management and lack of school-based initiatives" (p. 9). In a positive appraisal of national reform policies, the document pointed out that the Federal Law of Education "emphasizes and gives special priority to the provision of high quality education and its measurement" (p. 10).

With a similar tone, a report of the IDB (1994) declared that the law "provides for improving the quality of education through curriculum updating, teacher training, and the creation of a National Quality Assessment System" (p. 7).

On the other hand, the prevailing view of educational quality encountered significant resistance among local academics. They characterized the government's discourse as promoting a technocratic view that reduced the meaning of educational quality to measuring the system's productivity and responding to market requirements, while ignoring demands for democratization, in the context of restructuring policies that could increase unemployment and undermine universal social rights (Puiggrós, 1997; Tiramonti, 1997). For example, they saw the competencies-based curriculum as part of a neo-liberal discourse that encouraged a social Darwinist model (Frigerio, 1995a). Furthermore, they pointed out that an educational policy that aims to improve quality should be linked to a social policy that attempts to provide a better quality of life for all the population (Frigerio, 1995b), and said that the quality of education was "measured only in terms of specialized learning achievement", referring to "societal and job market-specific, content-related qualification requirements" (Munín, 1998, p. 231).

Other critiques of the national policy and its conception of quality came from neoliberal think tanks and foundations sponsored by business groups, which became very active in the discussion of education policy during this decade, proposing policies similar to those promoted by FIEL and CEA (1993), discussed above. In addition, FIEL/CEP (2000) argued that the reform of secondary schools had reduced the scope and duration of technical education, which had been neglected by most governments in the past half-century. These analysts contended that compulsory education could have been extended without changing the academic structure, and that a technical education modality starting at the 6th grade should have been organized, making schooling more attractive and useful for students of low socio-economic status.

THE IMPLEMENTATION OF THE REFORM AND ITS EFFECTS ON QUALITY

The design and implementation of the reform revealed significant obstacles to enhancing both quality and equity, probably due to a combination of political, financial, and technical factors (see Gorostiaga, Acedo, & Xifra, 2003). Tiramonti (1996) suggests that the national policy represented a dual political proposal that responded to the increasingly dual structure of society. It consisted of compensatory programs like the Social Plan for the poorest sectors, and pedagogical changes for the middle classes, which needed and demanded better education in order to compete in the employment market.

Despite an initial push towards more autonomous schools and the development of institutional projects, the national ministry gradually became more central in curricular and pedagogical decisions. In addition, the high levels of inequality, reinforced by the decentralization of educational funding, prevented schools in poor environments from developing the capacities they needed to become autonomous.

Given the decentralization of the Argentine educational system established in 1992, the implementation of the reform depended to a great extent on the provincial governments. The provinces, which had various political orientations and huge differences in their technical and financial resources, adopted a range of positions with regard to the federal law and the national policies (Senén González, 2000).

The Province of Buenos Aires, home to more than 35% of all the nation's students in basic education, was the province that advanced most quickly in the massive implementation of the new structure and the extension to ten years of compulsory schooling. This implementation, however, took place through a particular appropriation of the reform—one that emphasized coverage rather than quality—and under a political leadership that was in competition with the national government. The political logic was to include and retain low-SES students in order to focus on social policy, but without addressing the segmentation of the educational system. Provincial policy-makers recognized that this strategy would unavoidably lower quality (see Acedo, Gorostiaga, & Senén-González, 2007).

Despite a significant increase in educational expenditures, salient problems remained in the infrastructure and in teacher training. In many schools, quality suffered not only because teachers placed lower demands on the students, and because primary school methods of teaching and evaluation were adopted at the lower secondary level; another challenge was incorporating students who were overage, had a history of failing in school, and belonged to social groups that had never before had access to secondary education. A discourse of "diversity" was articulated in official documents and among educational authorities, including supervisors, addressing the need to adapt teaching styles to the situation of low-income students; this often resulted in teachers communicating less of the course contents (Acedo et al., 2007). For the whole nation, the main positive effect of the 1990s reform appeared to be the increase in enrollments, particularly at the lower secondary level (Rivas, 2003; Tedesco & Tenti Fanfani, 2001). Most of the measures that could help improve quality—curriculum updates, administrative modernization, improvements in infrastructure and equipment—were neutralized by an ineffective system of teacher training and the lack of adequate planning to extend compulsory schooling and adopt the new structure of primary and secondary education. Furthermore, many of the reform policies and programs were cut, beginning in the late 1990s, as the result of the economic recession and changes in the leadership of the national government.

The tensions between quality and equity were reinforced by global social and cultural processes that had been producing a new configuration of relationships between individuals and institutions; these developed rapidly in Argentina during the 1980s and 1990s, with specific features based on local traditions and social structures. This new configuration was shaped by various phenomena like the spread of new information and communication technologies, the growing influence of mass media in everyday life, the transformation of labor markets, and the challenges to the state power by both supranational bodies and local forces. As a result, the construction of people's social identities is no longer determined by

traditional institutions like the state, the school, and the family. In this scenario, schools face huge challenges as the value of school knowledge is questioned, and teachers are no longer seen as authoritative figures (Dubet, 2004). In Argentina, these challenges have become even greater in urban settings where both teachers and students suffer poverty and marginalization (Feijoo, 2002).

RECENT DEVELOPMENTS IN EDUCATIONAL POLICY AND THE ISSUE OF QUALITY

The economic crisis that Argentina suffered in 2001–2002 led to unprecedented increases in the rates of unemployment and poverty, and signaled the failure of the economic model that had been set up in the 1990s. The critiques of the Federal Law and the education reform—seen as part of the neo-liberal orientation of the previous decade—gained momentum as it became evident that its implementation had not improved quality in any of the conceptions adopted by various actors; meanwhile fragmentation and inequalities had increased, both within and between the provincial school systems.

During the administrations of Néstor Kirchner (2003–2007) and Cristina Fernández (2007–2011), Argentina has seen a reversal of some of the policies of the 1990s in a context of significant economic growth, particularly between 2004 and 2008. Both administrations adopted a discourse that emphasizes state intervention and social rights, but implemented policies that reinforce, or at least, maintain, an economic "productivist model" and social inequalities (Svampa, 2008). Furthermore, Argentina continues to be an example of "delegative and low-density democracies" (see O'Donnell, 1993).

With regard to education, starting in 2003 the national government aimed at establishing a more centralized regulation of the system, while legitimizing policies through consultation processes. The presence of multilateral organizations has been much less salient, but they have remained involved in the national educational policy through their funding of a few programs and Argentina's participation in some international student achievement tests.

Among other measures, the government raised teachers' salaries, created a national institute for teacher training, and passed new laws promoting technical education and increasing funding for achieving specific targets like universal initial and secondary schooling. Public investment in education and science grew from 4% to 5.4% of GDP in the period 2003 to 2007 (Delich, Iaies, Savransky, & Gallian, 2009), but in some provinces investment per student is still at a low level compared to international standards (CIPPEC, 2008).

At the same time, the national government has continued to promote the development of projects at the school level and to establish partnerships with civil society organizations. One example is the proposal to provide socio-educational support for secondary schools that the Ministry of Education (MoE, 2011) is currently implementing. Institutional autonomy and competition for resources are also encouraged by some of the policies that have aimed to improve the quality of teacher training institutions (Misuraca, 2009). On the other hand, since 2003, more

stress has been placed on "educational inclusion" for particular groups (dropouts, overage students, etc.); here, a major strategy is the "joint management" of programs by the state and civil society organizations (Ministry of Education, Science, and Technology [MoECT], n.d.).

During the past few years, the transition from school to work has become an important issue; in particular, the six-year secondary-level technical education program has been restored and upgraded, reversing the policies of the previous decade. In addition, the Ministry of Labor has developed a system of permanent training involving private companies and unions, while the Ministry of Social Development and some non-governmental organizations are implementing partnerships with secondary schools and other educational institutions to facilitate the entrance of young people into the labor market (CIPPEC, 2008).

The most significant initiative was the enactment of the Law of National Education, in December 2006, which replaced the Federal Law of 1993. The official document that was used to propose the public discussion of the new law stated that "only an education of excellent quality for all the population will allow [us to] reach the objectives of social justice, economic growth and democratic citizenship, which guide the strategy of sustainable development … Argentineans are recovering the conviction that the State must guarantee that these values reach the whole society without exclusions" (MECT, 2006, pp. 11–12). In general, the law stresses that education must contribute to building a more just society, and to overcoming inequalities and different forms of discrimination (see Pini & Gorostiaga, 2008). Among other provisions, the law extends compulsory education to the entire secondary level, creates the National Institute of Teacher Training, and establishes a full-time schedule (*jornada completa*) for primary schools.

As was true of the Federal Law of 1993, in the National Law of Education the concept of quality is not clearly defined, although it is mentioned many times. The first objective established for the national education policy is to "assure an education of quality with equality of opportunities and possibilities, without regional imbalances or social inequities" (Article 11, our translation). The new law devotes a whole section to the issue of quality (Title IV), in which the improvement of quality is linked to the development of information and evaluation systems. In addition, it creates a National Council of Educational Quality—with representatives from government agencies, the academic world, business organizations, and unions. Its functions are to provide advice and propose criteria and modalities for evaluating the national education system, and to ensure that the information produced through the evaluation processes is diffused and utilized. However, this council has not been implemented so far. The law also defines teacher education as a key factor for improving the quality of education (Art. 73).

Even though major organizations of teachers have supported the National Law of Education, some groups, such as ATEN, the Asociación de Trabajadores de la Educación de Neuquén (one of the Patagonian provinces), see a basic continuity between the policies of the 1990s and the new law. They argue that the emphasis on the evaluation of quality still has the objective of controlling teachers (ATEN, n.d.).

Along with some significant changes introduced during the past few years, the education policies show continuities with regard to important issues like the national assessment system, compensatory programs to assist students from the most disadvantaged areas, and the promotion of institutional autonomy and of partnerships between the educational system and civil society organizations.

In recent years, though the official discourse stresses democratization, and legal provisions have been established to increase enrollments in primary and secondary education, the rates of repetition and dropout remain high, and enrollment at different levels has not risen significantly (DINIECE, 2008).

On the other hand, students' results on national evaluations seem to show that learning has not improved. In the 2007 examination, for example, between 44.7% and 65% of secondary students (depending on the grade) got low or unsatisfactory grades on the math section. Meanwhile, private schools continue to significantly outperform public ones (DINIECE, 2009). For almost twenty years, the national system of student assessment has played a mainly symbolic role (see Benveniste, 2002) since changes in test design make it difficult to compare student results from different years, and no policies have been created for communicating results to the general public, or promoting their use to improve school quality (CIPPEC, 2008; Delich et al., 2009).

Not surprisingly, Argentina's performance on international tests such as PISA and SERCE also reveals a low level of student attainment. In 2000–2001 and 2006 Argentine students participated in the PISA (Programme for International Student Assessment), a program developed by the OECD and administered to samples of 15-year-old students (DINIECE, n.d.). On the 2006 evaluation, which involved 57 countries, Argentina occupied the 51st rank in sciences, 52nd in math, and 53rd in reading comprehension, and it was the country with the greatest internal range of scores. In addition, out of the 36 countries that participated in both evaluations (2000 and 2006), Argentina had the largest drop in its results on the reading comprehension test between the two evaluations.

In the SERCE (Segundo Estudio Regional Comparativo y Explicativo), which tests samples of third and sixth grade students in 16 countries of Latin America and the Caribbean (UNESCO/OREALC-LLECE, 2008), Argentina ranked 5th or 6th in the various areas (language, maths, and sciences); this represents a significant drop from the 2nd place it obtained for math and language in the 1996 PERCE (Primer Estudio Regional Comparativo y Explicativo). The country's low performance on PISA and SERCE, however, has not prompted any important debate about the quality of education, nor has it had any apparent impact on the policies of the national ministry of education.

Despite the presence of some positive measures (e.g., growth of public investment, establishment of compulsory secondary education, upgrading of teacher education), it can be argued that the country has still not developed a coherent, well-planned strategy for improving quality (even defined in a narrow way) and equity (considering differences between public and private schools or between different types of public schools). In addition, the consultation processes for implementing some of the national government's major initiatives (e. g., the

creation of the National Institute of Teacher Formation, the design of the Law of National Education) appear to be mechanisms that did not allow the various actors to participate significantly in the design of educational policies.

CONCLUSION

In this chapter, we have argued that different conceptions of quality have interacted in the planning and implementation of educational reform in Argentina since the end of the 1980s. Curricular and organizational changes introduced during the 1990s did not have the expected results of improving student learning, while reforms in governance seemed to improve efficiency but reinforced the inequalities among provinces. In addition, provincial governments are currently administering educational systems and carrying out national policies, but most of them do not have the capacity to design and implement their own policies for improving quality and equity.

The national policy has been influenced by different views of educational quality, including the rather instrumental view of international organizations as well as broader conceptions espoused by local academics and policy makers. As a result, the national discourse and policies have tended to express an unresolved tension between competing notions of quality. Moreover, the implementation of reform policies has been marked by difficulties in improving both quality and equity.

Today, demands to improve educational equity and quality remain high. In a context of social inequality that is likely to persist, the disparities are growing between the provinces and schools within the country in relation to educational access, promotion, and attainment. Private education continues to grow; around 24% of primary students and 25% of secondary students attend private schools, according to DINIECE (2008). Meanwhile public schools—with a few exceptions—tend to be seen increasingly as the schools of the poor sectors of society.

Critical issues remain for Argentina's education system, among them implementing a national system of teacher training and increasing public investment in provinces, like Buenos Aires, that suffer from underinvestment (see CIPPEC, 2008). In addition, democratic and research-informed decision-making is crucial to the process of improving quality, a process that should begin with a broad-based and ongoing national dialogue about the aims of education and the strategies for achieving those aims.

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THE QUEST FOR EDUCATIONAL QUALITY IN EGYPT

Active-Learning Pedagogies as a Reform Initiative

In this chapter, we examine active-learning (or what some have termed "progressive" or "student-centered") pedagogies, which constitute a model of teaching that highlights "minimal teacher lecturing or direct transmission of factual knowledge, multiple small group activities that engage students in discovery learning or problem solving, and frequent student questions and discussion" (Leu & Price-Rom, 2006, p. 19).[1] We argue that active-learning pedagogies, which can be contrasted with approaches emphasizing teacher lecturing or direct transmission of factual knowledge (Cuban, 1984, p. 3; Spring, 1980, p. 6), constituted a key aspect of educational reform as Egypt shifted its attention from a focus on quantity to a focus on quality. We trace the reform process undertaken by Egyptian education sector personnel as well as staff of international (multilateral, bilateral, nongovernmental) organizations, drawing upon our review of published research as well as government and international organization documents. In addition, we report the findings from our analysis of qualitative and quantitative data we collected from various stakeholders in Egypt. These data illuminate challenges, opportunities, and outcomes of efforts to implement active-learning pedagogies in government primary, preparatory, and secondary schools in Egypt.

EGYPT'S CULTURAL, POLITICAL, AND ECONOMIC CONTEXT

As of 2009, Egypt's population was estimated to be 83 million (World Bank, 2011); most Egyptians are Arabs with small minorities of Bedouins and Nubians. Muslims constitute 90% of the population, with some cultural/political differences among Muslim subgroups (Ibrahim, 1987; Ramadan, 1986; Voll, 1994), and Coptic Christians comprise approximately 9% of the population. There are also important cultural differences along the rural/urban and social class dimensions.

Although Egypt's long history dates back to before the pharoahs, its modern history is said to start in 1805, when Mohammed Ali assumed political leadership, ending Napoleon's French occupation and re-establishing Ottoman control (Williamson, 1987, pp. 61–62). Ali's heirs comprised Egypt's royal family, even during the periods of British Occupation (1882–1922) and "semi-independence" (1922–52), but their reign and British rule were ended by the "free officers'" revolution in 1952. Egypt is a republic organized nationally as a bicameral system

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 41–67.

(People's Assembly and *Shura* Council); increasing authority and responsibility in certain areas, including education, are given to governorates (*muhafazat*) and, to a lesser extent, local/city authorities (*markaz*) as part of decentralization initiatives. Up until the 25 January Revolution in 2011, members of the national legislative bodies and, importantly, the presidency were dominated by the National Democratic Party. Hosni Mubarak (1981–2011) was Egypt's third president, having succeeded Gamal Abdel Nasser (1952–1970) and Anwar Al-Sadat (1970–1981).

Ali promoted agricultural and industrial development (Cochran, 1986, p. 4) and sought "economic independence" from the Ottoman Empire (Amin, 1995, p. 108), but relied "increasingly on foreign loans" which led to "a position of dependency on Europe" (Williamson, 1987, pp. 64–66). Eventually, this "deservedly-famous Egyptian debt" led Britain to occupy Egypt in 1884 (Amin, 1995, p. 17).

With the 1952 revolution, Egypt nationalized foreign assets and implemented central planning of its "Arab socialist" economy, also establishing stronger economic relations with the Soviet Union than with the United States (Williamson, 1987, p. 116). However, Egypt's economy suffered dramatically as a consequence of the Arab-Israeli war of 1967; it lost the Sinai oil fields and canal revenues and suffered "massive destruction of the Suez Canal cities" (Williamson, 1987, p. 117).

Sadat became president after Nasser's death in 1970; particularly after Egypt's "successful counter-attack on Israel during the October [1973] war", Egypt shifted away from Arab Socialism and followed a new 'Open Door Policy' "to encourage private capital investment and stronger links with the West" (Williamson, 1987, p. 117). This policy, which was continued during the first decade of Mubarak's presidency (1981–1991), led to increased trade with and aid from the United States and other capitalist societies, but it also dramatically expanded Egypt's inflation rate and foreign debt (Amin, 1995, 2000). During and after the first Gulf War in 1991, Egypt's debts were forgiven by Gulf countries, the United States, and international agencies, but at the cost of having to implement a structural adjustment program (Amin, 1995, p. 19). Though the UNDP and INP (2005) called the program "successful in reducing both internal and external imbalances", they also noted that "its impact on economic growth has been disappointing" as by 2005 it had not managed to "raise the average growth rate back to the pre-1991 levels" (p. 86).

DISCOURSES ON EDUCATIONAL REFORM: QUANTITY, QUALITY, AND PEDAGOGY

In this section we sketch the goals and rationales for educational reform in Egypt, as articulated by the Egyptian government, the U.S. Agency for International Development (and subcontracted international nongovernmental organizations), and multilateral organizations (e.g., UNESCO, UNICEF, and the World Bank).

Egyptian Discourses, Pre-1952

Egypt has a long and rich educational history, including not only the celebrated pharaonic times but also the period after the founding of Al-Azhar University in 975, when Egypt was "the center of Islamic scholarship, education, and thought" (Cochran, 1986, p. 1). While a strong pedagogical tradition is associated with Al-Azhar and other qur'anic schools, which emphasized rote learning and memorization (Boyle, 2006), it is important to note a competing tradition among Islamic scholars and educators. For example, al-Jahiz (776–868) promoted using "*deductive reasoning*" as well as "memorization" and Abu Nasr al-Farabi (870–950) elaborated a view of "instruction … as an *interactive process* that … ensures that both teacher and student participate actively in the process …, allow[ing] the instruction to be student-centered, since the aim is for the teacher to facilitate the student's own voyage of discovery" (Günther, 2006, pp. 375–76).[2]

When Mohamed Ali assumed political leadership of "modern" Egypt in 1805, he established a secular education system alongside the Islamic Al-Azhar system, though both systems seem to have been dominated by teacher-centered, knowledge-transmission pedagogies. Unfortunately, subsequent political leaders—Abbas Hilmi (1849–54) and his son Said (1854–63)—"contributed to the decline of 'modern' *secular* education by closing" schools (Cochran, 1986, p. 4). And although the education system began to serve a larger proportion of the population during the rule of Khedive Ismail (1863–79), this momentum slowed during the British Occupation period (1882–1922).

During Egypt's "semi-independence" (1922–1952), "great advances took place in public education at all levels" (Cochran, 1986, p. 1). For instance, the 1923 Egyptian Constitution stated that education should be free and compulsory for children aged 6 to 12, and between 1920 and 1930 the percentage of the government budget devoted to education rose from 4% to 11% (Cochran, 1986, p. 23; Williamson, 1987, p. 107). Nevertheless, while the system experienced significant quantitative expansion, questions of quality and relevance remained. For instance, "teaching in the schools … consisted mainly of inculcating abstract or factual information, *learned by rote* in the traditional way, without any attempt to relate it to the problems of Egyptian society" (Radwan, 1951, as cited in Erlich, 1989, p. 97).

Egyptian and International Organization Discourses: 1952–1990

Following the 1952 Revolution, the Egyptian government headed by Gamal Abdel Nasser launched his "education revolution", which "involved eliminating fees and expanding access to education at all levels" (Williamson, 1987, pp. 118–119). Article 18 of the 1971 Constitution officially states that education "is a right guaranteed by the State" (ARE, 1971).

While Anwar Al-Sadat, Egypt's second president (1970–1981), moved away from some of Nasser's "Arab Socialist" policies, his administration continued to invest in education and to establish closer relations with the United States and

Western societies and international organizations. Certainly, Egypt made progress in expanding access to education during the Sadat era as a result of Egyptian initiatives—with and without foreign assistance. For instance, the Ministry of Education (MoE, 1979) published a working paper on the development and modernization of education in Egypt. It "argued that intellectual, political, social and economic developments within Egypt and the world had created an urgent need to change and update Egyptian education", and it raised "specific concerns … regarding pre-secondary education", including that "*rote memorization* dominates the learning-teaching situation" (USAID, 1981, p. 5).

Although the U.S. government engaged with the Nasser government during the 1950s and early 1960s, for example, by supporting participant training programs in the United States for at least 445 Egyptians, it cut off aid to Egypt in 1965 because of the latter's pro-Palestinian foreign policy in the mid-1960s (Amin, 1995, p. 5). But Sadat's Open Door Policy and Egypt's success in the October 1973 war against Israel and subsequent moves toward a peace treaty enabled it to obtain U.S. financial support for education. For instance, a 1978 USAID "project proposal for improving the efficiency and relevancy of primary and secondary education" involved programs "which would change the style of teaching from those consisting of *lecture-assign–study-recite* to those emphasizing *learning to think-solve problems*-apply to real-life situations" (Cochran, 1986, pp. 96–99).

When Hosni Mubarak became president in 1981, efforts continued toward quantitative growth in education, including extending compulsory education from 6 to 9 years, thus including primary and preparatory levels within "basic education". Mubarak's government also deepened and extended its relations with the United States and other Western development aid agencies. For example, based on discussions begun in the latter part of the 1970s, Egypt signed an agreement with USAID/Egypt to launch the Basic Education Program (1981–1989). The program focused mainly on constructing schools and acquiring instructional materials, but also supported "the Egyptian government's efforts to improve the relevance, efficiency and effectiveness of basic education … and improve the *quality of instruction*" (USAID/Egypt, 1981, pp. 1–2). An indication of what constituted instructional quality is signaled in the first evaluation of this program:

> We were … interested in how the class was organized and taught, how much of the class period was devoted to whole group teaching as opposed to teaching in small groups or individual teaching; whether the teacher or the students did most of the talking; whether the students asked lots of questions, or rarely asked questions; and … the degree to which the *students* were *active* or *passive*, and the degree to which they were *self* or *teacher-directed*. (Creative Associates, 1984, p. 26)

Nevertheless, the program paid relatively limited attention to pedagogy and teacher training, focusing less on issues of quality (including instructional methods) and more on expanding access to schooling and developing the central ministry's organizational structure. However, the latter part of the 1980s witnessed greater international discourse on educational quality. Notable in this regard are the

meetings leading up to and including the Jomtien conference in March of 1990. Part of Article 4: Focus on Learning of the *World Declaration on Education for All* states that "*Active and participatory approaches* are particularly valuable in assuring learning acquisition and allowing learners to reach their fullest potential" (Inter-Agency Commission, 1990, p. 5).

Egyptian and International Organization Discourses, 1991–2000

In 1991, at the end of his first decade in office, Mubarak called attention to what he termed "the crisis in education"; he said that "Education continues to suffer from a predominant focus on *quantity* rather than *quality*" (Mubarak, 1992, p. 5). The following year, the Ministry of Education (1992, p. 43) explained that improving educational quality would mean that education should "change from an outdated mode of teaching dependent on *memorization and repetition* to a new form of instruction, which would include the student as an *active participant* in the educational experience and an active partner *in the learning* process". Furthermore, given the context of an increasingly violent struggle between the government and radical Islamists, the document continues: "Emphasis on rote learning and memorization has produced individuals who are easily programmed and vulnerable … contributing to the prevalence of many social problems, such as drug dependency, extremism, and fanaticism" (MoE, 1992, p. 43).

In 1992, following the 1990 EFA declaration and in the context of Egyptian officials' growing focus on issues of quality and pedagogy, UNICEF, in cooperation with the Canadian International Development Agency, launched the Community Schools Project. The contract signed with the MoE stated that the "community schools would provide *innovative pedagogies* for quality education", especially for girls, "that would focus on *active learning*, … and brain-based learning that would awaken all the child's intelligences, including his or her spiritual and emotional ones" (Zaalouk, 2004, p. xi; see also Farrell & Connelly, 1998, pp. 6–7; Sidhom & Al-Fustat, 2004, p. 26).

In 1996, the World Bank also contributed to the pedagogical reform discourse in Egypt, when, in cooperation with the Egyptian Ministry of Education and the European Union, it initiated the Education Enhancement Program. This project focused in part on "improving the quality of student performance", defined as "significantly increas[ing] students' achievement of basic skills and help[ing] improve their critical thinking skills" (World Bank, 1996, p. 2). This would be accomplished by "improving the *quality of teaching* and learning" and introducing educators to "*new methods of teaching*" (World Bank, 1996, pp. 2, 8). A program evaluation conducted a decade later makes it clear that the preferred outcome was associated with an active-learning, student-centered approach rather than one of formal transmission and teacher-centered instruction, given its focus on four elements:

– *Frontal Teaching* represents the time the teacher, on average, spends on frontal teaching

- *Group work* represents the time the teacher, on average, spends on group work.
- *Teacher classroom management* refers to … giving pupils the opportunity to express their opinions, distributing roles and responsibilities among pupils, encouraging pupils to depend on themselves …
- *Learning strategies* … refers to the extent to which teachers divide pupils into 'cooperative working' subgroups, take into consideration to develop pupils' critical thinking, train pupils in problem solving … (PPMU, 2006, pp. 48–49)

The same year, the MoE (1996, p. 22) elaborated its conception of educational quality, when discussing education as a "national security" issue:

> The democratic framework also necessitated that students through all stages of the educational ladder be exposed to different types of learning tools and materials, and taught necessary democratic skills, such as debate, tolerance for other opinions, *critical* analysis and *thinking*, and the significance of *participating in decision making*. Practicing democracy and functioning in democratic systems is therefore one of the priorities for schools and educational institutions.

Furthermore, Hussein Kamel Bahaa El Din (1997, pp. 107, 119), who served as Egypt's Minister of Education from 1991 to 2004, stated that "it is imperative for us to change from a familiar system that emphasized *rote memorization* and passive learning to a new system that emphasizes *active participation*, with the learner a significant partner in the process". He said Egypt should "give special attention to" training teachers, "exposing them to new methods of instruction, new educational approaches, and new educational technologies".

The document for another World Bank (and European Union) loan project, the Secondary Education Enhancement Project, which was signed by the Egyptian government in 1999, reiterated the concern for "improving quality and opportunity". The project supported technical assistance for "redesigning the curriculum" and "designing instructional materials and in-service training for teachers to enable them to deliver the new curriculum" (World Bank, 1999, p. 7). Training, through both center-based entities and school-based units, was to focus on teachers, introducing them to "new methods of teaching" (World Bank, 1999, p. 8).

Moreover, ten years after the Jomtien conference, the UNDP, UNESCO, UNICEF, and the World Bank co-sponsored the World Education Forum on Education for All in Dakar, Senegal, attended by representatives from many governments from around the world, including Egypt. The Dakar Framework for Action, which was ratified at this 2000 meeting, states in part that "Governments and all other EFA partners must work together to ensure basic education of quality for all, regardless of gender, wealth, location, language or ethnic origin". Among the requirements for "successful education programmes" are "well-trained teachers and *active learning techniques*" (UNESCO, 2000, p. 17). President Mubarak addressed this gathering, highlighting the need to focus on quality (i.e., excellence):

> As the ninth decade of the last century witnessed determination that education is for all, the first decade of the twenty-first century must witness, with more determination and insistence, strenuous efforts to achieve a new vision, i.e., Education for Excellence and Excellence for All. (Mubarak, 2002, p. 67)

In 2000, after the Dakar forum, USAID/Egypt initiated the New Schools Program (NSP). The successful proposal submitted by CARE, the Education Development Center, World Education, and several local partners stated its intent to "develop an effective training program for teachers and school officials and a complementary set of materials to improve the quality of instruction in single-grade NSP schools"; it would emphasize "*active, child-centered learning methodologies* that help students develop strong problem-solving skills" (CARE et al., 1999, pp. 13, 16; see also Aguirre International, 2003, pp. x, 18).

Egyptian and International Organization Discourses, 2001–2004

In March 2001, USAID committed to supporting the Alexandria Education Reform Pilot Project, which was designed to "improve the quality of education in the Governorate of Alexandria" through, among other things, "enhanced training of teachers and school administrators", according to the concept paper (USAID/Egypt, 2001, p. 1). That document also stated that "most teachers … over-emphasize the skill of *memorization*" and need to be trained to use "alternative methods encouraging *student interaction*" (pp. 4–5). Among the topics mentioned in the status report for this project (USAID/Egypt, 2002) were effective teaching methods, student-centered methods, and supervising student-centered classes.

Meanwhile, MoE (2002) similarly identified the following as two key elements of the "future vision of education in Egypt":

- Achieving a Learning Community … Moving forward from a culture of *memorization* and repetition to that of originality and creativity. … Such a community is also marked by the individual's *active role in the teaching/learning process* (p. 140)
- Revolution in the Concepts and Methods of Education … The student's role is not that of a *passive receiver*, but of a *knowledge-producing researcher* and an innovative explorer of technology. These methods addressed all types of intelligence as well as the senses and emotions of learners (p. 148)

The same year, the World Bank (2002) published its sector review of education in Egypt. In discussing "challenges ahead", it mentioned a key one: "to *improve the quality of schooling* … by *changing teaching practices*" (p. ii).

The strategy proposal that USAID/Egypt commissioned to inform its planning for the Education Reform Program (ERP) observed that "children in many Egyptian public schools are living in an environment that emphasizes *memorization and rote learning* of the exam-driven curriculum"; moreover, there

was little use of "new methodologies that encourage and enable *students* to become *active,* enthusiastic *participants* in their own learning" (Aguirre International, 2002, pp. 11–12). Subsequently, USAID/Egypt's request applications for the Education Reform Program (2004–2009) stressed the need for quality improvements "to ensure that universal enrollment is accompanied by the acquisition of critical-thinking skills" and said that "Extensive training is required for tens of thousands of Egyptian educators to adopt *modern methodologies* and promote *active learning* to guide children to acquire essential information and skills for life" (USAID/Egypt, 2003a, p. 4; 2003b, p. 7). And one of them (USAID/Egypt, 2003a, p. 19) indicated that ERP "shall be responsible for school administrators assuming instructional/educational leadership roles within their schools" and "shall also ensure that supervisors become supportive instructional leaders and not 'inspectors'".

Following an intensive effort involving many educators, the Ministry of Education (2003) published the National Standards of Education in Egypt. The introduction said that having succeeded in achieving education for all, "the state is now inspired by the President's vision … for a qualitative change in education". The "document contains standards and performance indicators" in five domains: "the effective school, the educator, educational management excellence, community participation, the curriculum and learning outcomes" (p. 4). Three of the standards and indicators associated with "learning strategies and classroom management" in the "educator" domain are relevant here:

- First Standard: Utilizing educational strategies that meet student needs. [Indicators:] Teacher involves all students in diverse educational experiences suitable to their skills and talents. Uses different strategies to present concepts, introduce skills and explain the subject. Gives students *open-ended questions* and facilitates discussion to clarify and motivate the *student's thinking*
- Second Standard: Facilitating effective learning experiences. [Indicators:] Teacher provides independent and *cooperative learning* opportunities. Divides students into *groups* to promote *interaction* and learning. Encourages positive interaction and cooperation among students
- Third Standard: Involving students in problem-solving, critical thinking and creativity … (MoE, 2003, p. 75)

ERP SUPPORT FOR PROMOTING ACTIVE-LEARNING PEDAGOGIES

As noted above, the government undertook a variety of initiatives to promote active-learning pedagogies. Some of these were undertaken independently and others were pursued with financial and/or technical assistance from inter-governmental (multilateral or bilateral) agencies and/or international nongovernmental organizations. Here we focus on the activities of the five-year, USAID-funded Education Reform Program (ERP), which was initiated in 2004 through cooperative agreements with two Educational Quality Improvement Program (EQUIP) consortia, led by the American Institutes for Research (AIR) and

the Academy of Educational Development. ERP was designed with a governorate-based approach, involving seven governorates: Aswan, Alexandria, Bani-Suef, Cairo, Fayoum, Minia, and Qena. Within each governorate, ERP's work, especially that undertaken by EQUIP1, was to focus on working with educators and community members associated with a "family of schools", including all levels of formal and non-formal education (preschool, primary, preparatory, general/academic secondary, vocational/technical secondary, university-based teacher preparation, and adult). Complementing its decentralized focus on schooling and teacher education in the governorates, ERP (particularly EQUIP2) was also tasked with supporting policy dialogues at the national level, involving educators, government officials, and representatives of the private sector. Further information is available at EQUIP (2005).

We first describe ERP-supported efforts related to teacher professional development as well as relevant ERP-supported activities designed to develop school administrators' and supervisors' capacity to guide/support teachers. As noted in the EQUIP1 proposal for ERP, one of its goals was to "train teachers and supervisors in active-learning, student-centered methodologies" (AIR, 2004, pp. 17–18). Then we draw on qualitative data collected via focus group interviews as well as quantitative data obtained from standardized classroom observations, to report on the impact of the ERP-supported reform efforts as well as the factors perceived to contribute to change in classroom practices.

ERP and Teacher Professional Development

Based on a series of meetings with national and governorate-level stakeholders, ERP/EQUIP1 developed a program of activities for teacher professional development. In the category of teaching strategies and classroom management, it planned workshops on critical thinking and active learning at the primary, preparatory, and secondary levels, and on critical thinking and active learning in math, science, Arabic, and social studies at the secondary level; it also projected developing an Active Learning Kit and organizing workshops on comprehensive education assessment at the primary level (El-Dib, 2007, pp. 4–6).

ERP's strategies evolved over time. It initially followed a *cascade model* of professional development, in which experts organized a trainer-of-trainers (TOT) workshop, designed to develop the knowledge and skills of a group of trainers, each of whom afterwards had the responsibility for training one or more groups of teachers. Subsequently, ERP employed a *refined cascade model*, in which project staff organized workshops with expert consultants to train staff of school-based training and evaluation units (SBTEUs), who would then deliver such training to their colleagues in their own schools or in a *cluster* of schools. By July 2006 ERP further refined its approach to professional development (*TOT with supervised practice*); it added a step in which ERP staff/consultants supervised the initial practice of the school-based professional developers as they planned and implemented workshops for teachers in their schools or school clusters and sought to insure that all training provided for teachers should be provided for school

administrators and supervisors. At times ERP also used a *direct training model*, in which staff and consultants conducted workshops directly for the teachers. Once, in a *collaboration with multiple levels of the training system*, ERP staff collaborated with MoE personnel to design a cascade TOT program, redesign workshop and classroom instructional materials, and implement professional development activities (El-Dib, 2007; ERP, 2006a, 2006b).

ERP and Instructional Leadership Development

The EQUIP1/ERP proposal notes that "teacher training will require follow-up through classroom support and a system of supervision and professional feedback mechanisms" and identifies one of its core tasks as "training instructional leaders (MoE supervisors, school principals/head teachers) in instructional supervision skills, linked to the MoE standards, including classroom observation and monitoring skills, mentoring and training skills, and teacher conference skills (i.e. giving feedback), etc." (AIR, 2004, pp. 9, 11). According to the EQ director and technical advisors, EQUIP1/ERP staff developed a work plan for a multi-level TOT training of school administrators and supervisors:

– ERP staff and consultants prepare a cadre of trainers at the national level
– The cadre then trains a team (composed of a supervisor, head teacher, school principal, and educational grade manager) in each governorate
– The team delivers the same training to selected groups of school administrators and supervisors in their respective governorates
– The groups train school administrators in their respective schools, with supervisors monitoring these trainings

The plan included the creation and use of *school clusters,* defined as groups of 2 to 7 "schools with the same education level (primary, preparatory or secondary) … located close geographically" that "collaborate in planning and preparing training programs, but" with "each school implementing the training" (EQ-ALD/ERP, 2006, pp. 6–7). The plan also focused on developing instructional leaders' skills in conducting standards-based classroom observation, designing and using the tool to evaluate, guide, and support teachers' professional development.

In addition, in the context of carrying out a longitudinal study of teacher and student classroom behavior (see details below), approximately 130 to 170 supervisors per year in ERP's seven focal governorates were trained in the use of the Standards-Based Classroom Observation Protocol for Egypt (SCOPE). During the 2005, 2006, and 2007 workshops, participants engaged in "experiential learning activities to introduce them to the principles of active learning, student-centered teaching, cooperative learning, and inquiry learning". They "received training in two supervision techniques (global scanning and question tracking)" and then viewed "two videotapes (used during the SCOPE I training) showing footage of Egyptian teachers teaching actual students and content from the curriculum". The third through fifth days of training included a focus on "activities designed to

model student-centered inquiry learning, encourage problem solving, and engage learners' higher order and critical thinking skills" (Abd-El-Khalick, 2006, pp. 6–7).

IMPACT OF ERP-SUPPORTED ACTIVITIES ON TEACHERS' CLASSROOM PRACTICES

In this section we present the findings from our analysis of quantitative and qualitative data, assessing the extent to which, if any, teachers' classroom behavior moved toward the use of active-learning pedagogies.

Quantitative Data on Changes in Teachers' Classroom Practices

One source of evidence for examining the impact of ERP-supported activities on teachers' instructional behavior is quantitative: data collected in April in 2005, 2006, and 2007, using the SCOPE protocol. In those three years a total of 2,263 teachers in ERP-supported schools were observed; in 2006 and 2007, 663 teachers from other schools were observed. The SCOPE measures how much the teachers enact the reform-based teaching methods, which are aligned with the educator standards in the National Standards for Education in Egypt (MoE, 2003). Ratings by supervisors, who were specially trained as observers, vary from 1 to 5:

> [R]atings of "1" for teacher behaviors characterize instruction that is traditional; authoritative; teacher-centered; non-collaborative or cooperative; mostly chalk-and-talk ... [R]atings of "5" for teacher … behaviors characterize classrooms in which instruction is reformed; participatory; student-centered; collaborative and cooperative; active; inquiry-based. (Abd-El-Khalick, 2005, pp. 2–4)

Here we discuss the results in terms of gain scores on two of the teacher behavior scales, the Active-Learning Pedagogies–Behavioral Dimension (ALP-BD), and the Active-Learning Pedagogies–Cognitive Dimension (ALP-CD). Each dimension is associated with several observation items:

*Active-Learning Pedagogies–Behavioral Dimension (**ALP-BD**):*

- Engages students in carefully structured cooperative learning experiences
- Implements instruction that targets the development of students' social and collaborative skills
- Actively ensures the participation of all students in learning activities irrespective of their sex, achievement level, special needs, giftedness and other differences
- Uses diverse instructional strategies to promote active student participation in learning
- Encourages students to have a voice in the learning environment

*Active-Learning Pedagogies–Cognitive Dimension (**ALP-CD**):*

- Effectively asks probing and open-ended questions that encourage thinking, and help students explicate their thinking
- Provides students with structured opportunities to reflect on their own learning
- Provides students with opportunities to practice higher order and critical thinking skills
- Provides students with opportunities to develop problem solving skills

Table 1 presents a summary of these gain scores. Note that between 2005 and 2006 as well as between 2006 and 2007 there is evidence of significant average gains. On average, teachers in ERP-supported schools made somewhat greater gains on the Behavioral Dimension (BD) scale (ranging from .28 to .48) than on the Cognitive Dimension (CD) scale (ranging from .18 to .36). While these changes in pedagogical approach are modest, given that these are five-point scales, they do represent consistent moves toward implementing active-learning pedagogies to an extent greater than expected by chance. While recognizing the importance of this evidence of change in instructional practices, we should note that on average, in 2005, the teachers started very close to the "traditional" style (i.e., a score of 1.0) and as of 2007 had not moved even to the midpoint on the scale (i.e., 3.0). On average the teachers in ERP-supported schools were rated approximately 1.4 in 2005, 1.75 in 2006, and 2.05 in 2007 on the Active-Learning Pedagogy-*Behavioral Dimension* scale, while they were rated approximately 1.3 in 2005, 1.55 in 2006, and 1.85 in 2007 on the Active-Learning Pedagogy-*Cognitive Dimension* scale (for details, see Megahed & Ginsburg, 2008).

The impact of ERP-supported activities is further demonstrated if we compare the gain scores of teachers in ERP-supported schools with those of the comparison group of teachers who were working in other randomly sampled schools within the same governorates. As shown in Table 1, the gain scores (between 2006 and 2007) for teachers outside of ERP-supported schools are smaller than for teachers in ERP-supported schools for each school level on both scales, with a slight exception involving preparatory school teachers on the Cognitive Dimension scale. Furthermore, the differences between teachers in ERP-supported schools and those in non-ERP-supported schools are somewhat larger on the Cognitive Dimension scale. Note also that while the gains in scores for two of the three groups of teachers in non-ERP-supported schools are significant on the *Behavioral Dimension* scale, none of those gains are significant on the *Cognitive Dimension* scale. This means that, on average, teachers in ERP-supported schools made more progress toward implementing active-learning pedagogies, particularly with respect to promoting student involvement in critical thinking and reflection. Moreover, compared to teachers in ERP-supported schools, the comparison groups of teachers tended to start and remain closer to "traditional" modes of instruction. On average teachers in ERP-supported schools were rated approximately 1.25 in 2006 and 1.4 in 2007 on the Active-Learning Pedagogy–*Behavioral Dimension* scale, while they

were rated approximately 1.25 in 2006 and 1.3 in 2007 on the Active-Learning Pedagogy–*Cognitive Dimension* scale (for details, see Megahed & Ginsburg, 2008).

Table 1. Gain scores for the two teacher behavior scales

ERP/Non-ERP CLASSROOM BY SCALE	GAIN SCORES BY LEVEL		
	Primary	Preparatory	Gen. Sec.
Teacher Behavior Scales			
Active-Learning Pedagogies–Behavioral Dimension			
ERP ALP–BD: 2006–2005	0.48**	0.33**	0.39**
ERP ALP–BD: 2007–2006	0.33**	0.28**	0.38**
Non-ERP ALP–BD: 2007–2006	0.21**	0.08	0.19**
Active-Learning Pedagogies–Cognitive Dimension			
ERP ALP–CD: 2006–2005	0.32**	0.18**	0.32**
ERP ALP–CD: 2007–2006	0.23**	0.31**	0.36**
Non-ERP ALP–CD: 2007–2006	0.05	0.11	0.05

** Significant at p < = 0.01.

Qualitative Data on Teachers' Classroom Practices

Another source of evidence regarding how teachers' classroom behavior may have changed is qualitative in nature and comes from data collected via focus group interviews with (a) 39 teachers in ERP-supported schools; (b) 37 teachers in other schools in focal governorates; (c) 42 school-based training unit staff; and (d) 39 local (district- and governorate-level) supervisors. During the focus group interviews they were asked two questions:

– From your perspective, what, if any, changes have taken place in the way you (and/or others) teach … compared to three years ago?
– Would you say that you (and/or others) now use more often what some people have called "reform teaching methods" or "active-learning pedagogies"?

Teachers working in ERP-supported schools commented on how their teaching methods had changed over the past three years, noting that they moved from just lecturing to discussion and engaging in dialogue with students and using group work, role play, brain storming, and problem solving:

– I became more democratic in my teaching procedures; I gave students the chance to have a point of view different from mine
– My teaching has become student-centered; the student is no longer a receiver of information
– Active learning proved effective in teaching the concept of the rectangle in geometry

Nevertheless, most of these teachers commented that this change was not easy, and that progress to date had been slow.

In contrast, *teachers working in other schools* did not report experiencing or observing much change in the teaching methods being used over the previous three years. Furthermore, they generally reported that they did not know much about active-learning pedagogies or how to implement them:

– I know that it is about brainstorming, problem solving …, but I don't use it frequently
– I have heard about it from my colleagues, but never got to know about it

Importantly, most *SBTEU staff* and *local supervisors* interviewed noted that they perceived how, in ERP-supported schools, teachers had begun to implement active-learning pedagogies:

– I apply cooperative learning, another colleague uses story-telling, a third likes to use problem solving, and a fourth uses educational corners (SBTEU staff)
– Teachers tend to … divide students into groups and use a lot of activities (supervisor)
– One student said to me, [now] 'you are teaching me how to think' (SBTEU staff)

On the other hand, a few focus group participants said they saw little, if any, change in teachers' classroom behavior. One supervisor said, "In the French language, no change has taken place in the last 20 years, no active learning nor even passive learning!".

Interviewees in these categories stated that the changes were more noticeable in primary schools than at the other stages, and that the movement, while noticeable, was generally not dramatic.

Factors Facilitating Movement toward Using Active-Learning Pedagogies

In this section we continue to draw on the data collected via focus group interviews with teachers, SBTEU staff, and supervisors. We posed the following questions to stimulate discussion on this topic:

– In your view, what has *helped* you [or teachers] to at least begin to implement "reform teaching methods" and "active-learning pedagogies" in your classroom?

– Please describe the professional development activity (or activities) conducted by ERP that was/were *most helpful* to you [or teachers] in implementing "reform teaching methods" and "active-learning pedagogies". Why were they helpful?

The teachers we interviewed in ERP-supported schools identified several factors that contributed to their use of reform pedagogies: the general tendency towards change in their idara/district (e.g., "We were on the same wave of change with the ministry"), overseas training in the United States and the United Kingdom, in-country workshops and other professional development activities, follow-up by supervisors coupled with the change in supervisors' attitude from that of a fault finder to that of an advisor, and the active participation of school and idara administrators in enabling people to attend trainings (e.g., "My personal conviction and the help from the school are the true causes"). Here we focus on their views of in-service teacher professional development programs; we discuss the changing role of administrators and supervisors in a subsequent section.

A large majority of the interviewed *teachers in ERP-supported schools* stated that the project-related professional development activities helped them and their colleagues to implement active-learning techniques in their classrooms. These teachers also pointed out that being trained in the new methodologies gave them the courage, the knowledge, and the skills to handle students' questions and individual differences:

– In fact, I knew the names of the new methodologies before. Active learning, problem solving, cooperative learning, brainstorming, role play, and simulation, were not new …. The crucial thing is that ERP training made me understand how to use them
– Through ERP training programs, I began to understand … my role as a teacher. I even became more democratic in my class
– Active learning is one of the ERP training programs that I benefited from a lot. It removed boredom from my classroom life, when I applied the knowledge and skills gained in the workshops

While these interviewees were generally positive about ERP-supported professional development, they did offer some criticisms and suggestions for improvement, and a few commented on scheduling problems. Interestingly, many of the criticisms focused on the amount and distribution of training, thus reinforcing the statements noted above about the value of such activities:

– I think we need more computer training
– Teachers of English, French, and social sciences were invited less often to training workshops (compared to teachers of math, sciences and Arabic)
– Most of the training workshops concentrated on the primary stage teachers, not the secondary

Having previously indicated that they had not begun to implement active-learning pedagogies, most *teachers from non-ERP-supported schools* could not identify factors that contributed to promoting such reform teaching methods. Importantly, however, many of these teachers expressed a belief that ERP-supported professional development activities could have helped them to implement reform pedagogies; at least one participant in each focus group made a plea for ERP and the ministry to include them in future trainings. For instance, they pointed out the need for training on "methods of teaching our subjects", on "enrichment materials for teaching the subjects", and on "computers [and the] Internet".

SBTEU staff and *local supervisors* echoed the remarks of the teachers in ERP-supported schools; they noted that ERP-supported professional development activities contributed to teachers implementing active-learning pedagogies. They also mentioned other factors that helped teachers to implement reform teaching methods, including the emergence of a "change-welcoming" school culture, the participation of boards of trustees in schools, the spread of the standards culture, school cluster-based meetings, the new relationship between the teachers and supervisors, and the encouragement and positive attitude of school administrators. To illustrate:

- The change in teacher's performance is the result of the intensive training programs they had with ERP in the school or across governorates, especially cooperative learning (supervisor)
- About 90% of teachers who attended ERP training have changed their classroom practices (supervisor)
- [My colleagues and] I began to see the value of being a teacher through the training (SBTEU staff)
- One big change in my mathematics class is getting students to work in research groups, where they obtain the answer to a question through discussion and reasoning (SBTEU staff)

The participants in the local supervisors' focus groups stressed that the trainings were more effective when the supervisor and the teacher both received the same training, as we discuss further below.

Similar to the teachers interviewed from ERP-supported schools, participants in the focus groups with SBTEU staff and supervisors offered criticism or recommendations concerning ERP-supported professional development activities. In part such comments represented indirect praise of the activities, because they argued that teachers of other subjects (or teachers in other schools and districts) should be able to attend:

- We wish that ERP would continue to apply comprehensive evaluation for the primary grades 4–6 for all subjects (SBTEU staff)
- In some classes students do not participate in a way that shows critical thinking, because their teachers have not been trained in using it (supervisor)

– Some subjects like English, French, and philosophy were not covered in the training. Even social studies was included only recently (SBTEU staff)

Changes toward implementing the role of instructional supervision

As noted above, teachers and other focus group participants drew attention to the important role played by school administrators and supervisors in efforts to implement active-learning and other reform pedagogies. Here we address these issues in more detail, drawing on data from the focus group discussions with school administrators stimulated by the following questions:

– From your perspective, in what ways, if any, have school administrators and supervisors in this governorate moved toward functioning like (developmental) instructional supervisors during the last three years?
– How, if at all, have their *interactions* with (individual or groups of) teachers *changed* in the last three years?

When asked to describe how their role had changed in the last three years, almost all participants in the *local supervisors'* focus groups reported movement from being an "inspector" to becoming a source of guidance and support for teachers. They mentioned that they met more often with teachers; tended to use a three-stage model of supervision (pre-class, during class, and post-class); and made systematic use of a classroom observation form (and discussed the findings with teachers). For example, they said,

– The teacher now waits for the supervisor's visit to benefit from him [or her]. In the old days a teacher used to run from the supervisor
– I became a better supervisor, listening first and then commenting. I now understand supervision correctly
– The role of the supervisor has changed by 180 degrees. Now there is integration between the role of the teacher and that of the supervisor
– Most supervisors now use the new methodologies of supervision and observation skills. In the past we were merely inspectors

Some supervisors were less positive in their assessment, though they represented a minority voice. For instance: "There are no new ways of supervision in the schools; supervisors are as they have always been" and "The supervisor, the principal, the headmaster, and senior teachers all are trained on using the observation form, but few of them really use it—mostly supervisors".

While, as noted above, *school administrators* also participated in professional development activities designed to enhance their capacity as instructional supervisors, neither they nor other categories of focus group participants had much to say about how school administrators' behavior had changed in this regard. Indeed, a few SBTEU staff noted that they had not observed as much change in principals' behavior as in supervisors' behavior. For instance: "The principal has

not changed in the same way as the supervisor has" (staff). School administrators, however, made a few statements on this topic. One said, "A principal would now practice his guidance role by supervising teachers and identifying their needs based on the observation form". A teacher said, "Our principal has changed drastically; he used to care about whether the school door is open or not (minor issues). Now he cares about our professional development". And a staff member reported that the "principal [now] holds monthly meetings to discuss our needs and to explain points of weakness and strengths of each of us".

In any case, most participants in the school administrators' focus groups reinforced the generally positive view of change in supervisors' behavior that the supervisors themselves had articulated:

- The ERP SCOPE observation sheet helped the supervisor follow scientific standards in his supervision
- Three years ago a supervisor used to pick up on teachers' errors and embarrass them in front of their students; now both parties agree on items in the observation sheet
- Most supervisors would now follow up with the points of weaknesses they discussed with the teachers to see whether there is any development

Arguably, teachers are the most important source of information on changes in supervisors' behavior. Any reform effort of this type is likely to be effective to the extent that teachers experience this change in their relationships with supervisors. Thus, it is important to note that most *teachers in ERP-supported schools* who participated in focus group interviews reported that they had witnessed positive changes in supervisors' behavior:

- Now we have coordination between the teacher and the supervisor
- A supervisor used to come, sign in the register at the principal's office, and leave. Now, he [or she also] visits classes and fills in the observation form
- The relationship between us [teacher and supervisor] is a positive one; there is no more picking on errors
- [The supervisor] has become like a father to me; even during the break he tends to guide me

In contrast, teachers working in non-ERP-supported schools who participated in focus groups generally did not report positive changes in supervisors' behavior:

- My supervisor helped me in planning for the lesson, but still his main focus was on the formalities—my notes, students' grading sheets, book sheets—with no real emphasis on my work as a teacher
- There are no changes in [supervisors'] conduct; they are still looking for mistakes
- [The supervisor] has lost his dignity because he is not seen as a source of help

Still, a few teachers working in other schools in focal governorates did note some positive change in supervisors' behavior. For example: "My supervisor has changed for the better; he used to search for my negative or weak points, [but] now he uses an observation form, and guides me. I believe this is due to the training he attended with ERP".

Interviewees in this category also communicated continuing shortcomings in the supervisory role played by administrators in their school, though the focus group discussions gave more attention to the supervisor's role: "Compared to the change in the role of administrators, supervisors seem to change faster" and "A principal would normally behave based on compliments and social relationships; he does not provide professional comments". A few teachers working in other schools in focal governorates related positive experiences with the supervisory role played by school administrators. For example: "A principal would normally visit my class, listen carefully to my explanation, and finally tell me some comments and write a report … I like this attitude".

Further evidence of supervisors having changed their behavior, moving from the role of inspector to that of guide/supporter of teachers, is offered by the findings from the focus groups involving SBTEU staff, school-level personnel who are mainly teachers themselves. The large majority view of such staff in all governorates commented that supervisors had changed their behavior in a positive direction:

- The supervisor is the one who uses the observation sheet, while the principal is still picking up errors
- In the old days, we worked to satisfy the supervisor. Now, the supervisor wants us to be satisfied with his comments and guidance
- In the old times, a supervisor used to come and point out faults. Now he evaluates my performance scientifically using the observation sheet

Of course, a small minority of SBTEU staff in each governorate's focus group reported less progress in role change for supervisors. One said, for example, that supervisors "care only about filling out the forms".

Factors influencing change toward instructional supervision

Our discussion of the factors that helped supervisors and school administrators to change from acting like inspectors to becoming guides/supporters of teachers is based on data obtained from the school administrators' and supervisors' focus group interviews, prompted by the following questions:

- What circumstances or factors have helped school administrators and supervisors in this governorate to function more like (developmental) instructional supervisors?

– Now, please describe the professional development activity (or activities) conducted by ERP which was/were *most helpful* to you in implementing the role of (developmental) instructional supervisor
– Why were they helpful?

Participants in various focus groups identified an overall local and national cultural environment as encouraging change in education. One supervisor said that "the biggest factor is the spread of the culture of change in our" district, while a school administrator said that "national standards changed my way of thinking about education in general and changed my role into that of an instructional supervisor". Additionally, some supervisors stressed how the attitudes and dispositions of teachers and school administrators facilitated the changes in supervisory behavior:

– The teachers' desire for change and their belief in the utility of instructional supervision [were important]
– From the very first day when we started working on classroom observation, the teacher, the senior teacher, the supervisor, the principal, and the inspector general all were well informed about it. So, cooperation was a natural result
– Their principals would welcome and encourage the implementation of what they have been trained on

Participants in all of the focus groups emphasized that training and other professional development activities were critical to promoting and facilitating a change in supervisory behavior. Some interviewees mentioned activities organized by other projects, including an effective professional diploma for 36 school principals, which included topics like IT, management, and leadership; sessions for supervisors held by the French cultural center on teaching French; and trainings with the World Bank's Education Enhancement Project. Overall, however, they tended to focus on ERP-supported initiatives. They offered some general comments in indicating their positive evaluation of ERP-supported activities:

– ERP helped me a lot. I made me change the way I think and the way I practice my job (school administrator)
– Professional development trainings were crucial to our development (supervisor)

They also provided more specific examples of ERP-supported professional activities, focusing on a range of workshops and other trainings:

– Training on cooperative learning especially helped in bridging the gap between the supervisor and the teacher (school administrator)
– I benefited from a training program … on the role of educational supervision (school administrator)
– I benefited from trainings on computers and using the [classroom] observation form (supervisor)

– Training on action research, classroom observation, critical thinking, effective administration, community participation, self assessment, and developing a curriculum matrix were all very helpful to us (school administrator)

They also mentioned professional development activities that contributed to changes in supervisory behavior, including cross-governorate visits and inter–system-level exchanges among supervisors, along with travel abroad and training on new methodologies. Also important was the role played by *standards support team members* in Alexandria and Aswan, and the "objective evaluation generated from the observation sheets used by supervisors".

It is important to note, as one supervisor observed, that the most helpful training programs were those "that grouped teachers and supervisors". Participants in other focus groups made similar comments about the importance of teachers, administrators, and supervisors sharing training and other experiences:

– The parallel between teachers' training and supervisors' training paved the way for mutual understanding and even experience exchange (SBTEU staff)
– Through conference meetings we exchange experiences with other supervisors and with teachers (supervisor)
– A supervisor will sometimes help the teacher in presenting the lesson by following a new teaching methodology that they both agree on, simply because they both have participated in the same training program on such a methodology (teacher)
– The principal and the supervisor should always attend the same training programs together in order to guarantee a good result. (school administrator)

Finally, although one supervisor commented that "everything was fine, nothing needs modification", focus group participants offered a variety of recommendations for improving the quality and effectiveness of ERP-supported professional development activities for school administrators and supervisors. As was the case with such activities for teachers (see discussion above), some of the suggestions in effect reiterated stakeholders' perception of the value of ERP-supported professional development initiatives, in that they called for more people to benefit from such participation, and more often. For example, they pointed out that there were more training programs for school principals than for teachers, and that "training should cover all supervisors and not be limited to a certain number responsible for certain subjects in ERP's focal" districts. One administrator "didn't like having many training programs for Arabic, science and math, and forgetting" the supervision issues related to "English and French". Meanwhile, an administrator suggested "holding a monthly meeting with supervisors" to update "them on the new methodologies", and another recommended "more visit-exchanges".

In addition, some called for more follow-up after workshops or after international study tours, to provide guidance and support as workshop participants attempt to implement new ideas and practices, thus making that implementation

more likely. One pointed out the difficulty of diffusing so much information: "We are only 8 trained supervisors and are required to pass this experience to about 500 other supervisors, and we couldn't".

CONCLUSION

In the introductory chapter of this volume, the editors mention that the EFA Global Monitoring Report (UNESCO, 2008, p. 4) recommends that countries "strengthen policy commitments to quality education and create effective learning environments for all students, including … well-trained teachers". In this chapter, we have examined some of the rhetoric and actions toward this end in the Egyptian context. Our review of government, international organization, and project documents reveals increasing attention to improving quality of education, often framed as changing teaching and learning processes from teacher-centered approaches involving transmission and memorization to student-centered and active-learning approaches. This conception of educational quality, interestingly, coincides with two of the common features of quality "alternative school programs" discussed in the introductory chapter: (a) "child-centered rather than teacher-driven pedagogy"; and (b) "active rather than passive learning" (see also Farrell & Hartwell, 2008, p. 19).

Although student-centered, active-learning pedagogies were promoted by some Islamic philosophers/educators in the eighth and ninth centuries (Günther, 2006) and a few Egyptian educators (e.g., Radwan, 1951) criticized the predominance of memorization-oriented, rote learning in schools even before the 1952 Revolution, such discourse did not appear in Egyptian government documents until the 1970s (MoE, 1979). This was also the time when USAID/Egypt documents (e.g., 1979, 1981) began to mention these issues. While the Egyptian government and USAID/Egypt devoted some attention to improving educational quality through reforming pedagogy during the 1980s, the real shift in focus occurred in the early 1990s: from quantitative to qualitative improvements in education. This shift in emphasis is signaled in the World Declaration on Education for All (Inter-Agency Commission, 1990) as well as in Egyptian government publications (Mubarak, 1992; MoE, 1992), and is reflected in the reform initiatives undertaken by the Egyptian government, including important examples supported by UNICEF, the World Bank, and USAID/Egypt. Rhetoric and action promoting active-learning pedagogies were even stronger in the new millennium (e.g., Mubarak, 2000; MoE, 2003). Among the reform efforts undertaken in subsequent years was the USAID/Egypt-supported Education Reform Program (2004–2009).

In terms of strategies for promoting active-learning pedagogies, ERP initially followed a *cascade model* of professional development, where experts organize a trainer-of-trainers (TOT) workshop, designed to develop the knowledge and skills of a group of trainers, each of whom then has the responsibility for training one or more groups of teachers. Subsequently, ERP employed a *refined cascade model*, in which project staff organized workshops with expert consultants to train staff of school-based training and evaluation units (SBTEUs), who would then deliver such

training to their colleagues in their own schools or in a *cluster* of schools. By July 2006 ERP further refined its approach to professional development (*TOT with supervised practice*); they added a step in which ERP staff/consultants supervised the initial practice of the school-based professional developers as they planned and implemented workshops for teachers in their schools or school clusters and sought to insure that all training provided for teachers was also provided for school administrators and supervisors. At times ERP also used a *direct training model*, in which staff and consultants conducted workshops directly for the teachers, but eventually ERP pursued another approach to teacher professional development: *collaboration with multiple levels of the training system*. In this latter approach, ERP staff and consultants collaborated with MoE personnel to design a cascade TOT program, redesign workshop and classroom instructional materials, and implement professional development activities.

Our qualitative data provide evidence that at least some of the professional development activities organized through ERP helped to inform educators about the theory and practice of active-learning pedagogies. Moreover, teachers in ERP-supported schools reported that their classroom behaviors had changed toward employing such pedagogies, a view that was reinforced by supervisors and school-based professional development staff. Such change was not generally reported by teachers working in other schools in the seven focal governorates. Importantly, moreover, these interview findings are supported by quantitative data based on classroom observations: teachers in ERP-supported schools started using more active-learning pedagogies (behavioral and cognitive dimensions) than did other teachers.

The results from ERP-supported pedagogical reform efforts are encouraging, although we should remember that, among teachers in ERP-supported schools, we witnessed only relatively modest movement on average toward using active-learning pedagogies. Moreover, the fact that even such limited pedagogical change was not evident among teachers in other schools in the focal governorates suggests that the reform was "projectized" (limited to settings in which the project was being implemented) rather than being a broader phenomenon. If the goal is to diffuse pedagogical or other types of educational reforms (see Megahed & Ginsburg, 2008), then project staff, government personnel, and international agency representatives need to focus their energies early on in collaborating to promote systemic as well as individual-level change.

Furthermore, the development and use of SCOPE by supervisors and researchers as part of ERP's monitoring and evaluation, as well as the adoption and implementation of a simplified version of this instrument in routine supervisory practice, are relevant to two points made in the introductory chapter. First, that these tools to observe teacher-student interaction are framed around Egypt's national teacher standards reflects the economic globalization aspect of the evaluation dimension: a focus on national standards. Second, the use of these tools to measure, provide feedback, and help improve the quality of teaching is in line with a global trend to use "objectively verifiable" and other kinds of indicators to assess and improve educational quality.

Certainly, focus group interviews revealed that teachers, school administrators, and supervisors who were not part of ERP-supported activities were open to changing their ideas and practices, based on what they had heard about the reform pedagogies through formal and informal channels. However, they were either unable or reluctant to even begin implementing active-learning methods without formally organized professional development activities, and they were not likely to deepen and sustain such reform pedagogies without ongoing guidance and support—at both the interpersonal and policy/system levels. Given the sizable number of teachers (and supervisors and school administrators) who have learned about and come to value active-learning pedagogies, Egypt has a base of educators who could play an effective role in diffusing this educational quality reform. But for this to occur, the Egyptian government (perhaps with support from international organizations) would need to create stronger incentives for teachers to improve their instructional methods and more comprehensive, ongoing professional development that offers teachers—as well as school administrators and supervisors—the requisite capacity building, guidance, and support (see Ginsburg, in press).

Finally, while Egypt lives through the post-revolution transition period, efforts to reform education will need to focus on institutionalizing continuous assessment of students and restructuring the examination system, so that teachers, students, and parents will not be so oriented to preferring transmission styles of teaching and memorization-oriented learning. This point reflects one of the tensions inherent in globalized movements to improve educational quality: implementing reform teaching practices and using un-reformed approaches to assess student outcomes.

NOTES

[1] This chapter draws on documentation research undertaken in relation to the USAID-funded Education Reform Program in Egypt (2004–2009) as well as supplemental research conducted under the USAID-funded Education Quality Improvement Project 1: Schools and Classrooms. For related discussions of this research activity, see Ginsburg and Megahed (2008), Megahed and Ginsburg (2008), and Megahed et al. (2010).

[2] In this and subsequent quotations, we have italicized words for emphasis.

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QUALITY TENSIONS AND ENDOGENOUS DEVELOPMENT

Venezuela's Bolivarian Education System

In this chapter I examine the Bolivarian education reforms in Venezuela. A key consideration behind these reforms is that they occur within a broader context of endogenous development. Importantly, they are ongoing in the sense that Venezuela's Bolivarian project is still undetermined. In this environment, quality is a contested term and any assessment of the quality of the Bolivarian schools will be influenced by the ideological perceptions of the evaluator. For this project, I spent 6 weeks in Venezuela researching these educational reforms by visiting recently transitioned Bolivarian schools and speaking with school directors, teachers, and other school employees. I also spent time in the capital gathering documents related to the larger Bolivarian development efforts. To situate the Venezuelan educational reforms, a comparative perspective is useful to examine different approaches to the notion of "quality". In that vein, after a brief overview of endogenous development, I offer a description of the Bolivarian school system, and then highlight the contested nature of quality through a short comparison of World Bank and UNESCO position papers as they relate to Bolivarian schools.

Venezuela is currently undergoing a comprehensive national restructuring program called the Bolivarian Revolution; virtually no realm of Venezuelan life remains untouched. The aims of this revolution are focused around a platform of social equity and include significant redistribution of state money to programs that target traditionally marginalized sectors of the population. As this revolution unfolds, profound sociocultural changes have occurred along with, and to some extent because of, significant shifts in modes of state functioning. As a sector that intersects with both the state and the marginalized, education is an area that has seen significant reform efforts.

The public education system emerging from this process is designed to align more closely with the professed ideals of the Bolivarian revolution initiated when President Hugo Chávez was elected in 1998. This is an interesting situation as Venezuela's education sector still retains its traditional public and private sectors and adds the Bolivarian system as a third legitimate educational option. These developments have generated complicated dynamics, partly because of the politicized nature of the Bolivarian reforms, but also because, in essence, Venezuela now has two functioning public systems of education.

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 69–84.

These circumstances present a unique context through which to address tensions over educational quality in Venezuela. As the country negotiates its development path and educational focus, there are clear external tensions with respect to the dominant development models espoused by supranational actors such as the World Bank, whose focus on education is primarily the technical role of producing human capital for economic development. Within the World Bank model, educational quality is often a matter of competitive and efficient training with the ideal goal of matching educational outcomes with labor market demands. On the other hand, the professed ideals of social equity espoused by the Bolivarian reforms suggest more humanistic aims of education, including those addressed by international actors such as UNESCO. These models clearly aim to prepare students for employment, but they also include an explicit focus on social and human concerns.

These external tensions represent one area where the notion of quality is contested in Venezuela's Bolivarian education system. In addition, internal tensions arise as Venezuelan citizens and educators negotiate new educational environments and consider legal possibilities created by the Bolivarian reforms. Defining what qualities comprise quality education has been a central concern throughout these reforms.

Through this case study analysis, I will examine the notions of quality that emerge from the Venezuelan Bolivarian schools. To do so, I will situate these schools within the larger social and ideological context of Venezuela's Bolivarian reform project, paying specific attention to the model of endogenous development that Chávez has espoused at the local level. My data for this study come from government documents as well as from interviews with local actors—teachers and principals—working to establish Bolivarian schools.

This study describes a struggle to define and achieve a notion of quality that is representative of many contested understandings of educational quality across the spectrum of educational reform efforts. Throughout the entire process of implementation, tensions are noticeable as Bolivarian school stakeholders struggle to delineate what constitutes quality education in a way that will meet three goals: resonate with local concerns, contribute to Venezuela's larger national development project, and negotiate the complex relationship between the ideological undercurrents of the reforms with respect to the global community.

QUALITY: A CONTESTED TERM

Quality itself is a notion fraught with tension and has received explicit attention in recent decades. As seminal writings (Adams, 1993; Ginsburg & Schubert, 2001) show, coming to an understanding of quality education involves careful analysis of the context from which any particular reform or program emerges. During the process of education reform, actors at all levels are presented with choices related to quality. Ginsburg and Schubert point out that defining quality is only one of the choices available to policy makers addressing quality in education. The definition of quality depends in part on a series of additional choices including the level of

education under reform, who conducts the research, and importantly, who participates in the policy-making process.

Perhaps most significant is the recognition by Ginsburg and Schubert (2001) that educational stakeholders concerned with quality will rarely make their choices consciously or freely. Rather, "ideologies and resource distributions" make some choices impossible and choices have "to be negotiated among different individual and group actors" (p. 21) with differing levels of power. Ultimately they conclude, much like Adams (1993), that country context, along with individuals' perspectives and roles, will determine educational quality.

In a nation like Venezuela, this is a particularly salient point. Both ideologically and from a macro perspective, the reforms are rooted in the larger Bolivarian socialist effort. However, at the ground level, the reforms may be seen as a legitimate opportunity to improve the quality of education rather than being explicitly a part of the larger project. The Bolivarian school reform efforts are constantly subject to a model of endogenous development that, itself, creates new tensions by framing the choices available to local actors. In turn, these actors pressure legal bodies to accommodate local demands. This interplay between the local level and the state level becomes more clear with an understanding of endogenous development.

ENDOGENOUS DEVELOPMENT

A tension experienced globally is summarized nicely by Boisier (2005), who addresses two competing forces on the "local" in this environment of globalization. One force is that of cultural homogenization, which occurs through the consolidation of multinational corporate power. Large firms have the power to determine cultural preferences across increasingly large geographical areas. One effect of this power is homogenization. The counter-force is produced by the growing numbers of movements looking to defend and preserve local traditions. Often operating across borders (e.g. Basques in France and Spain, Aymara in Peru and Bolivia), these movements are strengthened as the economic roles of nations weaken. Certain homogenized cultural desires, such as the growing rights-based literature, augment highly localized social movements. These two forces—homogenization and diversity—operate simultaneously and in opposite directions.

It is in this context that endogenous development acquires its potential. Literally, endogenous development means development "from within". This differs from traditional understandings of top-down and bottom-up development. Vázquez-Barquero (2002) describes endogenous development as a strategy to increase local innovation as well as preserve natural resources and maintain historical cultural heritage. In this context, development is concerned with improving not just a community's production, but also its social well-being. This sociocultural dimension is another point of difference from understandings of development that focus exclusively on economic development, leaving cultural effects either unmentioned or treated as byproducts that can be improved by development. According to Vázquez-Barquero, local identity influences

development initiatives which he considers a key feature of endogenous development.

Ray (1999) sees endogenous development as a process of "animating indigenous capacities" (p. 521). Like Vázquez-Barquero (2002) and Boisier (2005), he explores the notion of "territorial agency". These authors use the term "territory" to avoid contested understandings of "community" and "state", both of which inaccurately imply a degree of internal homogeneity. They use the term "territorial components", Ray says, "to focus the discussion onto the variety of geographical scales that are smaller than the nation-state" and are the location for increasing amounts of "socio-economic, cultural and even politico-administrative action …at the very least, globalization has made the role and status of the state ambiguous and in need of reformulation" (p. 523).

Since endogenous development theory attaches great significance to the idea that sociocultural dimensions affect the development process, the territory from which development initiatives emerge is important. Vázquez-Barquero elaborates an understanding of territory as resulting from long historical processes that shape the territory's organizations, institutions, and inhabitants. Territory, then, is more than just space. It is a place to build upon already developed, existing relationships. Boisier provides a rationale for the motivation individuals have in their respective territory and partly addresses the construction of territory:

> The vast majority of people live their lives in a geographical space with a radius of not more than 500 kilometers. Within that space they live, form a family, work, obtain education and health, pass their spare time, and generally end up being buried there, in this space where everyday life goes on. For any given individual… realizing his own life project depends to a crucial extent on what happens over time in his everyday environment. (p. 48)

Given this process of overlapping individuals operating territorially, Ray (1999) suggests that individuals form networks from which emerge a "development repertoire" of regularly-employed resources and techniques that individuals can use depending on their situation. The two elements of resource ownership and choice are also integral to the notion of endogenous development (p. 525). Similarly, Vázquez-Barquero (2002) states that as regional communities deal with the economic challenges from global competition, they can draw on previously existing development potential. Endogenous development can be thought of as a process of uncovering or enabling a development path to emerge out of existing social networks and territorial culture. This primarily economic focus builds upon, strengthens, and expands those local relationships. Endogenous development theory predicts that unpredictable chains of overlapping social and economic arrangements will emerge that contribute to overall territorial betterment. This process happens within a state, of course, and promoting this model of development can present several tensions for a central government.

A central concern for state governments is how to manage a heterogeneous national development process, while simultaneously creating a unified political

base and maintaining national identity. Ray (1999) suggests that efforts to integrate territory and economies may be compromised by high tolerance and promotion of internal diversity. Endogenous development models encourage the development and expansion of small, territorial economies channeled through various social networks. There is no guarantee that all territories will manage this process with the same success or in similar timeframes. Vázquez-Barquero (2002) points out that endogenous development models do not assume convergence between the various territorial economies. This is a concern, then, for endogenous development as a national model. The endogenous model's reliance on creating social networks requires a level of harmony among the actors in this network. Within a culturally homogenous territorial framework, the formation of these networks seems less problematic, as one can assume relatively low levels of conflict. However, on a national level, especially within states that are very heterogeneous, ethnically and culturally, it is a challenge to keep the levels of conflict low among the various social groups.

Another feature of endogenous development is that, as Ray (1999) describes, it is initiated from the bottom up but sponsored from the top down. The state must, in some way, provide a supportive institutional context for fostering and maintaining emerging social and economic networks. This often means a degree of central funding to support local innovations. The endogenous path, though, is determined by what Ray terms "deliberative democracy". At the local level this process contains the potential to pursue radical development proposals that would counter a state's larger political consolidation project. Lebowitz (2004) points out the danger for the state if a territory's endogenous path begins to infringe upon the system that benefits the powerful. The issue for the state here is one of balance: how to manage a potentially diverse national development project in a way that does not repress local innovation and potential—and does not threaten basic national integration.

ENDOGENOUS POLICY IN VENEZUELA

Venezuela is currently pursuing a stated development path of endogenous development. According to the national development plan, the strategy of endogenous development in Venezuela focuses on several specific areas (República Bolivariana de Venezuela [RBV], 2001). These are eradicating poverty, decentralizing overcrowded urban areas, and including traditionally excluded or isolated peoples (Petróleos de Venezuela, 2005). Venezuela's method of endogenous development relies on a highly decentralized way of initiating development projects: communities define the nature of the projects to be pursued. Financial, material, and administrative support is granted by numerous municipal, state, and federal institutions. Fiscally, endogenous development remains highly centralized, with funds originating in the federal government. In accordance with the principles of endogenous development, participants in this top-down sponsored project, whether individuals, communities, or territories, must adhere to basic guidelines that Vázquez-Barquero (1999) calls incentive laws. These laws form the framework for Venezuela's endogenous development; the ways they are formed

shape and order the ways in which endogenous development efforts can unfold. The formation of the new, state-sponsored Bolivarian schools provides an example of the endogenous development principles behind this structured, territorially-based network creation and innovation.

EDUCATIONAL STRATEGY

With regard to the education sector, two overarching conceptions of quality have been identified as primary concerns (RBV, 2001). The first conception, formal quality, addresses the technical and scientific skills that the system of education will address. Formal quality is similar to a traditional notion of quality that focuses on academics. The second notion of quality is termed political quality; it addresses the qualitative requirements of the endogenous development strategy. Here the stated goals of quality address the instillation of democratic, participatory, and solidarity values. The Bolivarian education system aims to produce citizens who can organize themselves, maintain their cultural identities, and respect individual human rights. In attending to these understandings of quality, the education development plan (RBV, 2001) cites seven specific areas of focus:

- *Guarantee access to the education system.* Education, as a fundamental human right, will be provided to all areas of the country so that every individual desiring education will have access
- *Extend coverage of the education system.* The Bolivarian education sector will be extended to include preschool, technical, and professional schools. Special attention will be given to rural, borderland, and indigenous areas of Venezuela
- *Improve the link between the education system and the economic system of production.* The curriculum, especially in the secondary and technical school subsectors, will be linked formally to the labor needs of the national system of economic production
- *Develop the physical infrastructure of the Bolivarian educational system.* In order to maintain pace with modernization demands, existing school spaces will be improved and maintained. To meet the increased demands and goals of full access, new buildings will be constructed. This is especially important at the preschool and technical school levels
- *Improve post-secondary education.* The primary concern at this level is equity of access. To address this, post-secondary education will be more attuned to the needs of local development and the economy. Plans of study at the post-secondary level will better reflect the context and sociocultural requirements of the surrounding communities
- *Pay special attention to unschooled youth.* To address socioeconomic inequities, youth with no access to formal education, or without experience of it, will be included in the Bolivarian system. This goal will require a comprehensive approach that extends beyond education to the provision of health care and formal documentation of identity

– *Eradicate illiteracy.* The goal is to increase social integration and economic opportunity through a comprehensive approach to illiteracy. Literacy classes will be provided to any student, adult, or community struggling with illiteracy

LEGAL BASIS FOR THE BOLIVARIAN EDUCATION SECTOR

The Venezuelan constitution has been amended several times recently to better reflect the needs of the evolving Bolivarian education sector. The legal scaffolding for the Bolivarian education system reflects efforts at endogenous development. As indicated by the manner and sources of funding, the Bolivarian system relies on community organization and participation in the educational process. Venezuelan educational policy offers clear insights into what is meant by community participation. The country's legal task is to retain the existing constitutional framework for education while modifying the legal framework to reflect the country's comprehensive political transformations.

Article 13 of the Basic Law on Education (RBV, 2006b) states that "The educative process promotes the participation of the family, the community and all institutions". In order to become a Bolivarian school, a school must incorporate the community through specific components or actions. The Ministerio del Poder Popular para la Educación (MPPE, 2006) lists these eight components:

– Shift to become a full-day school
– Integrate health and food services into the school
– Progressively repair existing schools and build new ones
– Equip schools adequately
– Renew the curriculum
– Introduce new forms of school management
– Integrate the school into the community
– See the school system as a social network

These components vary in their degree of specificity and the school manages the implementation of each one. Together, these components, which are described in detail in several state documents, form another scaffolding of support for community and school participation.

THE BOLIVARIAN SYSTEM

A central element of the political and institutional reforms initiated by Chávez is the effort to foster the public participation that the endogenous development policy requires (Gibbs, 2006). The Bolivarian schools were begun in 1999 with the intention of addressing educational inequities at the primary level, as part of a larger Venezuelan state project to address sociocultural and economic development. They targeted marginalized and low-income areas where traditional schools were not coping effectively with the extra-school challenges facing their local communities. The initial effort involved 559 schools; Bolivarian schools have

now grown to number over 3,500 and can be found in every state in Venezuela (Ministerio de Educación y Deportes [MED], 2004).

The Bolivarian education sector currently consists of five subsectors. The sequence begins at the preschool level with Simoncito schools, which serve children aged 4 to 6. These are followed by the Bolivarian primary schools for children aged 6 to 12. Youth aged 12 to 19 then attend the liceos Bolivarianos, or secondary schools. Bolivarian universities, open to anyone aged 19 or over, complete the Bolivarian education sequence. Finally, the informal adult education subsector operates in parallel with the formal Bolivarian sector. Table 1 depicts the sequence of the entire Bolivarian education system.

Table 1. The Bolivarian education system

Name of school	*Sector*	*Age*
Simoncito	Preschool	4 to 6
Bolivarian school	Primary	6 to 12
Bolivarian liceo	Secondary	12 to 19
Bolivarian university	Tertiary	19 and above

Bolivarian schools claim a philosophy of education that is holistic, child centered, and integrated with the local community. The holistic approach covers the entire child-school-community context, and understands these to be intimately related and interdependent. The term child centered speaks to efforts to comprehensively address a child's basic needs, such as nutrition and healthcare. Community integration encompasses a wide understanding of community participation in the school.

Some schools are newly built structures but many are former traditional schools that transitioned to the Bolivarian system. Bolivarian schools operate under several broad, state-mandated guidelines such as being "schools of the community" in addition to implementing several specific requirements such as providing lunch for children. Before the school can make the transition from a traditional school to a Bolivarian school, the community must vote in favor of implementing the transition.

Indeed, before a community can consider supporting a Bolivarian school, the community must be organized. "Organized" here carries certain political connotations, indicating that a community is responding to social programs offered through the Bolivarian Revolution. Becoming organized entails the creation of various community councils. The Community Council Law or Ley de los Consejos Comunales (RBV, 2006a) establishes definitions for a "community" and delineates the myriad possible community organizations that could together comprise various councils. For example, community members could form a health committee that focuses on delivering food to the elderly in the community. Together with other

health-oriented committees, it would make up the community's health council. Community councils could also form in response to community concerns about water. Community councils can form around many issues—so an organized community might have any number of councils in operation. To establish a Bolivarian school, a community must have a general neighborhood association, which acts as a community's representative to outside institutions. This is the body that brings the suggestion of a Bolivarian school to the community for a formal vote.

Once it is legally established, the preliminary step for each Bolivarian school is to solidify community support beyond the initial community vote. Community support is formally addressed at the beginning of the school year with a community assembly, held at the school, and open to anyone from the community. Its purpose is to address any local concern that any individual may have. Concerns are discussed in groups, which together choose certain concerns for the school focus. Out of these meetings, the community develops a diagnostic matrix that reflects the economic, health, and social development challenges in various areas of the community.

In each school I visited, I examined the matrix along with the community's plan for dealing with its concerns. Typical community concerns include potable water, drug use, and teenage pregnancy. Plans to alleviate the identified concerns are then developed formally: Who will address each issue, and how will each issue be addressed? And what will be the time frame for rectifying each issue? While I found that many challenges were similar between schools, each one had the autonomy to conceptualize how it would incorporate the matrix items and community members into its functions. The idea behind this is that the school curriculum is localized to reinforce ongoing efforts at community development.

The diagnostic matrix becomes the key document for encouraging community participation and establishing a relationship between school and community. The contents of the matrix are derived from collaborative input which then formally guides the way that each school interacts with community groups to pursue parallel agendas. Figure 1 depicts this process.

To some degree, the diagram unnaturally isolates the school from this network to provide a picture of the way that schools enter this series of networks. To better capture the existing series of networks, Figure 1 would have to demonstrate the various relationships within the inter-community network. As stated earlier, a community might have many community councils. Considering how these councils might interact with similar councils across different communities, one can begin to develop a sense of how a Bolivarian school is only one part of a densely overlapping, highly intertwined series of networks operating in any particular community. There are many other potential community organizations and modes of integration beyond those mentioned above; they all have the potential to be linked to the school in some way. The school personnel must find their own ways of navigating these possibilities to discover how the school will link with the local community.

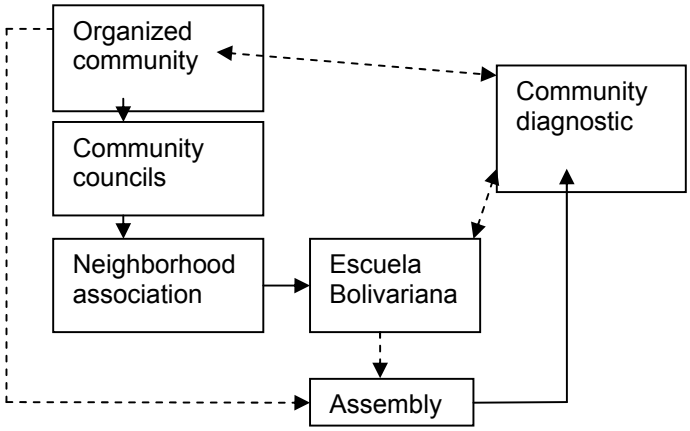

Figure 1. The emergence of Bolivarian schools

Once a community has voted to convert to the Bolivarian education system, stakeholders must manage the process of transitioning from the traditional model and incorporate the eight required Bolivarian components.

EDUCATION FINANCE

Because of its oil revenue, Venezuela is currently in a unique position to provide fiscal support to state-wide, decoupled endogenous development efforts, regardless of their immediate economic return. While it is technically accurate that money originates from the state, it is widely dispersed among various entities that each attend to different aspects of development. Table 2, based on information from my interviews, shows the principal organizations from which the Bolivarian primary and informal education subsectors can pursue funding.

Money from the federal level is provided to each of these organizations and is distributed via grant applications. Rather than each Bolivarian school receiving funding directly from the federal government or from the district level, it must apply for the monies it requires to improve the school and keep it functioning.

The tenets of endogenous development become very clear in an examination of the Bolivarian education financing. Keeping the educational institutions sustainable requires funding, but the process is highly opaque and no apparent formula exists for distributing resources. Especially in the non-formal sector where no institutions exist, funding requires an organized community effort. Committees have to pursue funding, create educational spaces, and collect data to use on applications. This approach to funding the Bolivarian education sector appears to create a structural limit: funding goes to those communities that are ideologically aligned with the larger Bolivarian revolution project.

Table 2. Funding agencies

Name of agency	*Level*	*Function*
Foundation for Building Construction and Improvements (FEDE)	Federal	Engages in large construction projects and infrastructure improvement.
Autonomous Unit of Regional Service Coordination (UCERSA)	State	Engages in smaller construction and project management assistance.
Foundation for Social Development (FUNDESOE)	Federal	Funded an EB school food program.
Regional Foundation for Habitat Development (FUNREVI)	Federal	Improves classroom resources, including libraries, textbooks, posters, etc.
Local mayors' offices	Municipal	Provide small grants and management assistance.
Venezuelan Petroleum (PDVSA)	Public company	Directly funds all informal education programs. Provides revenue that is dispersed via other organizations.
National Army of the RBV (Ejército Nacional de la República Bolivariana de Venezuela)	Federal	Provides labor for construction projects and instructors for physical education classes.

QUALITY AND INTERNATIONAL ORGANIZATIONS

Even in a brief overview of Venezuela's Bolivarian schools system, it becomes apparent that many questions surround an understanding of what constitutes quality in this context. It is worth revisiting the assertions by Adams (1993), and Ginsburg and Schubert (2001): that the parameters of quality are largely circumscribed by the context in which they exist. In this case, the Bolivarian education reforms can be imagined as being situated within the context of Venezuela and its sociopolitical reform. Accordingly, the education reforms and the quality of the education must be assessed using the definitions that correspond to the endogenous principles of local relevance. However, the context can also be imagined as the global context within which Venezuela is situated. In that case the Bolivarian education reforms can be evaluated according to international understandings of what constitutes quality.

Educational quality, as understood by international organizations such as the World Bank or UNESCO, is contested. The tensions surrounding the quality of Bolivarian education vary considerably depending on which organizational understanding of quality serves as the benchmark.

The World Bank's (1999) education sector strategy document states that the primary purpose of education is to develop human capital for the purpose of macro-level economic growth. Individuals must have access to a primary and lower secondary education of "at least adequate quality" so they can "acquire essential skills to survive and thrive in a globalizing economy" (p. 6). Education "must be of good quality" to provide the skills people need "to operate successfully in complex, democratic societies with changing labor market needs" (p. 7). This document also clearly advocates for decentralization coupled with the privatization of education. Very clearly, in the model identified in this strategy paper, a quality education is that which best equips individual students to compete in a market economy. The state's position as a guarantor of quality education gives way to a decentralized and privatized model.

More recently, in a World Bank position paper on education quality and economic growth, Hanushek and Wößmann (2007) identified educational quality as a measurement of "what people know" in terms of quantifiable cognitive skills such as literacy, math and science (p. 5). They place the definition of quality directly onto students as measured by their international test scores. Using country data from around the world, the authors state that a quality education "can increase the human capital in the labor force, which increases labor productivity and thus leads to a higher equilibrium level of output" (p. 3). To achieve quality as defined this way, the authors suggest a series of policy recommendations. They focus on school choice and competition, decentralization and school autonomy, and strong accountability (p. 16). Their description of choice focuses primarily on the choice between public and private education. Their propositions for holding schools accountable rely primarily on data gathered in England and the United States; they maintain that external tests, coupled with public reporting of scores and low-score sanctions, encourage schools to make better decisions. Ultimately, to ensure quality, "all people involved in the educative process have to face the right incentives that make them act in ways that advance student performance" (p. 21).

According to this understanding of quality, Venezuela's Bolivarian schools might not be seen as providing a quality education. The parameters established by Hanushek and Wößmann (2007)—competition, autonomy, and accountability—are not guiding factors for establishing a Bolivarian school. Indeed, Bolivarian schools appear less concerned with following the model of market-led human capital development. For example, no exam system is in place for comparing student or school-wide test scores across grades or across schools. Autonomy as a feature of quality is also complicated by the process through which Bolivarian schools emerge. After the community has voted to establish it, a Bolivarian school is expected to respond to community-defined needs in some way. In this case, the trade-off with autonomy is increased local relevance. The mechanisms by which schools are funded would also appear to limit autonomy. A community and school must organize themselves according to the guidelines established at the national level in order to gain access to school funding organizations. This seems to ensure that the Bolivarian education sector is limited to those communities that are

ideologically aligned with the larger Bolivarian revolution project. It also suggests that local school autonomy is delimited by national-level guidelines.

On the other hand, because of the endogenous principles underlying this development model, individual Bolivarian schools have a significant degree of autonomy in implementing the required Bolivarian components. The power to manage the components is decentralized to the school level. This constant tension over centralized decentralization is a feature of the endogenous development model.

Now, if we turn our attention to a notion of educational quality articulated by Blanco et al. (2007) in a background paper for UNESCO titled *Quality Education for All: A Human Rights Issue*, we find a different articulation of quality education. Aligning themselves with a humanist model that emphasizes the development of individual students' abilities to "assign meaning to what they learn" (p. 23), the authors describe education quality as including respect for others' rights, mechanisms to ensure equity, and a relevant and pertinent curriculum. They argue that education is a human right, based on their belief that the purpose of education is "the full development of human personality and of strengthening respect for human rights and basic freedoms" (p. 25). They say that education should not be considered a market commodity since individuals with no education will not be able to participate in society, attain employment, or learn to express themselves freely. Consequently, states are charged with ensuring a system of quality education that all individuals can access and benefit from.

The position articulated here questions the neo-liberal notion of competition, choice, and publicized sanctions as a model for achieving equity. Instead the authors describe three kinds of equity: equity of access, of resources, and of learning. This means that sufficient numbers of schools must exist with state resources distributed according to economic need, along with a situation in which "learning results do not reproduce the inequalities related to the origin of students" (p. 35). A relevant and pertinent curriculum addresses the questions of education for what, and education for whom. "From the perspective of UNESCO, education for the XXI century should develop competencies related to learning to know, learning to do, learning to be, and learning to live together" (p. 38). Realizing such broadly stated goals requires a curriculum that can negotiate a series of balances: between local and global concerns, between market and personal needs, between commonality and diversity, and between segregated disciplines and integrated knowledge. The authors recognize that this comprehension of quality is less well defined and subject to critique, but they stress that persistently low quality education must be addressed in innovative ways. They suggest that traditional models of education, as well as the trends evident in neo-liberal globalization, will not effectively generate quality systems of education.

The positions advocated by Blanco et al. (2007) appear to align more closely with the professed goals of the Bolivarian reforms—where quality is linked to local relevance and community engagement. These types of quality indicators tend to be less measurable and can be subjected to the critique that Blanco et al. anticipate.

The Bolivarian system attempts to guarantee local relevance and community engagement by requiring the community to participate in implementing a Bolivarian school and contribute to the curriculum. However, as Cooke and Kothari (2001) caution, participation itself is a highly contested notion and mechanisms to facilitate community participation can often be fraught with complex power dynamics that could reinforce existing social hierarchies.

Local relevance and community engagement might also be imagined as a consideration of the context from which a child arrives at school each day. In this sense, Bolivarian schools do address this notion of quality with their required full-day component. Certainly this is appealing to parents who might otherwise be unable to look for work because they need childcare for half of the day. It is also child-focused in that it offers a guaranteed lunch; the traditional half-day schools did not do so. This attempt to control for external factors can be seen as a way to increase equity and quality (Casanova & Fernández, 2004). In some schools children were even weighed each quarter, to ensure they did not lose weight, as a way to monitor their nutrition.

CONCLUSIONS

Even with this brief discussion it becomes clear that defining and pursuing quality depends on a series of deeply held assumptions about the purpose of education. Based on one's response to this question, efforts to achieve and maintain quality rely on choices about how to define quality, how to pursue that definition of quality, and which actors will participate in the process. As international agencies continue to pursue their respective quality agendas, understandings of quality and how to pursue it will undoubtedly continue to evolve. This in turn colors the perception of quality of any particular reform effort. Given Venezuela's current situation, the perceived quality of its Bolivarian reform efforts may be colored in many ways depending on which development paradigm the viewer holds. Nevertheless, several concrete tensions will need to be resolved as the reform unfolds.

One of the most immediate challenges will be to continue expanding access to education beyond the primary level. Currently, there are more Bolivarian schools at the primary level than the secondary or tertiary, but expansions are planned. Tensions regarding quality will likely arise if students need to transfer from a Bolivarian school to a traditional school. Because the philosophical underpinnings of the traditional system differ from the endogenous development goals of the Bolivarian system, quality indicators and student assessment mechanisms will not be the same. It seems that the state's challenge is to enable all Bolivarian students to continue their education through the tertiary level in a Bolivarian system. Finally, the endogenous model of development can lead to widely divergent outcomes in school quality. The current Bolivarian system appears to favor school directors who can navigate the rather complex funding options and who can write grants effectively. Rural or indigenous communities located farther from regional centers might face significant challenges in securing funding, and much different

schools as a result. The endogenous development model suggests that the formation of local-level networks will eventually translate into an overall project of national development. The Bolivarian schools are one node in this network, but it is still too early to determine whether and how these schools might contribute positively and sustainably to this project. Articulating this role could be one of the biggest quality tensions facing Bolivarian schools.

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A NEW GOVERNMENT'S POLICY INITIATIVES FOR SCHOOL REFORM IN KOREA

The Republic of Korea has achieved remarkable development in education over the last six decades. Korea became a nation in 1948 and reached universal education at the primary and secondary levels within a half century; meanwhile it entered the stage of universal education at the postsecondary level, as more than 80% of high school graduates go on to further education. From the qualitative perspective, Korea's class sizes and pupil-to-teacher ratios are equivalent to those of member nations in the OECD. In addition, Korean students are well known for outperforming many of their counterparts in other countries on international achievement studies including TIMSS (Trends in Mathematics and Sciences Study) and PISA (the Program for International Student Achievement).

Nonetheless, along with economic globalization, Korea's attainment of a knowledge-based society calls for the transformation of its educational system (World Bank, 2000). In a globalized and knowledge-based society, competiveness emerges as a key element for continued prosperity. Accordingly, the content of education and the levels of academic achievement that individuals are expected to reach need to be redefined. More specifically, individuals as members of the society are expected to achieve more than a basic and core competency in education (Newmann et al., 1996; OECD, 2001). In order to accomplish this authentic achievement, and increase the qualitative relevance of education, a new approach is required to the policy and governance of education.

Despite the need for Korea's educational system to engage in continued transformation to engage with this emerging global society, many of its schools, especially at the secondary level, retain an almost exclusive focus on preparing students to take the college entrance examinations. Moreover, they lack autonomy and diversity in their program operation, largely because previous Korean governments placed an excessive emphasis on using egalitarian approaches to guide the entire educational system. Further, the dramatic expansion of for-profit private tutoring, referred to as *shadow education*, increasingly threatens the future of public education.

The Roh Moo-hyun administration (2002–2007), referred to as a participatory government, proposed several educational initiatives to strengthen public education, including the implementation of afterschool programs. Likewise, the current Lee Myung-bak government (2008–present) has also declared its own educational initiatives to enhance public education, including the 300 Project to

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 85–102.

develop a diversified high school system and a plan to increase autonomy in the college admissions system.

The Lee administration's approach to the policy goal of strengthening public education presents a contrast to that of the previous government. The Lee government states that its governing principles for education are choice and competition, often regarded as the main principles of a free market. This approach emphasizes autonomy, accountability, and diversity in education, in contrast to the Roh government's main policy line for education, which was based on an egalitarian approach, using a model of government control and management that placed a great emphasis on equity in education. Scholars and policy makers now ask which approach will help the country achieve its policy goal of both enhancing public education and supporting those innovations within the education system that are necessary to catalyze the transition to becoming a knowledge-based society.

In this chapter I assess the overall direction and governing principles of the current Lee administration's educational initiatives, using the conceptual frameworks of strategic policy and governance of public education in a knowledge-based society. I first address the internal and external challenges currently facing public education in Korea and tasks to be undertaken to meet the range of challenges of the emerging global society. Further, I suggest conceptual frameworks for strategic policy and governance of education which are necessary to transform the education system in the emerging global society. I then assess the overall directions and governing principles in education policy of the current government, within the suggested conceptual frameworks, and end with several policy recommendations.

CHALLENGES AND TASKS OF PUBLIC EDUCATION IN KOREA

This section describes internal and external challenges facing Korean public education and suggests several actions to address them.

External Challenges: Globalization and the Advent of the Knowledge-based Society

In the contemporary world, many countries, including Korea, face the challenges raised by globalization and the advent of the knowledge-based society. Economic globalization refers to a process of economic change that gradually removes the barriers between countries regarding goods, services, capital, and labor, while domestic marketplaces become increasingly integrated into one single global marketplace. A knowledge-based society, on the other hand, is a new type of society in which the production and management of knowledge, rather than goods and services, becomes important to ensure competitiveness at both the individual and national levels. As a result, producing high-quality human resources emerges as a central task in education. Within globalization, therefore, the advent of the knowledge-based society results in a situation in which (1) individual competence and learning ability are valued more highly; (2) producing high-quality human

resources becomes an important task for education; and (3) nations face the immediate issue of enhancing competitiveness by producing a high-quality work force.

These societal and economic changes call for a redefinition of competence or academic achievement as well as modifications in the role of public education. Rychen and Salganick (2003) suggest three major categories of competency: relationship, self-directiveness, and literacy. The competencies that individuals are expected to achieve in the knowledge-based society include the following: (1) basic literacy in terms of reading, writing, and math, and skills in ICT (information, communication, and technology); (2) self-directed learning and creative problem-solving ability; (3) workplace-related abilities; (4) self-respect; and (5) the ability to cooperate.

The requisites for participating in a global economy suggest that the Korean education system must undertake several tasks. Above all, it should develop more flexible educational programs to meet the diverse needs of students and families. In the past, many educational policies have focused on developing equality across educational conditions, resulting in the standardization of the educational system. Therefore, diversity in education that can help students to fully develop their academic potential and creativity should be pursued as a policy goal. This change requires a paradigm shift from the existing supplier-centered education to student-centered education and caring (Beck, 1994) in school management.

Internal Challenges and New Tasks

Disagreements on the purpose of education and the criteria for academic achievement. There are disagreements about the purpose of education and the criteria for measuring academic achievement. Differences exist between the social and individual definitions of the purpose of education. At the societal level, education is regarded as a major means to increase global competiveness because of its role in producing high-quality human resources with creativity, self-directed learning ability, and creative problem-solving skills. At the individual level, on the other hand, education mainly remains a means of obtaining credentials from elite universities. This social disagreement on the purpose of education often interferes with the further development of public education in Korea.

To bridge this gap, social consensus should be sought first with respect to the general purpose of education. We need an answer to the question of what we want to achieve from public education. Then, we need to redefine the contents and criteria of education, and measure academic achievement based on those new definitions. Finally, we need to ensure that the criteria for achievement are reflected in the criteria for college admissions.

The education system's delayed responses to social change. Although Korea is becoming a knowledge-based and information society, its educational system lags behind this societal change and is failing to meet the diverse needs of students and parents. Schools are overly occupied with preparing students for exams using rote

learning. This problem occurs largely because the education system is not flexible and diverse enough, a result of the supplier-centered approach to school management. To respond to rapid social changes in a more timely way and to address the diverse needs of students and parents more appropriately, schools must be given more autonomy. Then they will have more flexibility to develop school programs and can assume responsibility for the outcomes. The rigidity and uniformity of the educational system could be eased by transforming school management from the current supplier-centered approach to a more consumer-centered one.

Ideological conflict and lack of school accountability. The teachers' union that was legalized in the 1990s emerged as a major interest group, and includes NGOs such as parent organizations. Ideological conflicts between the union and government policy often make educational reform less effective and delay the implementation of educational initiatives. Even worse, such conflicts and resistance often make it impossible to take action to address urgent issues. This has been the case for government efforts to enhance school accountability. Education initiatives to increase levels of autonomy, responsibility, and assessment are often discouraged by the resistance of teachers' unions that view such efforts as policy driven by neo-liberalism. Arguing that any kind of neo-liberal educational policy will increase inequality in education, the unions resist all government efforts to ensure autonomy and accountability. Although such criticism is worth considering, placing an excessive emphasis on the issue of inequality tends to weaken schools' accountability by taking away individual schools' responsibility for educational outcomes. In this context, the use of alternative approaches, such as introducing school choice and competition among schools, should be considered as ways to help enhance accountability. First, however, Korean society must reach a consensus on the use of the alternative approaches.

Disengagement from learning. International achievement studies such as PISA and TIMSS show that on average Korean students score well on such tests, but they also suggest that Korean students show relatively lower levels of intrinsic motivation for learning, compared to their counterparts in other countries. This indicates that despite their outstanding performance, Korean students do not take as much pleasure in learning as their counterparts in other countries (McGaw, 2005). As noted earlier, in the knowledge-based society, self-directed and autonomous learning ability become important for students to achieve desirable levels of performance and competitiveness. Therefore, Korean education should create school settings that increase students' motivation to learn and thus increase their capacity for self-directed and autonomous learning.

Excessive dependence on shadow education. Currently, many Korean parents seek private tutoring so their children will do well, not just on the college entrance examinations, but on any kind of exams at the primary and secondary level. As a

result, every year, Koreans spend an enormous amount of money on shadow education (see Table 1). At present, the current total amount that parents spend on shadow education is equivalent to nearly half of the government's total budget for education. Further, an increasing number of parents decide that their children will study overseas, some starting in early childhood. In this situation, the more the parents and students support shadow education, the more they distrust public education; this excessive dependence on shadow education increasingly threatens public education. However, the desires of both parents and students to pay for shadow education should be considered with great care; it might be possible to transform their enthusiasm for shadow education into the energy needed to provide more funding for public education. Therefore, educational initiatives to strengthen public education should be connected with the efforts to reduce the demand for shadow education.

Table 1. Estimated yearly household expenditure on shadow education, 1997–2008, in billions of won

Year	*1997*	*1999*	*2001*	*2008*
GDP (A)	491,135	529,665	622,123	1,023,938
Total household expenditure on shadow education (B)	9,598	8,727	12,276	20,900
B divided by A (%)	1.95	1.65	1.97	2.04

Source: KEDI (eng.kedi.re.kr)

In summary, public education in Korea faces external challenges raised by globalization and the advent of the knowledge-based society as well as internal issues including disengagement from learning and excessive dependence on shadow education. To address these challenges and issues, several tasks need to be undertaken. First, however, it is necessary to lay out a strategic policy and governing principles to transform the education system. In the next section, I discuss alternative conceptual frameworks for strategic policy and governance of education.

CONCEPTUAL FRAMEWORKS FOR DESIGNING A NEW STRATEGIC POLICY AND GOVERNING PRINCIPLES OF PUBLIC EDUCATION

In this section I describe a conceptual framework for designing a new strategic policy, and then some governing principles that will allow public education to address the challenges and issues described above. In the following section, I then use the conceptual framework to assess the Lee administration's educational initiatives and governing principles.

The Redesign of Strategic Policy

Strategically formulating policy means defining important policy tasks and relating them to each other to achieve desirable outcomes. The first order of business in designing a strategic policy is to redefine the concept of academic achievement that public education should pursue in the knowledge-based society, and then clarify the criteria for redefined academic achievement. The new definitions of academic achievement and the new criteria will lead schools to develop a range of educational programs from which students can choose according to their interests. In considering the diversity of students' needs and school programs, universities must use diverse criteria for selecting students. Figure 1 depicts this structure of strategic policy tasks. More detailed descriptions of the strategic formulation of policy follow.

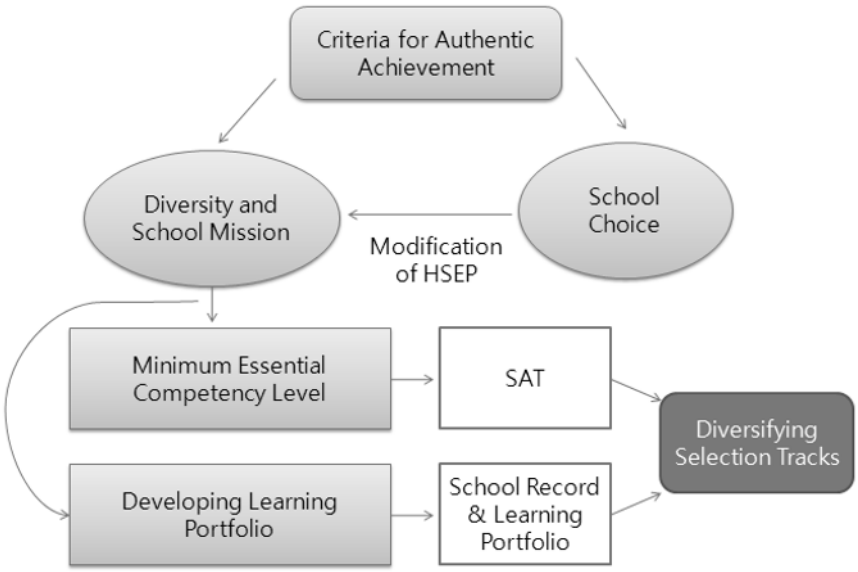

Figure 1. The structure of strategic policy

Redefining academic achievement and criteria in the knowledge-based society. The concept of and criteria for academic achievement required in the knowledge-based society should reflect the universal and inherent values of education. Thus far, in modern societies, education has focused on functional human development by emphasizing the acquisition of knowledge. In this society, academic achievement mainly means test scores. However, education in the knowledge-based society should focus on the development of the whole person. We aim to cultivate knowing, humanity, and morality in public schooling; we see those as capacities that are developed in the educated person. But this development will not

be possible if academic achievement is measured only by test scores. Thus, the criteria for academic achievement must be redefined by including self-directed learning ability, creative thinking, and problem-solving abilities, which will allow students to use knowledge creatively, rather than to merely memorize it (C. J. Lee, 2006).

Using the newly-defined academic achievement criteria in the college admissions system. As noted earlier, the Korean education system has focused on preparing students to take the college entrance examinations. Accordingly, previous Korean governments have intervened deeply in the college admissions system, especially by maintaining the so-called three-nos policy. Government measures prohibit universities from (1) administering their own admission exams; (2) accepting donations connected to admissions; and (3) ranking students based on the overall achievement of their high school.

In the knowledge-based society, however, universities will need to be granted more autonomy in selecting students. It is expected that universities will have more flexibility in devising the selection criteria that will give them autonomy in selecting students. In the emerging society, government measures that force universities to use a single uniform criterion for student selection would result in stratifying the university rankings; that, in turn, would increase the demand for supplementary private tutoring. Therefore, educational policy that will increase autonomy in the college admissions system should be implemented.

To diversify the criteria used to admit students to university, a variety of methods will need to be considered, including early decision plans, special admissions, and student learning portfolios, all of which are based not merely on test scores but on new definitions of academic achievement developed by the university. In particular, the use of student portfolios as an alternative to school records (known as *naesin*) would help ease the pressure that students experience in preparing for the exams. When universities select students based on their total scores on the CSAT (College Scholastic Ability Test) and essay exams, along with the naesin, students often refer to these three tests as the Triangle of Death, because of the effort they must invest to prepare for the three kinds of tests.

Revising the high school equalization policy and introducing school choice. In structuring strategic policy, the current framework of the High School Equalization Policy (HSEP) needs to be revisited. The HSEP is an educational policy that allots middle school graduates to high schools within their residential area on the basis of a random computerized lottery. This system was introduced in 1974 to address social and educational problems that arose in the early 1970s, due to excessive competition to enter the elite high schools.

The HSEP appears to have different impacts at different levels of secondary education. At the lower secondary level, for example, it has been said that the HSEP has largely accomplished its aims: The middle school curriculum was normalized and parents now carry less of a financial burden to pay for shadow education. At the upper secondary level, however, the HSEP has been accused of

generating several other problems. For example, it deprives students and parents of their right to choose schools, and it restricts the operational autonomy of schools. In turn, both of these phenomena weaken school accountability.

While the debate over its effects still continues, the HSEP has been maintained over the last three decades, largely because of unproven beliefs and fears about its impact. As noted previously, people believe that the HSEP will promote educational equality and reduce students' learning burdens and parents' financial burdens. At the same time, they fear that abolishing the HSEP would lead popular schools to merge and cream off the top students and thus increase the competition to enter these schools. Because of these beliefs and fears—not yet proven by empirical evidence—government efforts to complement the HSEP often face considerable resistance.

Several problems caused by the current HSEP need to be solved. These include the restriction of school choice, the excessive government intervention in school management, and the uniformity of the curriculum. This does not necessarily mean abolishing the HSEP, but it does suggest the need for constructive complements to it. To achieve this goal, several prerequisites are needed. First, to make students' and parents' choices of school more meaningful, the high school system and educational programs should be diversified. Second, to ensure that students and parents have the right to choose a school and at the same time to prevent excessive competition to enter a particular school, a process should be used that includes a preliminary application and a post-application randomized lottery. In this context, I suggest eight constructive complements to the HSEP:

1. Support school efforts to diversify educational programs
2. Provide independent private high schools with greater autonomy in school management and expand their numbers
3. Diversify the areas where students will be recruited (e.g., the nation, province, or district) to recruit more appropriately for each educational program
4. Establish minimum levels of qualification for selecting students for each program, such as the level of English proficiency for a foreign-language high school
5. Provide vouchers to children from low-income families who apply to private schools
6. Establish public high schools that are granted full autonomy in their academic operations
7. Establish and support dormitory-based high schools
8. Develop specialized vocational high schools and transform them into elite vocational high schools

Designing and Establishing Strategic Governing Principles

To achieve the strategic policy goals illustrated above, it is necessary to revisit the principles governing the public education system in which that strategic policy is to be implemented. For designing strategic governing principles, three models are

relevant: (1) the consumer-centered and accountability model; (2) the horizontally diversified model; and (3) the cooperative governance model. Below, I describe three types of change, one involving each model.

Change in the essential perspective on governing principles for the education system: From the model of supplier-centered control to the model of consumer-centered accountability. Given that modern society is characterized by mass production of fewer types of products, those governing education have a tendency to rely on a few criteria of academic achievement. This tendency goes well with supplier-centered control. However, these criteria generated several problems; in particular the educational system became standardized and the government developed excessive control over school management. This principle of governance will not be appropriate in the emerging society which requires a diversity of outcomes.

In this society that calls for qualitative excellence, creativity, and morality in education, a governing principle based on a model of consumer-centered accountability will be more appropriate to address the diverse needs of students and parents. The consumer-centered accountability model reflects the society's transformation from a focus on the supplier to a focus on the consumer, and from the model of administrative-bureaucratic control to one of autonomy and accountability. Figure 2 shows this change in the essential perspective on the principles governing the education system. Here, process-based accountability means ensuring that the administrative process follows the administrative guidelines and regulations, while outcome-based accountability means explaining the outcomes to those involved.

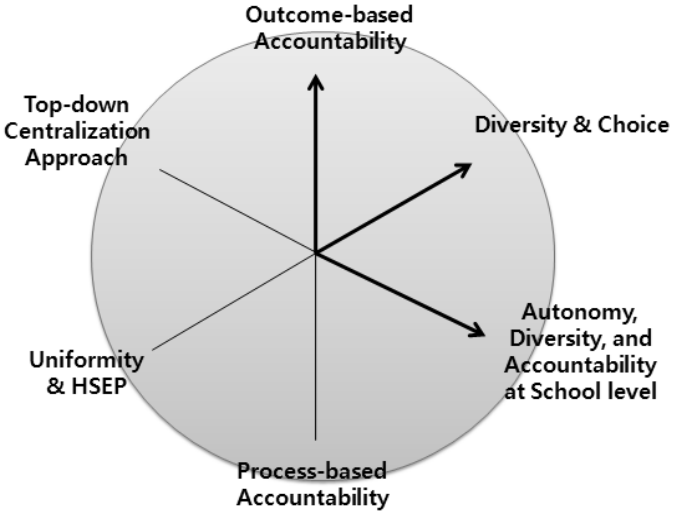

Figure 2. Models for governing the educational system

Change in the perspective on the relationship between equity and excellence: From the standardized vertical-ranking model to a horizontal and diversified model. Without doubt, equity in education is a very important goal and should be pursued. However, equity does not necessarily mean that educational outcomes will be equalized. Rather, it suggests that a government will prohibit unjust discrimination, provide equal opportunities, and eliminate disparities in educational conditions across regions and schools. In Korea, however, the idea of educational equity is often interpreted as sameness along a vertical dimension; this leads to efforts to reduce the differences among schools in their vertical ranking. The high school equalization policy is a case in point. If it were understood in terms of diversity in educational programs along a horizontal dimension, however, the idea of equity could lead to educational opportunities becoming more relevant. In such a system students would be given more options that respond to their various needs but the system would still promote minimum levels of academic achievement. Thus, it could provide real "caring" for the disadvantaged who are, in practice, neglected in the classroom.

Along with equity, excellence also needs to be pursued in the knowledge-based society. Like equity, however, the concept of excellence is often misinterpreted in the Korean education system. If understood in the context of the vertical and hierarchical structure, the pursuit of excellence in education would increase the amount of educational and social inequality. From a horizontal perspective, however, excellence could be seen as efforts to help individuals develop their diverse talents and take advantage of appropriate opportunities. In this view of the horizontal approach, the pursuit of excellence could be regarded as better efforts to help students fully develop their academic potential and diverse talents.

Here it is useful to contrast two different orientations of equity and excellence in education. Equity can be oriented to focus either on uniformity among educational programs or on relevance across a diverse range of programs. Excellence can be oriented either toward achieving higher rankings in the stratification of educational achievement or toward developing students' potential talents.

When we view equity in the context of relevance in diversity and excellence in horizontal diversity, we see that the pursuit of equity and the pursuit of excellence in education are connected, rather than opposed to one another. This relationship between equity and excellence is depicted in Figure 3. The figure shows an open system that links equity to excellence in a horizontal and diversified structure. As noted above, here equity indicates the efforts to make educational opportunities more relevant, while excellence indicates efforts to develop students' diverse talents. In this model of the horizontal and diversified structure, excellence should be pursued based on maximizing the principles of capacity development, while equity should be promoted based on choice of relevant program.

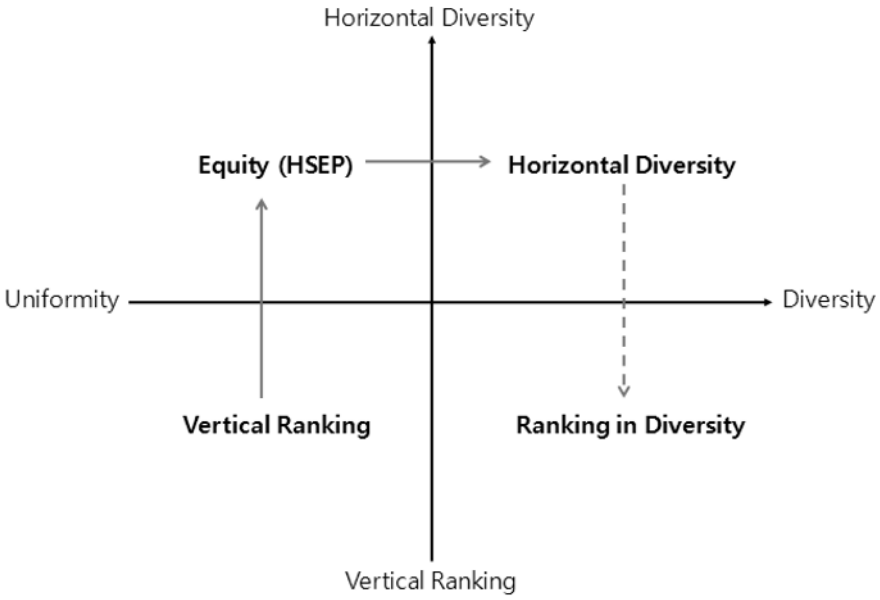

Figure 3. Two dimensions of school situations (ranking vs. diversity and uniformity vs. diversity) and the transitional path of educational policy

Change in the role of government: The cooperative governance model. In the emerging society in Korea, while government reduces its regulatory role in governing education, it must strengthen accountability at the national, local, and school levels by clearly defining the roles and responsibilities of MEST (Ministry of Science and Education), local offices of education (LOE), and schools. In this process, the central government would need to delegate much of its governing authority of education to LOE and individual schools. In particular, private schools that have played a significant role in Korean education should be allowed more autonomy in their academic operation and school management.

In this transformation process, the roles and responsibilities of the central government and MEST need to be redefined. Specifically, the central government and MEST should reduce their roles and focus on carrying out important tasks from the national agenda, while supporting local governments and individual schools in their efforts to pursue excellence in education by ensuring autonomy and accountability, rather than by increasing their control and intervention.

Thus far I have described the strategic formulation of policy and governing principles that must be considered to innovate and enhance the public education system in Korea. For the process of strategically formulating policy, I suggested four policy tasks: (1) redefine academic achievement; (2) develop educational contents and programs based on that redefined achievement; (3) reform the college

admissions system; and (4) complement the HSEP and increasing choice. I also described three models of governing principles: (1) the consumer-centered accountability model; (2) the horizontal and diversified model of educational programs; and (3) the cooperative governance model. In the following section, I use this conceptual framework of strategic policy and governance principles to assess the directions and governing principles in the educational policy of the Lee administration (2008–present).

INTRODUCTION AND ASSESSMENT OF THE LEE ADMINSTRATION'S EDUCATIONAL POLICY

In this section I introduce specific educational initiatives announced by the Lee administration and assess their overall direction and governing principles, using the conceptual framework of strategic policy and governing principles I developed above.

The Lee Administration's Educational Initiatives

To produce high-quality human resources as a response to the external challenges introduced by globalization and the advent of the knowledge-based society, the Lee government proposed several initiatives to reform the current education system. Six of these initiatives are key: (1) increase autonomy in school management; (2) offer school choice to educational consumers; (3) release information to the public and enhance assessments to improve school accountability; (4) maintain the existing principles of collective bargaining with teachers' organizations; (5) diversify educational programs; and (6) offer more autonomy in college admissions.

These educational initiatives aim to increase autonomy, diversity, choice, and accountability in the management of education. The current administration states that its governing principles are introducing school choice and competition among schools. These educational initiatives and the current governing principles are closely linked to each other. For example, greater autonomy in school-based management would enable individual schools to develop their own educational programs that meet the needs of educational consumers, while giving greater choice to educational consumers would make educational suppliers more accountable.

Seeking to increase autonomy, the Lee administration suggests transferring its decision-making authority regarding early childhood, primary, and secondary education from the central government to the LOE. In addition, it recommends that the LOE ensure autonomy in school-based management so that individual schools can implement their own creative and specialized programs. To promote diversity, the Lee administration proposes developing a diversified high school system to address the diverse needs of educational consumers, called the 300 Project and described below. In addition, it plans to support individual schools' efforts to offer

their own special programs within the Plan for Reviving the Characteristics of High Schools.

With respect to choice and school accountability, the administration is attempting to ensure that educational consumers have the right to choose a school and to make educational suppliers more accountable, in accordance with its efforts to increase autonomy and diversity. Thus, under this administration, as educational consumers, parents and students will be able to attend schools of their choice. As educational suppliers, on the other hand, the central government, local governments, and individual schools will become more responsible for establishing programs that meet the diverse needs of educational consumers.

These overall directions and governing principles of the Lee administration appear to be most explicitly expressed in three specific measures, described below.

Autonomy for school managements. The primary goal of the measure called Autonomy in School Management is to decentralize the central government's role in policy decision making and implementation and to enhance the accountability of LOE and individual schools. Under this measure, the central government will transfer its authority to LOE and individual schools, especially with respect to academic operation; it will also reduce its central role in planning and coordinating educational policy and curriculum at the national level.

To this end, the Lee administration first eliminated the government's so-called *comprehensive supervision* stated in Article 7 of the Educational Law for Primary and Secondary Education. This action suggests that it removed all government regulations regarding such areas as academic operation, after-school programs, and level-differentiated course provision. In addition, the government intends to transfer its personnel management authority to the superintendents of LOE. This will give them the right to appoint school principals, senior supervisors, and directors of education training institutes. They will also have the right to set standards for teacher placement and appointment and issue ordinances to establish and close educational training institutes at the city and provincial offices of education.

The 300 Project for a diversified high school system. To allow for a broader range of school choice, meet the diverse needs of students and parents, and reduce family expenditure on shadow education, the Lee administration proposed the 300 Project to create a diversified high school system (J. H. Lee, 2006). This initiative aims primarily to establish 300 high schools, including 150 dormitory-based public high schools, 50 specialized vocational high schools (also known as master high schools), and 100 independent private high schools.

A dormitory-based public high school has a dormitory within the school, allowing students to study and live together. This type of school will be built especially in rural areas and small and middle-sized cities where students from low-income families are concentrated. The students enrolled in these schools will be provided government financial support in the form of scholarships, based on family income. These schools are expected to reduce the existing educational gaps

between students living in educationally disadvantaged areas and their counterparts living elsewhere.

Next, a specialized vocational high school is one that will offer more specialized programs that help students fully develop their vocational talents and skills. An advanced version of the existing vocational high schools, one that offers more specialization, this type of school aims to produce skilled craftspeople in a wide range of fields. To this end, specialized high schools will be granted full autonomy in their school management with respect to academic operation and the appointment of teachers. In addition, they will be allowed to collaborate with industries and non-profit organizations regarding their school management.

Finally, independent private high schools are granted full authority regarding curriculum, teacher placement, and academic operation. In particular, they are required to take full responsibility for finance without any government support. These schools are expected to be more responsive to the needs of students and parents. Meanwhile, the national government will still support those high schools not participating in the 300 Project. It will subsidize 10% of their school budgets in order to help them develop specialized programs that meet the needs of their students and parents. This plan is referred to as the Plan to Revive the Characteristics of High Schools.

A three-phase plan to increase autonomy in the college admissions system. Because it believes that unnecessary government intervention in the college admissions system can impose heavy learning burdens on students, the current government has proposed a three-phase plan to increase autonomy in the college admissions system. First, each university will be given discretion in weighing students' high school records and their scores on the CSAT. Second, students will be required to take fewer CSAT subject tests: five or fewer, down from the current seven. Finally, universities and colleges will have full autonomy that will allow them to select students according to their own guidelines. This three-phase plan is expected to reduce learning burdens for students and improve accountability at the post-secondary level.

Directions and Governing Principles in the Educational Initiatives of the Lee Administration

To better assess the overall direction and governing principles of the Lee administration's educational policy, I suggest four criteria: (1) excellence, (2) equity, (3) mandates, and (4) choice and autonomy. These four criteria can be depicted in two dimensions with two axes, as shown in Figure 4. In the figure, the vertical axis indicates the contrasts between core values (excellence vs. equity) in the pursuit of innovative educational policy. Meanwhile, the horizontal axis indicates the contrasts between the methods used in that pursuit: mandates vs. choice and autonomy. Here, excellence indicates horizontal and multi-dimensional efforts, rather than vertical and hierarchical stratification, along with protection for educationally disadvantaged groups.

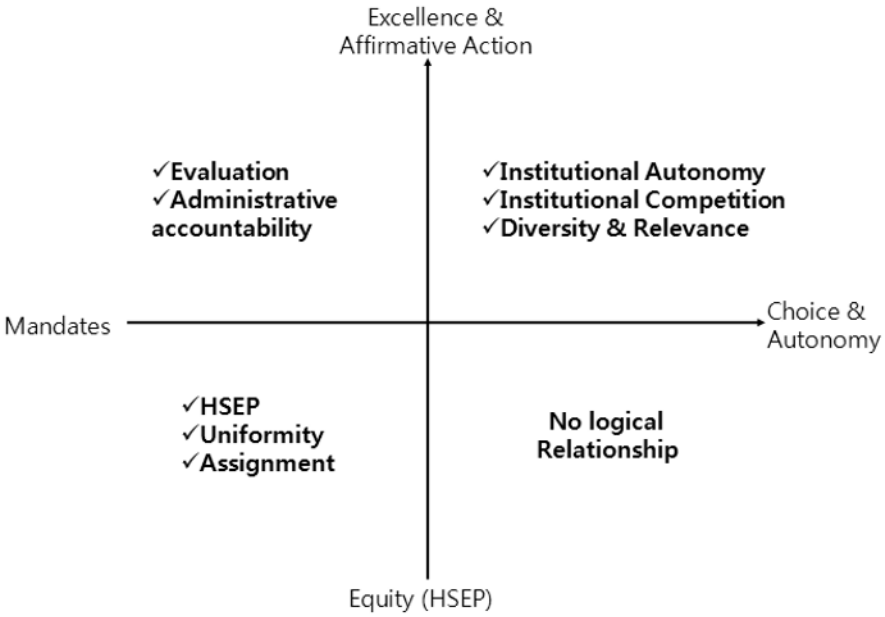

Figure 4. Educational policy orientation

As shown in Figure 4, the educational initiatives of the Lee administration move from the upper left quadrant to the upper right quadrant, suggesting that educational reform is currently moving in the directions of institutional autonomy and competition, and diversity and relevance. Overall, therefore, it can be concluded that the administration's educational initiatives and governing principles appear to be consistent with the strategic formulation of policy and governing principles described in the previous section. In particular, the 300 Project can be regarded as a strategic policy to complement the HSEP.

DISCUSSION AND POLICY RECOMMENDATIONS

As discussed above, the overall direction and governing principles of the Lee administration's educational policy are consistent with the main lines of the strategic policy and governing principles that are needed in the era of globalization and in the knowledge-based society. In order to achieve the proposed policy goals, however, the following recommendations will need to be considered.

Provide clear definitions of the purpose of educational reform and the meaning of authentic achievement. Although the Lee administration states its governing principles in terms of autonomy, accountability, choice, competition, and diversity, these are the means for implementing the educational policy, rather than the purpose of that policy. In this context, the current government should define the purpose of educational policy and the meaning of "authentic" achievement. More important, this process should be done within the "discussion" framework, which is needed in the cooperative governance model. This suggests that educational stakeholders including MEST and the city and provincial offices of education, along with schools, teachers, parents, and students, should be allowed to participate in the process. In addition, special attention should be paid to developing the capacity for autonomy; this will enable all educational stakeholders to pay constant attention to, and participate in the process of, planning and implementing policy.

Carefully select the procedures and methods for implementing education reform. The success or failure of the current administration's educational initiatives will likely rest on how they are implemented. That is, the procedures and methods that are selected will determine whether the reform increases diversity or inequality. For example, the Lee administration's recent decision to permit the establishment of international middle schools will likely increase stratification rather than promote diversity at the lower secondary level. Yet the use of affirmative action and the so-called *choiyakbowan* (최약보완 最弱補完) principle may increase diversity rather than stratification. *Choiyakbowan,* a leading principle in the *Saemaeul Movement*, is a strategy to increase the capacity of the entire society by placing a priority on support to its weakest parts.

Establish a more cooperative system to govern education. As governing authority is transferred from the central government to LOE and schools, a more cooperative system of governance will need to be established, one that helps divide up the roles of the educational authorities and coordinate the distribution of responsibilities among them. However, the Lee administration is tending to focus more on the central process of authority transfer, rather than creating such a cooperative governance system.

Increase the accountability of LOE and schools by empowering educational consumers. To ensure that both the government and the market help increase accountability, consumers of education should be empowered with information about the outcomes of educational services. Therefore, consumers should be involved in assessing LOEs, schools, and teachers. Also, the assessment results should be released to the public.

Make educational policy more effective by developing an incentive system for the actors to implement policy. To make educational policy more effective, careful attention should be paid to connecting related policies. For example, the

administration's policy for diversifying the school system must be consistent with its educational initiative to diversify the criteria for college admissions, given that secondary education is so strongly influenced by the college admissions system. Here I suggest three measures as examples of a policy implementation system that links the government's efforts to diversify the high school system to those for diversifying the criteria used in college admissions:

1. Introduce the category of "self-directed and autonomous learning" as a new path to college admissions; it would apply to those students who devote themselves to self-directed learning as well as school learning, and would provide funds to universities that select students based on this new policy
2. Establish a council involving high schools and universities to discuss this task
3. Provide financial support to high schools that operate programs in "self-directed and autonomous learning"

Pay special attention to the issue of equity. There are concerns about the overall directions and governing principles of the administration's reforms. Critics argue that the administration must be very careful as it attempts to apply market control principles to public education; otherwise its efforts to increase autonomy in school management and diversity in the system may increase educational inequality and stratification (Cho, 2008). The stratified systems of education, these critics claim, will then increase the competition to enter the top-tier schools; in turn, that will lead parents and students to seek more shadow education. These concerns and issues should not be ignored, given the presence of significant educational gaps between families of higher and lower SES (socioeconomic status). Therefore, the current Lee administration should take these issues, especially equity, into account as it makes and implements its policy decisions. Doing so will enable it to achieve a desirable balance between the issues of equity and excellence in education.

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IMPROVING EDUCATIONAL QUALITY THROUGH ENGLISH-MEDIUM INSTRUCTION IN MATHEMATICS AND SCIENCE

Ideals and Practices at Four Provincial Secondary Schools in Malaysia

Carved by the customs practiced, languages spoken, and religions professed by the many immigrant and tribal groups of Peninsular Malaysia and Northern Borneo, Malaysia aspires to become a developed country by the year 2020. In his opening address to the Malaysian Business Council in 1991, which he called "The Way Forward: Malaysia as a Fully Developed Country by the Year 2020", the previous prime minister Mahathir Mohammad argued that "quality human resources" must be developed at all levels of the national education system in order to transform Malaysia into a scientifically oriented and technologically advanced country (Ministry of Education [MoE], 2001; Macro Economic Planning Unit [MEPU], 1991, 2001a, 2001b). The English-Medium Instruction Policy of 2002, which requires mathematics and science to be taught in English at the primary and secondary levels of the national education system as of 2003, has revived public interest in mixed-medium instruction. Prior to 2003, all subject areas in vernacular primary schools were taught in either Malay, Mandarin Chinese, or Tamil in response to the aspirations of the three major language groups to preserve linguistic heritage. Meanwhile, those in provincial secondary schools were taught in Malay, the national language, to facilitate linguistic assimilation. An increasingly informed and critical Malaysian public has expressed concerns over the difficulty of re-introducing English-medium instruction because Malay was the only language of instruction for all subject areas at provincial secondary schools up to 2002 (Tan, 2005).

The micro-ethnographic study I describe in this chapter provides intimate insights into the challenges involved in re-introducing English-medium instruction for mathematics and science at four provincial secondary schools in Malaysia. Under the rubric of Vision 2020, the discourse for national education reform has shifted from expanding access to basic education to developing Malaysia into a center for educational excellence in the Southeast Asian region (MoE, 2001; MEPU, 2001a). My central research question is: What are the various challenges facing teachers and students in teaching and learning mathematics and science in English? I address several specific research questions. First, focusing on language, I ask: Are mathematics and science currently taught in English? And how do students respond to their teachers' linguistic behaviors? Second, focusing on

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instruction, I ask: Are the instructional processes currently student-centered? How do students respond to their teachers' teaching practices? I end by considering the implications for policy implementation that can be drawn from this empirical investigation.

To answer these questions, I conducted systematic data analyses of my verbatim field notes taken during classroom observations, along with topics that emerged during informal conversations, and ratings generated from student surveys. I provide in this chapter an interpretive framework developed from integrating the quantitative and qualitative content analyses of observations and conversations to deepen readers' understanding of the tensions derived from two conflicting ideals: pragmatic nationalism and linguistic heritage. I also provide two examples, extracts from my verbatim field notes, to illustrate the discrepancy between policy mandates and classroom practices. Transcription conventions, commonly used in corpus (speech) analyses, are used to characterize the sociolinguistic behaviors and paralinguistic features of teachers and students.

ETHICS IN FIELDWORK

As a constitutional monarchy with a parliamentary democracy, Malaysia has limited civil liberties and a mixed record on human rights (Amnesty International, 2011; U.S. Department of State, 2009). Two laws are especially relevant to researchers because of their ties to the freedom of expression: (1) the Sedition Act of 1969, which discourages researchers from inquiring into issues with seditious tendency, especially language, race, and religion; and (2) the Official Secrets Act of 1972, which forbids researchers from accessing documents classified as official secrets. Researchers who are found guilty can be charged with espionage and detained without trial. Adopted from the United Kingdom during a period (1948 to 1960) when the judicial process was inadequate to prevent organized crimes and terrorist activities, both acts are still in effect, even though no state of emergency exists (Global Campaign for Free Expression, 2004; Malaysian Human Rights Organization, 1998).

As an "ethnic ethnographer" (insider ethnographer), I have the *emic* perspective to understand both the risks and the hurdles brought on by the above acts (Foley, Levinson, & Hurtig, 1999). By "risk", I refer to the possibility of being charged with espionage; by "hurdle", I refer to the alienation prevalent among informants. To ensure that my fieldwork would be legitimate, I submitted my research proposal to the Research Promotion and Coordination Committee of the Macro Economic Planning Unit (MEPU) for review. Having obtained official field access, I conducted cyclical, micro-ethnographic fieldwork in two provincial towns, called Swamp and Cat, in East (Northern Borneo) and West (Peninsular Malaysia) Malaysia for one academic year, from August 2005 to August 2006. I chose these towns because non-Malays are the majority (70%) of the student population. This also meant that the national ideology of linguistic assimilation was more likely to be contested by local support for linguistic pluralism (Heller, 1999). Marginalized by the Malay-Medium Instruction Policy, non-Malay communities in these towns

Table 1. Demographics of students, teachers, and administrators at each school

Schools	*Ethnicity*					*Total*
	Malay	*Chinese*	*Indian*	*Eurasian*	*Aboriginal*	
School 1						
Administrators	0	5	0	0	0	5
Teachers	0	80	0	0	1	81
Students	11	1263	0	0	18	1292
School 2						
Administrators	2	3	0	0	0	5
Teachers	42	22	15	1	0	80
Students	350	531	205	9	2	1097
School 3						
Administrators	0	5	0	0	0	5
Teachers	17	58	0	0	5	80
Students	61	1667	5	1	69	1803
School 4						
Administrators	2	2	0	0	0	4
Teachers	30	57	15	1	0	103
Students	341	1371	91	25	0	1828

are known for their support for mixed-medium instruction. Table 1 summarizes the demographics of the four provincial secondary schools I selected for this study. The teachers and students of this study mostly come from three language groups: Malay, Mandarin Chinese, and Tamil, with a few English speakers. While English is the second language (L2) of Malay-speaking teachers and students, it is the third language (L3) of Chinese and Tamil speakers. At each school site, I consulted the head teachers of the mathematics and science departments, asking them to recommend potential teachers for observation. To ensure that I would be able to observe both "strong" (high English proficiency) and "weak" (low English proficiency) teachers, the head teachers tended to recommend two teachers for each subject area. Having obtained the consent of teachers who were willing to participate in my study, I photocopied their teaching schedules, constructed an observation schedule, and wrote them a letter to express my gratitude for their support. After conducting classroom observations, I wrote another letter summarizing the classes observed and again thanking the teachers for their cooperation. I observed each subject area twice a week, spending 75 to 110 minutes on each observation and made verbatim notes about the instructional processes.

By situating myself in various places in the classrooms, I was able to hear the languages the students used among themselves or with the teachers. Based on the "accommodation theory" (Holmes, 2001), I captured the linguistic behaviors of students and teachers as they accommodated to each other's speech styles by converging upward or downward. Although teachers were urged to develop the communicative competence of their students through the standard variety of English (American or British English), the local variety of English (Chinglish or Manglish) prevailed because neither teachers nor students had adequate command

of Standard English. Moreover, although teachers were required to explore subject matters with students through scientific inquiry, I observed that rote memorization prevailed because of the pressure to excel on high-stakes standardized tests.

In contrast to researchers who present themselves as experts, I presented myself as the naïve stranger who was keen to learn the challenges that teachers and students face in teaching and learning mathematics and science in English. As I sought insights from local scholars and practitioners, faculty members at local universities told me that few empirical studies are conducted on instructional processes because teachers are reluctant to cooperate. On the other hand, teacher educators at teacher training colleges argued that researchers are reluctant to spend time with teachers to develop rapport with them. In response, I took pains to develop rapport with both students and teachers and to ensure them that their identities would remain confidential in my report.

The teachers (N=27) who participated in this study vary in their linguistic heritages and training backgrounds. While English is the second language (L2) of Malay teachers, it is the third language (L3) of Chinese, Indian, and Aboriginal teachers. Three teachers were graduates of local teacher training colleges; the rest were graduates of local universities. As I gained their trust, I conversed with them during class recesses or at lunch breaks to better understand the challenges they face in teaching mathematics and science in English. Teachers who went through pre-service training in Malay, also known as Malay-trained (MT) teachers, are frustrated by the English-Medium Instruction Policy more easily than those who were trained in English (ET). In tandem with the implementation of the Malay-Medium Instruction Policy in provincial secondary schools, teacher training colleges in Malaysia were required to convert their language of instruction from English into Malay by 1976 in West Malaysia and by 1986 in East Malaysia.

To gain different perspectives on the effects that English-medium instruction and the student-centered approach have on the educational experience of students, I distributed surveys (N=597) to both science-stream/college-track and arts-stream/ vocational-track students at the grade 10 level. While the curriculum of the science stream/college track focuses on cultivating the reasoning skills of students through advanced education in mathematics and science, the curriculum of the arts stream/vocational track focuses on developing the vocational skills of students through clerical training. Over time, as I developed rapport with students, I conversed with them in groups or individually. In order to excel in college entrance exams, science-stream students tend to drill for exams after school through lessons with private tutors or at tutoring schools. In Malaysia, many tutors are retired teachers who were trained in English before the language of instruction in colleges and universities was converted from English into Malay. They are seen as competent teachers because they are more likely to speak Standard English. In contrast, teachers are more likely to speak local English and mispronounce scientific terms because they are trained in Malay. The negative labeling of teachers is also related to the Ethnic Quota System Policy, which was implemented shortly after the May 13 1969 Race Riots to re-distribute opportunities in education and employment. As an unintended consequence of the above policy, Malay

teachers of provincial secondary schools are stereotyped by the public as the bottom 10% of high school graduates who get to enter and study at local colleges or universities because of their ethnicity.

Before conducting field work at the provincial secondary schools selected for this study, I visited the principals, ensuring them that I would follow the ethnical guidelines stipulated in my research permit. Three out of the four principals included in this study were experienced teachers trained at the Malaysian Education Staff Training Institute. In addition to carrying out daily administrative duties and conducting annual ceremonial events, they were required to guard access to evaluation records and examination results. To gain access to that information, as well as to circulars and memos that contain policy mandates and instruction guidelines, I explained to the principals that I would use these items only as background information.

SUMMARY OF ANALYSES

By using the NUD*IST (Non-numerical Unstructured Data Indexing, Searching and Theorizing) software, I reduced the non-numerical data, which I had transformed from the verbatim notes taken during my classroom observations (N=257) and informal conversations (N=55) into a hierarchical classification system for "constant comparison method analyses" (Glaser & Strauss, 1967) and metrically defined units for "quantitative content analyses" (Reinharz, 1992). The former analyses enabled me to lift relevant information from the great mass of data while the latter enabled me to identify the patterns embedded in the data. Figure 1 approximates the coding categories that emerged as I used the constant comparison method to analyze the qualitative data transformed from classroom observations. I compared incidents that applied to each category, subsumed specific categories under general ones and linked all the categories in a hierarchical fashion to reflect the relationships between them. Tables 2, 3, 4, and 5 encapsulate the quantitative content analyses of the 17,080 text units that I chunked out from the verbatim notes using the NUD*IST software. The high quality of the software enabled me to cross-tabulate instances of teachers' linguistic behaviors and teaching practices with their training backgrounds in order to identify how frequently they engaged in language alternation behaviors and used teacher-centered approaches.

At the same time, I conducted independent samples t-tests and correlation analyses on the numerical dataset transformed from student surveys (N=597) by using the SPSS (Statistical Package for Social Science) software. Grade 10 students of all four schools in this study were asked to rate on a 1 to 5 Likert Scale (1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree) if they agreed or disagreed with statements grouped under three categories (academic performance, classroom instruction, and school management). To ensure validity, I constructed the survey questionnaires based on the concerns raised by students and teachers in informal conversations. To ensure reliability, I distributed the surveys to students whom I actually observed. Independent samples t-tests and correlation analyses are appropriate for this study because I was able to cross-tabulate

students' ratings with their achievement levels (high achieving/science-stream, low achieving/arts-stream) and the number of subjects in which they were being tutored: high-tutoring means five and more, while low-tutoring means four and fewer. Tables 6, 7, 8, and 9 summarize the statements that were tested for statistical significance.

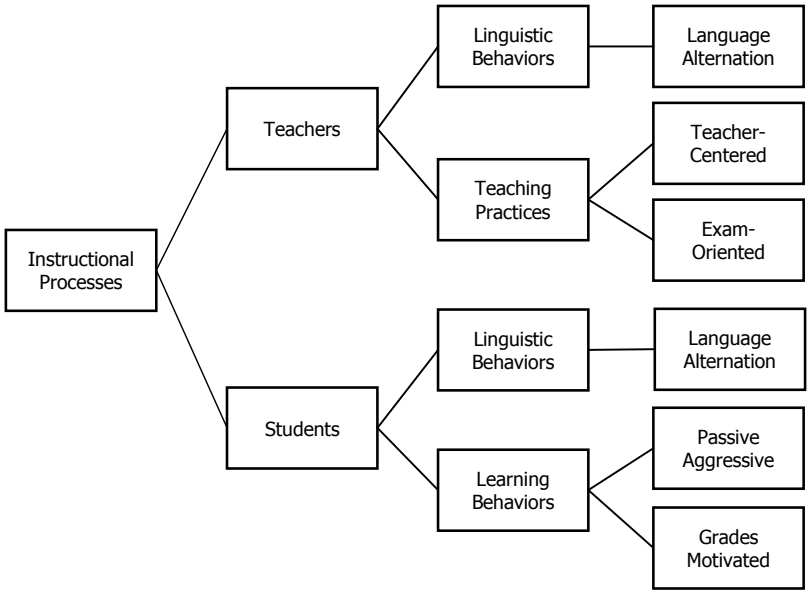

Figure 1. Classification categories emerging from classroom observations.

Findings for Research Questions on Language

The first two research questions were: Are mathematics and science currently taught in English? How do students respond to their teachers' linguistic behaviors?

While teachers and students are required to teach and learn mathematics and science in English, it is also understood that they will progress through a series of stages before they demonstrate full proficiency in the target language (Curriculum Development Center, 2004). By using the NUD*IST software, I conducted quantitative content analyses of the coding categories that emerged from my verbatim notes. Results of my analyses show that both teachers and students are equally likely to engage in language alternation (code-mixing or code-switching) because of their varying degrees of English proficiency (receptive and productive skills). Teachers, especially those who were trained in Malay during their pre-service training, are more likely to mix Malay (L1) or Chinese (L2) into their speech in English (their L2 or L3) and/or to alternate between the languages to compensate for their low English proficiency. In response, students accommodate to their teachers' sociolinguistic behaviors when they ask or answer questions. The

NUD*IST software enabled me to examine the verbatim notes phrase by phrase, so I could identify and summarize instances of code-mixing (CM) and/or code-switching (CS) behaviors. I show these in Tables 2 and 3.

The data in Table 2 show that Malay-trained teachers (MT) are more likely than English-trained teachers (ET) to mix L1 into their L2 or to alternate between the two languages to facilitate the instructional processes. I coded 629 text units into one of the four categories of referential functions: 338 were coded as "explain complex concepts", 163 as "organize learning activities", 78 as "elicit students' responses", and 50 as "introduce new topics".

Table 2. Frequencies of teachers' language alternation behaviors, by referential function and by training background

Referential function / *Training background*	*Introduce new topics*		*Elicit student responses*		*Explain complex concepts*		*Organize learning activities*	
	ET	MT	ET	MT	ET	MT	ET	MT
Advanced mathematics	0	5	0	13	0	43	4	4
Modern mathematics	0	12	0	26	0	33	2	12
Biology	0	36	3	16	5	147	0	46
Chemistry	11	3	2	19	9	20	53	48
Physics	50	0	15	0	21	0	0	0
Science	0	1	1	22	20	54	6	14
English for science & technology	0	0	0	0	7	29	0	0

Table 3. Frequencies of students' language alternation behaviors, by teacher training background and by subject area

Language alternation / *Training backgrounds*	*Code mixing*		*Code switching*	
	ET	MT	ET	MT
Advanced mathematics	1	1	2	6
Modern mathematics	0	4	1	29
Biology	0	16	0	11
Chemistry	3	0	1	6
Physics	0	1	0	0
Science	2	4	3	24
English for science & technology	0	2	24	4

I also compared the students taught by MT and ET teachers. As Table 3 shows, students are more likely to engage in code-mixing or code-switching behaviors in classes taught by MT teachers (107 text units), compared to those taught by ET teachers (37 text units).

Findings for Research Questions on Teaching Practices

The second two research questions were: Are the instructional processes currently student-centered? How do students respond to their teachers' teaching practices?

Although teachers are expected to incorporate "scientific inquiry" and "exploratory exchange" into their instructional processes to produce high-level learning among their students, they also face the demand to prepare them for high-stakes test results (Curriculum Development Center, 2004). This combination of demands results in a teacher-centered and exam-oriented teaching approach.

I conducted quantitative content analyses of my verbatim notes from classroom observations. The results of my analyses reveal that teachers remain the center of the instructional processes, disseminating subject matters through lectures or handouts and assessing learning outcomes through quizzes or tests, rather than encouraging students to work in groups or engage in extended conversations. As Table 4 shows, 622 text units were coded as "ask questions to evaluate learning progress", 184 as "draw diagrams to explain difficult concepts", and 180 as "provide real-life examples". In addition, I coded 172 text units as "alert students to the questioning style of standardized tests".

Table 4. Frequencies of teachers' teaching practices, by training background

Teaching behavior / *Training background*	*Draw diagrams to explain concepts.*		*Provide real-life examples.*		*Ask questions to evaluate learning outcomes.*		*Alert students to the questioning style and grading criteria of standardized tests.*	
	ET	MT	ET	MT	ET	MT	ET	MT
Advanced mathematics	44	0	2	0	65	55	2	6
Modern mathematics	26	17	3	0	82	78	30	7
Biology	9	23	20	0	46	47	20	25
Chemistry	1	12	0	0	43	41	18	7
Physics	29	3	63	0	37	5	11	4
Science	4	15	46	31	40	31	16	0
English for science & technology	1	0	0	15	37	15	8	18

I also analyzed the extent to which students accommodate to their teachers' teaching practices. As Table 5 shows, I found that they tended to ask and answer questions at their desks (285 text units) rather than exploring ideas and exchanging insights.

Table 5. Frequencies of students' learning behaviors, by teachers' training background

Learning behavior / *Training background*	*Ask questions.*		*Answer questions.*		*Negotiate assignments.*	
	ET	MT	ET	MT	ET	MT
Advanced mathematics	15	3	26	12	3	0
Modern mathematics	4	21	31	11	6	4
Biology	28	18	19	9	3	0
Chemistry	8	5	12	8	0	0
Physics	1	1	26	1	0	0
Science	10	15	13	27	0	0
English for science & technology	4	8	17	31	0	4

Although it may not capture all the subtleties of the instructional process, Figure 2 shows some of the sociolinguistic complexity contained within mathematics and science classrooms in provincial secondary schools in Malaysia.

Since the implementation of the English-Medium Instruction Policy, English is no longer taught in isolation as a language arts subject, but in combination with the content of mathematics and science to support pragmatic patriotism. Because both teachers and students have low English proficiency, they use language alternation (code-mixing and code-switching) to facilitate the instructional processes. In addition, because they feel pressure from principals to raise test scores and thus school prestige, teachers fail to construct knowledge with students. Instead, they encourage students to regurgitate knowledge memorizing facts and figures for exams. As a consequence, the instructional process is exam-oriented and teacher-centered rather than exploratory-based and student-centered.

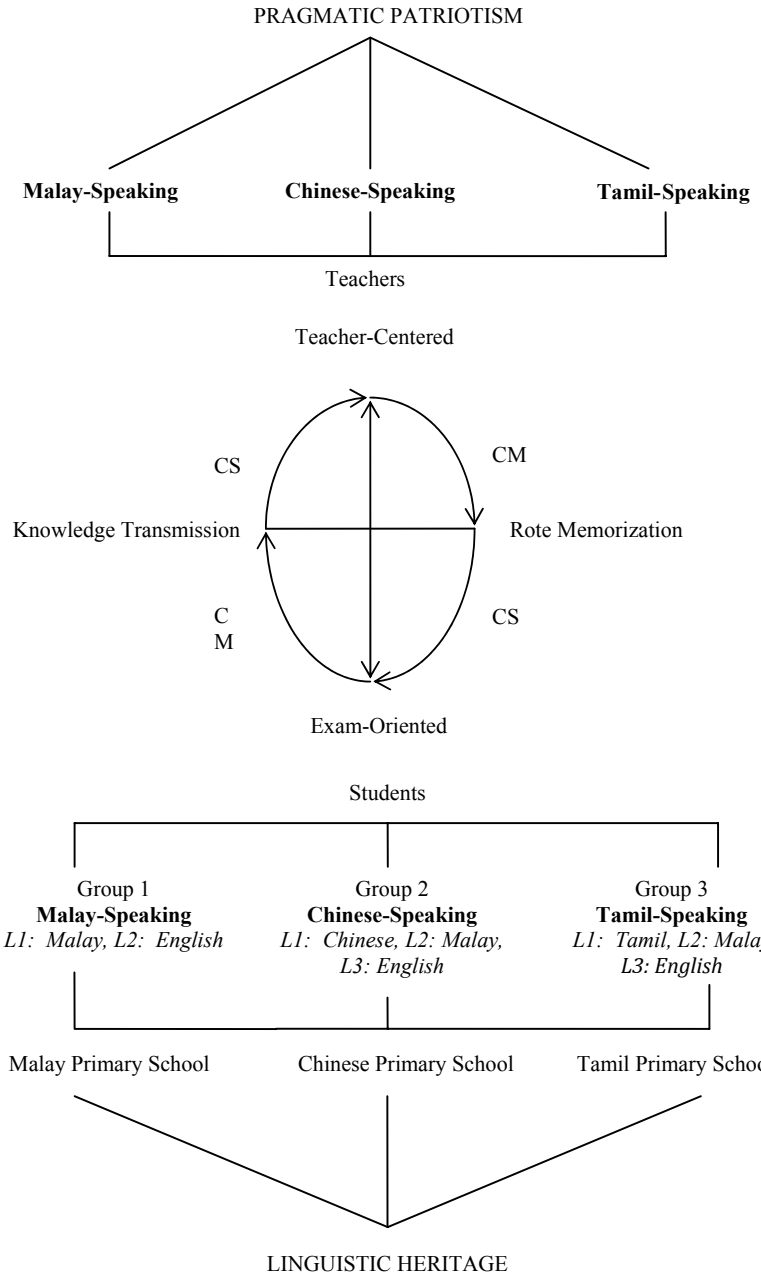

Figure 2. Sociolinguistic complexity of mathematics and science classrooms in provincial secondary schools in Malaysia

Examples of instructional processes, from classroom observations

The examples that follow were extracted from the verbatim field notes I took during a biology class and formatted according to transcription conventions. They illustrate the challenges involved in implementing English-medium instruction in these mathematics and science classrooms. Note that Malay utterances are indicated in bold and are translated into English in slashes / /. Words inserted for explanatory purposes are indicated by parentheses ( ), and those that are unclear are marked by [uncl]. Finally, nonverbal features are indicated by double parentheses (( )).

Example 1: Utterances 1 to 17. In a tenth-grade biology class, the Malay-trained biology teacher (BT) alternated between English and Malay and mixed Malay into English in order to help students become familiar with the grading criteria of standardized tests (utterances 14 to 17). Students (ST) interrupted the instructional process by asking irrelevant questions (utterances 5 to 13). Feeling bored, one male student made a joke about the x chromosomes. Other boys echoed him by laughing out loud (utterances 1 to 4).

1 BT: Okay, let's check your answers. Just now, I checked your answers, many of you don't know (them). Okay, figure one. Okay, "A", **hanya/**only/ nuclear membrane, (the) answer is?

2 ST: **Cikgu, "B" apa-ugh? Siapa-ugh?**/ Teacher, what is B about? Who is it?/

3 BT: In case I made a mistake, I gave you the mark. I know my voice (is broken), **Suara Pecah-ugh?/**Broken voice?/ Actually the answer is a controlled substance.

4 ST: **X store Cha Kuei Diau!/**X store has fried flat rice noodle!/

5 BT: Male energy means?

6 ST: To move-lah!

7 ST: Hey, shut up-lah!

8 ST: **Cikgu, ada pakai sirup-ugh?/**Teacher, did you take any cough drops?/

9 BT: **Ada. Selepas saya pakai sirup, saya makan ais kream**/I did, but after I took the cough drops, I ate ice cream/. Now can you see the picture? The **Titik-titik** /dots/ is (are) plasma membrane.

10 ST: **Cikgu punya kesalahan gambar itu!/**It is the teacher's fault that the picture is incorrect!/

11 ST: The answer is the red mosome, red-mosome … [uncl].

12 BT: "E: elaborate the differences between animal and plant cells. Q is small in animal cells. Q is large in plant cells". Okay last question, (what are) the functions?

13 ST: Nothing happened.

14 BT: Sh! Sh! The cell … [uncl]. Okay question 2, figure 2 shows? "Name all four systems. "D: respiratory system". **Na, I-dah tukarkan you punya kemarkahaan**/I have already changed your grades/. **Dan saya tukar dua di atas, dua di bawah**/I have also changed two above and two below/

15 ST: You **tipu**!/You are a liar!/

16 ST: **Cikgu**/Teacher/ muscle is an organ?

17 BT: Okay, circulatory system. You **ada nampak** kidney **di** circulatory system?/Did you see kidney in the circulatory system?/ You **dah nampak di gambar, tetapi tak ada**!/You have seen the picture, haven't you?/ **Sebab dia circulatory system hanya bagi water sahaja**/Because the circulatory system only provides water/.

Example 2: Utterances 18 to 45. The students (ST) became restless around noon as the temperature rose. As the teacher (BT) dictated the answers for the quizzes, the students chatted with each other or asked for empathy grades (utterances 18 to 26). After a short break, they continued to disrupt the classroom order by asking for earlier dismissal or for empathy grades (utterances 27 to 32). Although she seemed to be embarrassed by her students' corrections, the teacher continued to lecture as if she had not mispronounced the words "features" and "large". Lacking intellectual curiosity, students bargained for empathy grades in order to raise their test scores (utterances 33 to 44). As the teacher continued to dictate the answers to the quizzes, she converted Malay grammar into that of English by repeating "answer" twice to indicate that it was a plural noun (utterance 39). One male student fell out of his chair because he had been sleeping since the class began (utterance 45).

18 BT: Okay, **Bahagian D/**Section D/.

19 BT: Okay respiratory system and … [uncl]. Okay the last question … [uncl]. Shh! Listen! Now listen to me and write down the answer: "Respiratory system allows the oxygen to move into the lung (lungs) and to move into capillaries. The circulatory system will then carry oxygen to other parts of the body". Question 3: figure 7 shows the figure that… [uncl]

20 ST: **Cikgu, kalau protein**?/Teacher, what about protein?/

21 ST: **Kedua-dua pun protein**/Both of them are protein/.

22 ST: **Markah kasihan**!/Empathy grades!/

23 BT: **Kalau** your answers like that, I cannot give you marks **sebab** plasma membrane is semi-…[uncl] /If your answers look like that, I cannot give you the points because plasma membrane is semi--…[uncl]/

24 **Kalau plasma membrane is semi-**…**dia akan subjeck** …yang… [uncl]/If plasma membrane is semi-… it is a subject that is…/

25 Now you listen to me! The functioning (function) of "p" is to allow small unchanged molecules, i.e. uncharged molecules such as … [uncl]. Now you must remember: **Bahan yang melaluinya**/the thing that passes through it is … [uncl]/

26 Okay, **kita akan** rest for five minutes **dan kita** continue **sebab** I **nak** check/Okay, we will rest for five minutes and we will continue because I would like to check for the mistakes made in grading the monthly tests/.

27 BT: **Oka** [uncl] **y Kelas, kita** continue/Okay class, we will continue/

28 ST: **Selepas discussion, kita boleh balik rumah?**/Can we go home after the discussion?/

29 BT: Okay, what is the function of "p"?

30 ST: **Cikgu! Cikgu! Satu markah bagi sini**/Teacher! Teacher! One point for this/.

31 BT: **Mana? Nanti. Saya belum sampai sana!**/Where? Can you hold it? I haven't reached there yet!/

32 BT: **Asman, tulis! Buka kedai kopi di belakang-kah?**/Asman, write down the answers! Are you setting up a coffee shop at the back?/

33 BT: … this future … [uncl].

34 ST: F-e-a-t-u-r-e!

35 BT: Feature.

36 ST: **Future itu masa depan**!/Future means in the coming days or years!/

37 BT: … [uncl] plasma **membrane itu you tak boleh jawab carrier protein** … [uncl] or **carbohydrate by simple diffusion**…/… you cannot answer the question about plasma membrane by saying carrier protein … [uncl] or carbohydrate by simple diffusion…/

38 ST: **Cikgu**/Teacher/, simple diffusion?

39 BT: Simple diffusion! Okay, **answer answer bagi** question five very long! **Dia panjang sangat**/Okay, the answer for question five is very long!/ Okay, number four … Okay I give you **keperluangan**/opportunity/now! **Kenapa plasma membrane membawah**…/Why is plasma membrane carrying …?/

40 ST: **Tenaga**/Energy./

41 BT: **Kenapa Tenaga!**/Why energy?/ You must **ingat**/remember/plasma membrane … Okay, **masa satu lagi di Inggeris**/Okay, I will explain it again in English/.

42 Okay, continue … it allows only for hydro-phobic molecules and uncharged molecules to pass through it. As a result, external structure such as protein are (is) required to transfer extension ((mispronounced essential as extension)) large … **rarge** (large) … [uncl]

43 ST: L-a-r-g-e. Large what?

44 BT: **Molecule-lah!** Actually, **kalau** you **jawab di cara yang lain, saya terima, tetapi you tulis sebiji-biji**…**kalau ada maksud, saya terima**/Molecule of course! Actually, I accept different ways of responding to the question as long as they are correct. However, you answered it in such a way that you have clusters of English. As long as it has meanings, I accept it/

45 Naan, are you okay?

Two stereotypes emerged from my informal conversations with students and teachers. First, teachers who are unable to speak Standard English and pronounce academic terms are stereotyped as incompetent. Second, students who are unable to enter the science stream and become college-track students are stereotyped as bad students. During the course of my fieldwork, I continually heard both students and teachers make such comments as "teachers are incompetent because they speak local English and mispronounce terms" and "arts-stream students can only deal with basic subjects in national exams". To determine the possible truth of these stereotypes, I tested student comments using both independent samples t-tests and correlation analyses. The results of my analyses show that the more tutoring students received, in either academic stream, the more critical they were of their mathematics and science teachers. And, although students were critical of their teachers, they agreed that mathematics and science should be taught in English.

I conducted independent samples t-tests and correlation analyses on the 69 statements in the category of classroom instruction to determine if they were statistically significant. As Table 6 shows, 11 of those statements were statistically significant. Overall, science-stream students appear to hold higher opinions of their mathematics and science teachers than do those in the arts stream. They agree with statements 1 through 7: that teachers are competent, serious, flexible, patient, and encouraging of questions. And they agree strongly with statement 8: that their mathematics and science teachers welcome corrections. Despite their complaints about teachers' broken English and mispronunciation of terms, science-stream students agree strongly with statement 9: that mathematics should be taught in English.

Table 7 profiles the 25 statements that were determined to be statistically significant, and correlates students' ratings of classroom instruction and the numbers of subjects in which they were tutored. The more tutoring students received, the more they agreed that mathematics and science should be taught in English, and the more critical they were of their mathematics and science teachers.

I also conducted independent samples t-tests for the 15 statements in the category of school management, relating to discipline, administrators, counselors, and staff. Table 8 profiles the four statements that were tested as statistically significant. Students in the science stream tended to agree with the statements because they are more likely to be placed in better-equipped classrooms, taught by more qualified teachers and counseled about their career choices. On the other hand, arts-stream students tended to disagree with these statements because they are more likely to feel that administrators are less responsive to their needs and counselors are less helpful in exploring career choices.

Table 6. Independent samples t-tests for beliefs about classroom instruction by academic stream

Statement about classroom instruction	*Academic stream*	*Mean*	*Std dev.*	*T*	*Df*	*Sig (2-tailed)*
1. Your mathematics teacher is competent and trained.	Science	3.7340	1.1537	3.306	592	.001
	Arts	3.3906	1.3689			
2. Your English teacher is competent and trained.	Science	4.1447	1.0918	2.707	212	.007
	Arts	3.7101	1.1412			
3. Your mathematics teacher has high expectations of you.	Science	3.8446	1.0166	6.033	590	.000
	Arts	3.2703	1.2840			
4. Your mathematics teacher is serious in his or her teaching.	Science	3.8576	1.1127	4.568	587	.000
	Arts	3.3810	1.4037			
5. Your English teacher adapts his or her teaching approaches to reflect different learning styles.	Science	3.8933	1.1806	2.094	209	.037
	Arts	3.5368	1.1858			
6. Your mathematics teacher is patient with slow learners.	Science	3.7637	1.2109	4.535	585	.000
	Arts	3.2576	1.4782			
7. Your mathematics teacher encourages questions and answers during the teaching-learning process.	Science	3.7288	1.1842	2.114	588	.035
	Arts	3.5085	1.3423			
8. Your mathematics teacher welcomes your correction of his or her mistakes during the teaching-learning process.	Science	4.0983	1.0565	5.620	588	.000
	Arts	3.5220	1.4089			
9. Mathematics should be taught and learned in English.	Science	4.408	.9380	11.396	590	.000
	Arts	3.1757	1.6081			
10. Your mathematics teacher explains important concepts through a mix of English and native language.	Science	2.4009	1.0363	-5.974	378	.000
	Arts	3.0949	1.2197			
11. Your science teacher explains important concepts through a mix of English and native language.	Science	2.0784	.9766	-2.024	200	.044
	Arts	2.4834	1.3107			

Table 7. Correlation analyses for comments on classroom instruction and number of subjects for tutoring

Comment on classroom instruction	*N*	*r*	*Std. Error*	*T*	*Sig.*
1. Your mathematics teacher is competent and trained.	533	-.169	.072	-2.316	.021
2. Your biology teacher is competent and trained.	276	.159	.062	2.533	.011
3. Your chemistry teacher is competent and trained.	278	.189	.058	3.226	.001
4. Your physics teacher is competent and trained.	281	.170	.065	2.615	.009
5. Your mathematics teacher has high expectations of you.	531	-.105	.053	-1.968	.049
6. Your biology teacher has high expectations of you.	276	.179	.069	2.584	.010
7. Your chemistry teacher has high expectations of you.	279	.165	.067	2.452	.014
8. Your physics teacher has high expectations of you.	281	.178	.067	2.611	.009
9. Your chemistry teacher is serious.	277	.165	.060	2.754	.006
10. Your chemistry teacher adapts his or her teaching approaches to reflect different learning styles.	277	.284	.060	4.631	.000
11. Your mathematics teacher is patient.	526	-.119	.047	-2.506	.012
12. Your chemistry teacher is patient.	277	.282	.059	4.687	.000
13. Your physics teacher is patient.	279	.126	.063	1.997	.046
14. Your biology teacher knows your strengths and limitations.	271	.145	.068	2.129	.033
15. Your chemistry teacher knows your strengths and limitations.	277	.188	.064	2.912	.004
16. Your biology teacher encourages questions and answers.	273	.137	.066	2.066	.039
17. Your chemistry teacher encourages questions and answers.	279	.160	.061	2.609	.009

18. Your physics teacher encourages questions and answers.	280	.240	.063	3.757	.000
19. Your mathematics teacher welcomes correction of his or her mistakes.	279	-.172	.047	-3.633	.000
20. Your chemistry teacher welcomes correction of his or her mistakes.	279	.156	.067	2.312	.021
21. Additional mathematics should be taught and learned in English.	281	-.306	.072	-4.092	.000
22. Mathematics should be taught and learned in English.	531	-.443	.042	-10.354	.000
23. Biology should be taught and learned in English.	276	-.339	.066	-5.023	.000
24. Chemistry should be taught and learned in English.	281	-.336	.064	-5.162	.000
25. Physics should be taught and learned in English.	279	-.357	.063	-5.463	.000

Table 8. Independent samples t-tests for student opinions of school management, by academic stream

Statement about school management	*Academic stream*	*Mean*	*Std dev.*	*T*	*Df*	*Sig (2-tailed)*
1. Your school is clear and firm about rewards and punishments.	Science	3.6174	1.3006	3.541	588	.000
	Arts	3.2021	1.5411			
2. Your school has responsive administrators.	Science	3.0949	1.1419	3.337	588	.001
	Arts	2.7797	1.1528			
3. Your school has helpful student counselors.	Science	3.5657	1.0315	2.836	591	.005
	Arts	3.3142	1.1256			
4. Your school has efficient staff.	Science	3.1424	1.1429	2.926	588	.004
	Arts	2.8712	1.1083			

Finally, I conducted correlation analyses for the relationship between students' ratings of school management and the numbers of subjects in which they receive tutoring. Table 9 profiles the 8 statements that were tested as statistically significant; they relate to aspects such as school cleanliness, efficiency, support, and staff and teacher responsiveness. Overall, I found that the more tutoring students receive, the more critical they are of the administrators.

Table 9. Correlation analyses of the relationship between students' opinions of school management and amount of tutoring received

Statements on school management	*N*	*R*	*Std. Error*	*T*	*Sig.*
1. Your school is clean and ordered.	533	.270	.052	5.238	.000
2. Your school is financially supportive to poor students.	529	.234	.048	4.915	.000
3. Your school monitors and evaluates teaching performance.	529	.171	.048	3.555	.000
4. Your school monitors and evaluates extra-curricular activities.	529	.188	.054	3.510	.000
5. Your school teaches the knowledge and skills required by potential employers.	527	.182	.046	3.924	.000
6. Your school has appropriate facilities and equipment.	533	.194	.051	3.808	.000
7. Your school has responsive administrators.	529	-.224	.051	-4.457	.000
8. Your school has efficient staff.	529	-.188	.051	-3.697	.000

In summary, the negative labeling of arts-stream (vocational-track) students as "bad" students reflects the overall shortage of higher education opportunities. Academically oriented (science-stream) students, especially those not of Malay lineage, are seen as good students; the public generally holds that they must work much harder than the Malays in order to excel in college entrance exams and enter engineering, law, or medical schools (Kua, 1990; Malaysian Human Rights Organization, 1998). Additionally, science-stream students are more likely to obey discipline rules and to be praised as good students because they are taught by qualified teachers and counseled about their career choices. On the other hand, arts-stream students are more likely to defy discipline rules and be denounced as bad students because they are frustrated by uncaring school staff and teachers who are not qualified to teach in their subject areas.

IMPLICATIONS

Is it realistic to expect mathematics and science teachers to teach their subject areas in Standard English? The deteriorating English proficiency of Malaysian teachers coincides with the rise of Malay nationalism. Shortly after the May 1969 Race Riots, the secondary and tertiary levels of the national education system were required to begin using Malay as the only language of instruction in order to expand higher education opportunities for the Malays. Although integrating language objectives with academic objectives in lesson plans does help teachers learn English in a meaningful context, it may be more valuable to teach international phonetics and grammatical rules during language partner workshops to help teachers improve their intelligibility. Concurrently, long-term initiatives (employment requirements, mass communication) may help deepen teachers' English immersion in addition to short-term initiatives like merit pay and course software.

Second, is it reasonable to label arts-stream students as weak or even bad students? Students in Malaysia, like those in Hong Kong and Singapore, are tracked into science-stream/high achievers or arts-stream/low achievers by their proficiency level in the second language (Lin, 1996; Rubdy, 2005). Pressured to maintain their linguistic heritage on one hand and to increase their children's educational opportunity on the other, non-Malay lineage parents send their sons and daughters first to Chinese- or Tamil-medium primary schools and then to Malay-medium secondary schools. In the belief that cognitive competence acquired in one language can be transferred into another, non-Malay students are urged to drill for standardized tests rather than develop intellectual curiosity. In reality, however, it takes up to nine years to reach the native proficiency level that is required to excel in college entrance exams (Brinton, Snow, & Wesche, 1989; Swain & Carroll, 1987).

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THE DEVELOPMENT OF HIGHER EDUCATION, AND ITS QUALITY ASSURANCE, IN VIETNAM

COUNTRY PROFILE

Recent History

Vietnam is situated on the eastern portion of the Indochinese Peninsula, sharing borders with China to the north, and Laos and Cambodia to the west. Occupying an area of 330,000 square kilometers, the country is well endowed with natural resources, sizable forests, reserves of coal and petroleum, and hydroelectric potential. Vietnam has a population of approximately 87 million as of 2010; 70% of those people live in rural areas. The population growth rate is about 1.3% per annum. It has 54 ethnic groups but about 87% of the total population of Vietnam are ethnic Vietnamese (Kinh) and the Vietnamese language is the state language. The more commonly used foreign languages are English, French, Chinese, and Russian.

The 30-year war, which ended in 1975, caused great difficulties for Vietnam. After reunification in 1975, Vietnam first pursued development as a centralized planned economy. The country was in the worst stage of its socioeconomic crisis: production stood still, inflation was skyrocketing, the country was in an economic blockade, and people's lives were extremely hard. The American embargo exacerbated these difficulties. After it was lifted, Vietnam's relationship with the United States was normalized in 1995.

In 1986 the government adopted a policy of transition from the centralized planned economy to the market economy, known as *doi moi* or renovation. After two decades of persistent efforts to implement the renewal policy, Vietnam achieved very important successes in the realms of socioeconomic development, politics, and internal and external relations. Some important milestones in its international relations include the signing of the bilateral trade agreement with the United States in late 2001 and its official membership in the World Trade Organization, as of early 2007.

Together with its commitment to a market economy and international integration, Vietnam's economy has gradually recovered and improved. After more than two decades of innovation, especially in the most recent decade, Vietnam's economy has undergone dramatic changes, which can be seen in Table 1.

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 125–142.

Table 1. Growth in Vietnam's GDP per capita, 2001–2010, in $US

Year	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*	*2008*	*2010*
GDP/ capita	413	440	492	553	639	723	834	1034	1200

Source: General Statistics Office (2009)

Despite its relatively rapid growth, Vietnam remains among the poor countries, with a per capita income estimate of approximately US $1,200 in 2010. In addition to its economic growth, it has developed some infrastructure. In the field of communications, for instance, approximately 94% of the population had telephones as of 2008 and the number of Internet users is rising quickly.

The national development plan describes ambitious goals for industrialization and modernization. It aims to turn Vietnam into an industrialized country with a modern material and technical base, appropriate economic structures, a developed and productive work force, a healthy material and spiritual life, and a strong national defense and security. Vietnam's common national aim is a rich people, a strong country, and a democratic, equitable, and civilized society.

National Education System

According to the Education Law, which was passed in 1998 and amended in 2005 and 2009, the national education system of Vietnam consists of four sub-systems: preschool, general, and vocational-professional, and higher education, with the structure 5-4-3-4 (Thiep, 2004).

The system of preschool education nurtures, cares for, and educates children between 3 months and 6 years of age. General education consists of three parts. Primary education is compulsory for all children between 6 and 14 years of age; lower secondary lasts for four years, from grade 6 to 9; and upper secondary lasts for three years, from grade 10 to 12.

Vocational-professional education consists of two parts. First, professional secondary lasts three or four years for those with a lower secondary diploma, or one to two years for those with an upper secondary diploma. Second, vocational training is available for those whose talents and health suit them for the trade they choose to learn. Short-term vocational programs can last less than one year and long-term programs can last from one to three years.

Higher education includes undergraduate education and postgraduate education, and occurs in two modes, formal and non-formal. Some important statistics about education in Vietnam, as of academic year 2006–2007, are as follows. The literacy rate, among those over age 10, is 94%. The total number of students enrolled at all levels of education is nearly 23 million. Adults (over age 15) have attended school for an average of about 9.6 years.

CURRENT STATUS OF THE HIGHER EDUCATION SYSTEM

A system of higher education (HE) was established in Vietnam in the 11th century by QuocTu Giam, but the modern HE system does not have a long history of development. Only in 1906 was the first modern university set up in Hanoi to serve the entire Indochina peninsula. Since the August Revolution of 1945, and especially after Vietnam's 1954 victory in its war of resistance against the French, the number of colleges and universities has increased vigorously in both North and South Vietnam. Since 1975 all colleges and universities in Vietnam have been united under one system. Table 2 provides statistical data for the academic year 2010–2011, to give a general overview of HE in Vietnam.

Table 2. Statistical data on higher education in Vietnam for academic year 2010–2011

Numbers of higher education institutions	
Total	386
Four-year colleges and universities	163
Junior colleges	223
Public	306
Private	80
Numbers of students	
Total	2,162,106
In 4-year colleges and universities	1,242,778
In junior colleges	476,721
Numbers of faculty members	
Total	74,573
Numbers holding a Ph. D. or Doctor of Science	7,924
Numbers holding a master's or advanced professional degree	30,374

Source: Ministry of Education and Training (2011)

As Figure 1 shows, Vietnam's system of higher education includes four main training programs that lead to degrees. We describe each in turn.

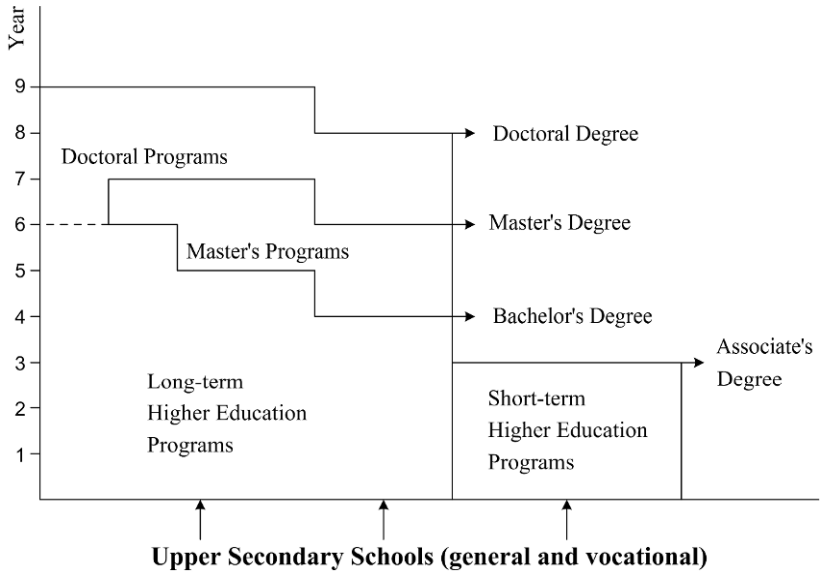

Figure 1. System of higher education degrees in Vietnam

- The long-term training program lasts 6 years for students in the medical and dental sciences, 5 years for students in industrial engineering, and 4 years for students in most other fields. Graduates of these programs are granted degrees with titles related to their specialty, such as *cu nhan* (bachelor), *ky su* (engineer), *bac sy* (medical doctor), or *luat su* (lawyer)
- The short-term training program lasts 3 years. At present, it is being conducted in junior colleges, including teachers' colleges. Some universities offer additional programs. Students who complete these short-term programs are granted a degree with the title of *cao dang* (associate degree)
- The master's program admits graduates of the long-term training programs and lasts 2 years full-time or 3 years part-time. Students finishing graduate programs are awarded a degree with the title *thac si* (master)
- The doctoral program accepts students who hold either an undergraduate degree with an excellent record or a master's degree. The most important requirement for the doctorate is defending a dissertation. Students who do so successfully are awarded a doctoral degree with the title *tien si* (equivalent to the Ph.D.) in their given specialty or profession
- In addition, an informal mode of education provides study opportunities for working people, along with continual learning and life-long learning, including programs leading to degrees through part-time and distance education

Until 1993 Vietnam did not have large multidisciplinary universities. There were only small colleges grouped according to their specializations and some comprehensive universities that offered programs in the humanities and the social and natural sciences. The single-discipline institutions, based on the Soviet model, made it harder for students to train in a wider spectrum of knowledge and for researchers to link their findings with social services in a comprehensive way.

Starting at the end of 1993, several leading institutions of higher education were established, forming the core of the overall system. The five multi-disciplinary universities are Hanoi National University, founded in December 1993; Ho Chi Minh National University, founded in January, 1995; and the universities of Hue, Danang, and Thainguyen, founded in April, 1994. The two open universities are the semi-public Open University of Ho Chi Minh City, founded in July 1993; and Hanoi Open University, founded in November 1993. In addition, several private universities and colleges were established, along with a number of community colleges.

In addition to these institutions of higher education, Vietnam has a system of research institutes that are part of either the Vietnam Academy of Science and Technology, the Vietnam Academy of Humanities and Social Sciences, or various ministries. According to the Law of Education and related regulations, many of those institutes are eligible to offer master's programs, in cooperation with institutions of higher education, and they can offer doctoral programs independently.

QUALITY ASSURANCE IN HIGHER EDUCATION IN VIETNAM

In this section we describe how quality has been seen in Vietnam's HE system, and review some current mechanisms for quality assurance (QA) and some QA activities.

Perceptions of Quality in Higher Education in Vietnam during Three Phases of Development

These perceptions have changed over time, as the focus shifted from selectivity, to resources, to standards.

Before 1985: Quality equals high selectivity. Before 1985, Vietnam's system of HE was primarily an elite one, with only 120,000 students in all the HE institutions (HEIs) in a country of over 70 million people. Quality was not an issue, as the key players in the educational scene—the students themselves—were regarded as people of outstanding caliber, carefully chosen from the start with a very high level of selectivity. It can be said that, in HE in Vietnam, quality management was long thought to be synonymous with the control of student intake through highly competitive university entrance examinations.

During this time, the method used for quality management was quality control. The quality of input was controlled by applying stringent selection standards, and

the quality of output was also controlled through examinations, as well as approval of graduation status, and certifications and credentialing. Quality control also existed in the form of the inspectorate system which monitored the key operations in the educational process. However, this inspectorate system did not seem to be highly efficient, nor did it have much impact on the system: Its focus was only on uncovering and punishing deviations from the fixed norms, in the form of established regulations, and not on understanding ways to continuously improve the system to better meet the ever-changing demands it faced.

This closed and inward-looking system, even with its outstanding students, could not fully meet the demands of society. At that time, however, Vietnam was isolated and thus relatively stable, both socially and politically, and no one felt an urgent need to change university governance. Only after the beginning of the *doi moi* policy in the mid-1980s did everything in Vietnam begin to change quickly, including tertiary education.

From 1986 to 2003: Quality equals adequate resources. The year 1986 marked the beginning of Vietnam's innovation in higher education; one important goal was to increase the capacity of Vietnam's HEIs, and thus to improve educational access for all students. To meet this goal, the two decades since 1986 have seen the implementation of various measures, resulting in exponential growth in numbers of both students and institutions (ADB, 2008; Thiep, 2004).

This growth in both scope and scale has demanded two foundational conditions. The first is a proportional increase in resources (personnel, infrastructure, and finance). The second is a new governance mechanism equipped with appropriate leadership and management competencies for this new size and volume, just to maintain—let alone consider improving—the quality of higher education (ADB, 2008; APRBE, 2003). However, in the past two decades of innovation, Vietnam's HE system seems to be focusing only on providing resources through two main sources: tuition fees from students and families, and state funding. Little attention has been paid to the crucially important role of the governance mechanism and the competencies of the new system.

The view of quality as adequate resources revealed itself through increases in funding for the national universities and those universities selected to be in the "investment focus" list, even in the absence of a complete set of mechanisms to monitor and evaluate whether those universities were using resources effectively to achieve their goals. Because of this inadequate oversight, the two decades of innovation, and the steady increase in state investment in education, has *not* resulted in improved quality. On the contrary, quality has deteriorated. This situation shows that a new method of governance is urgently needed to assure and improve the quality of Vietnam's higher education.

From 2004 to the present: Quality equals meeting standards. The year 2004 marks the turning point in the development of quality management in Vietnam. In this year, the government issued a series of important national-level documents, clearly stating its plan to introduce accreditation as a new mechanism for HE

management. Accreditation is a way to manage the quality of higher education. It originated in the United States but has been spread all over the world since the 1990s.

GDETA (2006) reports on some key moments in 2004 when three of these documents were issued. First, on August 2, 2004, the Ministry of Education and Training (MoET) issued Directive 25/2004/CT-BGD&ĐT, which outlined the tasks for the whole education system for academic year 2004–2005. It demanded that the administration at all levels, as well as universities and four-year colleges in the whole country, should "urgently establish and perfect the structure and mechanism of the testing and accreditation system, and start putting this system to work".

Then, on December 2, 2004, the Minister of Education and Training signed Decision 38/2004/QD-BGD& DT to issue the Provisional Regulation for the Accreditation of Universities. And on December 3, the National Assembly approved Resolution 37-2004/QH11, which pointed out that "quality management should be the focus; accreditation activities are to be conducted yearly".

The provisional regulation for university accreditation was promulgated after two years of drafting and revisions, based on comments by universities and experts, both local and international. With this regulation, for the first time in Vietnam's educational history, a transparent and coherent set of quality standards for universities came into existence. As part of the provisional regulation, the 2004 set of standards was not considered a perfect final product; the adequacy and appropriateness of the standards and criteria remained open to debate. Overall, however, this first set of quality standards was able to define the main requirements in terms of mission, goals, structure, conditions and resources, and most of the activities carried out in Vietnamese HEIs.

In the almost three years after the regulation appeared—from 2005 to mid-2007—20 Vietnamese universities, 18 public and 2 private, each representing the best of its kind in its particular location, were chosen for the first (pilot) round of accreditation. After trials were conducted with those 20 universities, the set of standards was corrected, adjusted, and supplemented. The result was the regulation that MoET issued in November, 2007.

The 2007 regulation establishes quality standards for ten aspects of Vietnam's HEIs. Standard 1 applies to mission and goals, Standard 2 to organization and governance, Standard 3 to curriculum, Standard 4 to educational processes, and Standard 5 to managerial, teaching, and support staff. Standard 6 applies to students, and Standard 7 to research and development, innovation, and technology transfer. Standard 8 applies to international relations, Standard 9 to libraries, learning equipment, and other facilities, and Standard 10 to finance and financial management.

These ten standards cover almost all aspects of the governance and operations of a modern university, and do not vary significantly from regional or international standards. The existence of a transparent set of standards to manage the quality of a university can be celebrated as a breakthrough in the educational administration

mentality of the country's leaders; it shows their strong determination to integrate the HE sector internationally, and they promise quality improvement in the future.

Vietnam's Current System and Mechanisms for Quality Assurance

We first describe the current system and then some specific mechanisms.

Quality assurance (QA) system: Internal and external QA. The process of promulgating these quality standards, and planning accreditation based on them, will inevitably require an accompanying organizational structure and governance mechanism to put them into action. Over the past few years, a complete national QA system has been emerging. At the top of this system is MoET's General Department for Educational Testing and Accreditation (GDETA); its role is to act as a national government agency to oversee all QA activities for the whole education system. Meanwhile, at the institutional level, QA cells are being established within the stronger and longer-established HEIs.

The establishment of the national agency for QA marks a revolutionary change in the organisational and governance structure of Vietnam's education system. This establishment resulted from gradual efforts to separate the administration of the assessment function from that of the training function. First, in January 2002, an accreditation unit was established inside MoET's Department for Undergraduate Education (now the Department for Higher Education). Then, in July 2003, this unit was separated from the Department of Undergraduate Education to become the GDETA, supervised directly by MoET according to Decree 85/2003/NĐ-CP. GDETA has been granted an administrative function within the government: it oversees all QA activities in the entire education system (GDETA, 2006). At present, GDETA is the highest advisory body that can participate in decision making at the policy level, for example establishing quality standards and regulating the mechanism that operates the QA processes throughout the system.

At the institutional level, the two national universities (one in Hanoi and one in Ho Chi Minh City) with a higher degree of autonomy are the first two institutions that pioneered in establishing their own QA centers in the late 1990s. These centers play double roles in carrying out QA activities within their own institutions. They perform internal QA functions by assisting the member universities in conducting self-assessment activities, and they also act as external agents, conducting site visits and evaluating the member universities. Other universities, mainly regional ones whose organizational structures are similar to national universities, established their own QA units in the early 2000s, using World Bank money. These universities have two levels of administration: The macro level is responsible for policy making, monitoring, and evaluation, and the implementation level is responsible for carrying out all operational and support activities for education and research. The two QA centers in the two national universities are staffed by people with professional training in QA and have been in operation since their establishment. The other QA units only began to operate early in 2005, as the first accreditation round for 20 universities in Vietnam was beginning.

It is important to note that the existence of a QA unit in the organizational structure of a university has become compulsory, set down in the new University Quality Standards that MoET promulgated late in 2007; the first set of these standards did not have this requirement. With this requirement, the QA system in Vietnam can be seen as essentially completed, in principle if not in reality. It has internal QA units within all HEIs, and the national external QA agency is GDETA, which operates directly under MoET. This model is also in use at the two national universities.

The QA mechanism: The relationship between the QA system and other government bodies. To understand the QA mechanism, it is crucial to consider the relationship between internal quality assurance, the responsibility taken by the institutions themselves, and external quality assurance, the tasks taken on by agencies outside the institutions and by other government bodies that oversee the activities of educational institutions. Depending on their specific circumstances and purposes, different countries will select different QA mechanisms for their education system. Ideally, the two components of the QA system should be independent of each other, and as a whole they should also be independent of any government body (in this case, MoET). This enables them to separate the three different stages in the accreditation process: self-assessment, peer evaluation (or external evaluation), and recognition of the evaluation results. In most developing countries, however, the government body in charge of educational administration is also the one that administers external evaluations. This is the case in many countries in Southeast Asia, including Cambodia, Laos, Indonesia, Thailand, and Vietnam.

In an analysis for the World Bank, Lenn (2004) pointed out four distinguishing factors in the QA mechanisms of different countries: (1) the founding and governance of national QA agencies (governmental or non-governmental); (2) the mode or type of EQA activities (accreditation, audit, or assessment); (3) the source of funding (government or HEIs); and (4) the presence or absence of international participation.

Table 3 summarizes the characteristics of Vietnam's QA system in comparison with those of other countries in the Asia Pacific region, based on Lenn's four distinguishing factors.

As the table shows, Vietnam's system of QA in higher education still lacks diversity and independence from the government, in particular from MoET. The national QA agency was founded and governed by MoET, with no independent status from MoET because it is under MoET's direct supervision. Its funding comes from the state through MoET, and no international bodies participate in either of the critical stages in the accreditation process: the external evaluation and the final result of the accreditation. Lenn (2004) found that international experts only participated in external reviews in QA projects funded by international organisations; this did happen during the first round of accreditation of 20 universities during the period from 2005 to 2007. Given this lack of both diversity and independence, much in Vietnam's QA system still

remains to be improved, to create positive impacts that will change the face of higher education in Vietnam, as the country's education leaders outlined in the HE reform plan.

Table 3. Four distinguishing factors in QA mechanisms

		Founding and Governance				QA Type			Funded by			International Participation	
	Year founded	Founded by government	Non-governmental origin	Independent body	Government-represented body	Accreditation	Audit	Assessment	Government	Institutions	Other	On decision making body	Among external reviewers
Australia	2001	X		X	X		X		X	X			X
China PRC Provincial	2000	X			X	X		X	X	X			
Hong Kong PRC	1990	X		X		X			X	X	X	X	X
India	1994	X		X		X		X	X	X			
Indonesia	1994	X		X		X			X	X			
Japan													
JUAA	1947		X	X		X				X			
NIAD	2000	X		U		X			X			X	
Korea	1982	X		U	X	X			X				
Malaysia	1996	X		X		X				X			
Mongolia	2000	X			X	X				X			
New Zealand	1994		X	X			X			X		X	
Philippines													
AACCUP	1987	X		U	X	X			X				
PAASCU	1957		X	X		X				X			
Thailand	1999	X		U	X		X		X	X			
Vietnam	2002	X		*	*	X			X				

Source: Lenn (2004, p. 17)
Notes: U = Undetermined independent status; * = Pending policy development

QA Activities in Vietnam's Higher Education: Achievements, Issues, and Future Directions

Achievements so far. Looking back at the QA activities conducted in recent years, it is clear that Vietnam's still very young educational QA system can claim several significant achievements. Indeed, at the start of the new millennium, the entire education system was completely unfamiliar with terms like quality, standards, fitness for purpose, self-assessment, external review, audit, accreditation, and recognition. However, only a few years later, the compulsory accreditation of all the country's HEIs has become institutionalized, and QA activities are conducted rigorously. Six recent QA achievements are worth noting:

- The national QA agency, GDETA, was established
- Regulations concerning accreditation activities for Vietnam's HEIs were developed
- The horizontal structure of the QA system was initiated and completed. It includes GDETA, the QA centers of the national and regional universities, and QA units within all HEIs
- The National Accreditation Plan for higher education in Vietnam to 2010 was developed and implemented
- Capacity development was carried out for QA specialists and key personnel, including administrative staff working in QA for the whole country
- The two national universities participated, at both the national and institutional levels, in regional and international QA networks such as AUN (Asean University Network), APQN (Asia-Pacific Quality Network), and INQAAHE (International Network for Quality Assurance Agencies in Higher Education)

Issues and future directions for the QA movement in higher education in Vietnam. Despite these achievements, it would be a mistake to think that Vietnam currently has a sufficiently strong QA system and a mechanism that can serve as a catalyst to bring about important changes to insure and enhance the quality of the country's higher education. QA experts, both within and outside the country, see six unresolved issues that could halt the progress of this movement:

- The national QA system is far from perfect; the national QA agency is still under MoET's direct supervision and governance, and no independent national council for accreditation has been established
- Internal QA has been implemented within HEIs in order to meet the requirements of GDETA and MoET, not because of an inner drive for quality, or a need for continuous improvement to stay competitive
- The current QA mechanism has not facilitated the separation and independence of the three stages in the accreditation process: self-assessment (conducted by HEIs), external review (conducted by a professional QA body), and recognition of accreditation results (conducted by a governmental body or a non-governmental association of HEIs)

- The use of only one set of quality standards, those promulgated by MoET, has not allowed the system to stratify and diversify, an important step for Vietnam's HE system in its present stage of development
- Those working in QA in higher education face a serious lack of human resources, in both quantitative and qualitative terms (ADB, 2008, p. 50)
- The entire system needs an effective management information system to efficiently and usefully assess the performance of HEIs; management information in HEIs is not transparent

In order for the QA movement in Vietnam's HE system to develop further, it is imperative that six recommendations be acted upon immediately:

- Establish the National Council for Accreditation outside of, and independent from, MoET
- Develop and adjust policies at the macro level so that HEIs can implement QA activities themselves for their own benefit
- Establish a QA agency independent from MoET to conduct external reviews for accreditation. It should be responsible for setting up quality standards, conducting quality reviews, selecting and training external reviewers, and issuing accreditation certificates
- Increase the number of people working in the national QA system, and develop their skills, focusing on internal QA and enhancement
- Develop and use an effective management information system for the HE system, construct key quality indicators for higher education, and put forward regulations concerning the administration and use of management information, aiming at universal access and transparency

Introduce programmatic accreditation together with the current institutional accreditation in order to encourage both cooperation and competition between different HEIs to enhance quality.

ORIENTATIONS FOR HIGHER EDUCATION DEVELOPMENT

Proposed Orientations for Developing Higher Education

Compared to Vietnam's dynamic economic growth over the last decade, the education system in general and the HE system in particular are seen to be slow to respond to the country's socioeconomic developments and to people's learning needs, especially the need for a well-trained work force to help the country industrialize and modernize. Vietnam's government has several incentives to speed up its development of HE. The most important is the Resolution on the Fundamental and Comprehensive Reform of Higher Education in Vietnam 2006–2020 (Government of Vietnam, 2005).

The resolution outlines the general objectives for developing Vietnam's HE system. It calls for a substantial and comprehensive renewal of tertiary education

and for substantial changes in education quality, efficiency, and scale, to satisfy the requirements of national industrialization and modernization, and international economic integration, as well as the people's demands for learning. By 2020, the system should attain the same advanced standards as other countries in the region, should approach the advanced levels seen around the world, should be highly competitive, and should be appropriate to the socialist-oriented market mechanism. The resolution also mentions seven important tasks and solutions:

- *Renew educational-level structures and improve the network of HE institutions.* Higher education will be divided into two streams: academic and vocational-technology, and the second stream will have priority, accounting for about 80% of the whole. Attention will be paid to developing the private sector, so that around 40% of students will be studying at private institutions by 2020. To build some universities up to international standards, efforts will be made to focus investment on them, to mobilize domestic and foreign specialists, and to adopt appropriate mechanisms for this process.
- *Renew curricula, teaching methods, and processes.* Efforts will focus on restructuring the framework of programs and ensuring that students can transfer between educational levels. Curricula will be renewed, and closely associated with practical socioeconomic development. Efforts will be made to promote students' skills and potential for research, creative work, and the professions, along with their ability to work in the community, and their career prospects. Training methods will be renewed in three ways: by equipping learners with better learning methods, encouraging them to take initiative, and applying information and telecommunications technologies in teaching and learning activities. College entrance examinations will be improved by applying modern technology for educational measurement.
- *Renew the planning, training, mentoring, and employment of instructors and administrators.* Plans will be created and implemented to develop a contingent of HE instructors and administrators, ensuring sufficient quantity and high-quality personnel, to satisfy the requirements of this HE renewal effort. Instead of working under the regulations for civil servants, instructors will be given long-term contracts, and an effort will be made to ensure equality between instructors in public and private institutions. Procedures for appointing and terminating faculty will be reformed, so that HEIs will carry out these procedures according to national standards.
- *Renew the organization of scientific and technological activities.* At least 1% of the annual state budget will be allocated to HEIs to perform their scientific and technological tasks, as provided for by law.
- *Renew the mobilization of resources and financial mechanism.* Localities should adjust their planning and should reserve land to build modern HEIs that meet regional and international standards. The state will adopt policies to offer preferential treatment, and supports and incentives to encourage both domestic and foreign investment in higher education. It will also secure ownership rights for investors, and consider their material and spiritual benefits. Policies on

tuition fees, scholarships, and student credits will be reformulated to establish principles for sharing tertiary education expenditures among the state, learners, and the community. The state will provide full or partial tuition fee supports for policy beneficiaries and the poor, and will allocate such supports directly to learners.

– *Renew management mechanisms.* Public institutions will be transferred to an autonomous operating mechanism that will give them full legal status as persons and the right to decide on, and bear responsibility for, their training, research, organization, personnel, and finance functions. The state will abolish the mechanism of line-ministry control over public HE institutions, and will formulate a mechanism in which the state-owner has representatives at them. The state management will concentrate on formulating and implementing the development strategy; it will direct the operation of the quality control and inspection system, and will improve the legal environment. It will enhance inspection and examination activities, and more generally regulate the structure and scale of HE, satisfying the country's demand for human resources at each period. It will also elaborate a law on HE.
– *Work towards international integration.* A strategy on international integration will be formulated, and efforts will be made to raise the system's capacity for cooperation and its competitiveness in implementing international treaties and commitments. More teaching and learning of foreign languages, especially English, will be organized, and students will be encouraged to enroll in foreign training programs that allow them to pursue their studies at home. The number of foreign students in Vietnam will be increased. Favorable conditions will be created for prestigious institutions from around the world to open campuses in Vietnam or enter into cooperative training programs with Vietnamese institutions.

Some Issues in the Development of Higher Education

Resolution 14 is very comprehensive and ambitious, but its implementation has encountered many difficulties and challenges. To completely understand how Vietnam's HE system has developed in recent years, eight issues should be considered.

Development of the scale of higher education. The number of HEIs has risen rapidly since 2005. On average, one new institution has opened each week; about three quarters of them are universities and one quarter are junior colleges and private universities. Obviously, this development is occurring too quickly and will be inadequate, because the universities outnumber junior colleges by three to one, and public institutions outnumber private ones. The fact that new universities and colleges outnumber junior colleges means the academic factor is being emphasized over the vocational. The fact that public institutions outnumber private ones means that a lot of private monies are not being mobilized for HE. This situation goes against the orientation of Resolution 14. In addition, while the number of

university students increased by 11% between 2007 and 2008, from 1,363,167 to 1,540,201, the number of teachers rose by just 10%, from 48,579 to 53,518. Thus the student-to-teacher ratio rose from 28:1 to 29:1. Moreover, at the 14 national major HEIs—the standard-setters in terms of academic training quality—that ratio is also too high, ranging from 35:1 to 85:1, except at the two medical universities where it is under 10:1. These numbers indicate that the development of HEIs has not reversed the shortage of university teachers; in fact, it has increased the pressure on them.

Improvements in the university entrance examination. The entrance examination is just one part of university training, but in Vietnam it is a sensitive activity that receives considerable attention from all of society. As a result, it affects not only the quality of HE but also the development of education in general. Since 2002, MoET has been responsible for a common entrance exam and all universities recruit their students based on its results. Since only 20% of those who take the exam each year are recruited, the exam always creates anxiety. Since 2006, objective tests have been used for the entrance examination. MoET plans to reorganize this process, offering only one national examination that will primarily involve multiple-choice tests. One passage in Resolution 14 encourages the country to improve the entrance examination by applying "modern educational measurement technology", but this has not yet happened.

Improvement of the faculty. The government proposed several powerful measures to improve the quality of university faculty; one is the plan to train 20,000 Ph.D.s for the system by 2020, both domestically and internationally. However, it is difficult to recruit candidates who have the professional competence and command of language to be sent abroad and there are challenges in training Ph.D. in domestic institutions.

Curriculum reform and a credit-based system. The Education Law gives university institutions autonomy in management but requires them to follow the standard curriculum developed by MoET. This means that each HE curriculum must follow a fixed framework in terms of content and time duration, and some subjects are compulsory for specific specializations. So far, some standard curricula have been developed. However, there has been no consensus about developing the standard curricula for the system. A recent noticeable change is the reduction by one half of the time required for ideological subjects, and the number of such subjects has been reduced to three.

The MoET planned to apply a credit-based system to the whole HE system by 2010. However, in addition to redeveloping the training programs and preparing the infrastructure to meet the requirements of the credit-based system, another significant challenge is introducing innovations in teaching and learning methods. In essence, the credit-based system will individualize learning in a system of mass education. Therefore when the system is applied, it must be emphasized that the reason for innovative teaching and learning methods is to make students more

active learners and more capable of independent study. Because both teachers and students are very accustomed to passive habits of teaching and learning, this kind of innovation cannot be carried out quickly; it may take generations.

Non-public institutions of higher education. Many government documents pay considerable attention to the sector of non-public HEIs. Between 2005 and 2007, 17 non-public HEIs were established, contributing to the total of 47 non-public HEIs (30 universities and four-year colleges, and 17 junior colleges). However, the administration of these institutions has faced major challenges. First, the government's role is described inadequately or inconsistently in some legal documents. Regulations state that non-public institutions must be established as private institutions regardless of their for-profit or not-for-profit status, and not-for-profit institutions are encouraged. However, conflicts and ambiguities have arisen related to such important concepts individual ownership vs. collective ownership and the mechanisms that determine whether or not an institution is profit-making. In addition, some policies concerning equality for public and non-public teachers and students are only mentioned in Resolution 14, and not stated as regulations. For instance, students at non-public institutions are not entitled to government scholarships, though most come from low-income families, and a very small number of instructors at non-public institutions are entitled to enroll in the government's training programs abroad. If a lack of consistent policies and government investment results in the non-public system failing to develop appropriately, it will be hard to reach the target of having these institutions train 40% of the total number of students.

Some issues related to HE management. The most important idea of Resolution 14 is to make HEIs more autonomous and accountable, while government agencies maintain their governing roles from behind the scenes. Some important mechanisms have been created to carry out this idea. For example, boards of trustees can increase autonomy, guarantee security, and avoid dictatorship in management; they can serve as an important and powerful organ that exists above and beside the rector's administration. So far, however, only a few institutions have accepted this new mechanism, and hesitantly; the administrative and personnel departments of institutions are reluctant because it removes their tradition of centralized management. A second important mechanism to assure accountability is QA and accreditation, which we described earlier.

Higher education cost-sharing. Cost-sharing among the government, learners, parents, and communities is the most important solution to the problem of HE costs. It presents a great difficulty to countries that are committed to subsidizing HE, such as the wealthier countries in Western Europe and former socialist countries including Vietnam. The government has proposed a model of high tuition/high aid, and has agreed to directly provide support, either entire or partial, to low-income students and welfare recipients. However, it has encountered great difficulty in implementing this policy. The issue of tuition increases has been

discussed twice in Congress in the last decade but it has been turned down. At the beginning of school year 2007–2008, the prime minister took a powerful course of action, proposing a loan program for disadvantaged learners, and appropriating about US $2 billion to the loan program for nearly one third of all HE and vocational students. It is hoped that society will consent to a policy of tuition increases following this loan program.

International integration of higher education. Since Vietnam joined the World Trade Organization in 2007, its HE system must obey some regulations set up by the GATT (General Agreement on Tariffs and Trade), to which Vietnam has commitments. However, Vietnam's system is not yet strong enough to compete on the open market of HE services. Therefore, developing strategies to integrate Vietnam into international higher education is a matter of great concern, as Resolution 14 emphasized, but so far no activities have focused on this objective.

Reasons for the Inadequate Development of Higher Education in Vietnam

In Resolution 14, Vietnam's government proposed sensible orientations to develop the country's HE system, but many conflicts have arisen during the implementation. What causes these inadequacies and conflicts? First, although policy makers have appropriate knowledge and vision, administrative departments habitually implement policies based on a centralized mechanism, creating great obstacles. This keeps the current HE administrative system from adequately implementing the requirements of the HE innovation. Second, and no less important, those who manage education in general and especially those in HE are not yet highly professionalized; the result is inconsistencies in the regulations issued and shortcomings in legal documents. Furthermore, as some people in the academic community state, it is not enough just to implement a few innovation policies in the system. This is because Vietnam is facing profound socioeconomic changes during its transition into a market economy, along with dramatic changes around the world during the process of integration and globalization. These will require a fundamental educational reform in Vietnam in the new era.

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EDUCATION DEVELOPMENT IN KENYA

Enhancing Access and Quality

In this chapter we examine formal education development in post-independence Kenya. We place particular emphasis on key challenges to providing education of sufficient quality to assure that all Kenyan students acquire the capacities they need to participate as productive citizens in their local, national, and global communities. Our focus is on national policy initiatives for education reform that were developed under successive government leaders.

In the first section we provide background on the economic development of Kenya, contrasting it with South Korea, a nation that was at a similar economic level in the 1960s. Section two contains a brief look at the pre-independence period in Kenya when Christian missions and colonial government represented the main educational frameworks; within them western values and social practices were introduced and promoted to replace the traditional approaches to education that existed in local communities before colonization. In the next sections we examine education reform policies and challenges in post-independence Kenya, focusing specifically on the critical policies that changed the structure and expanded education under each of the three presidents: Jomo Kenyatta (1963–1978); Daniel Moi (1978–2002); and Mwai Kibaki (2003–present). We conclude with a discussion of the ongoing reform initiatives in Kenyan education, the role of planning and effective implementation, and continuing issues with governance and corruption that disrupt the flow of resources to schools.

BACKGROUND

Kenya, located in Eastern Africa, is bisected lengthwise by the Great Rift Valley that runs from Jordan in the north to Mozambique in the south. Kenya shares common borders with five other nations: Tanzania to the south, Uganda to the west, Sudan to the northwest, Ethiopia to the north, and Somalia to the east. The Indian Ocean coastline that forms the Eastern border stretches some 480 kilometers from the Somali border to the Tanzania border. The country has a varied landscape of plateaus and high mountains creating contrasts in climate, from hot and humid along the coast, to cool in the central highlands, and hot and dry in the arid and semi-arid north and northeast.

Kenya gained independence from Great Britain in 1963 and has been a republic since 1964. For administrative purposes, the country is divided into eight provinces that are further subdivided into districts. The current population is just over 40 million, making it the 33rd most populous nation in the world. Only 22% of the

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population lives in urban areas; three quarters of the labor force is engaged in agriculture. The rural situation is marked by continuing stagnation, subsistence agriculture, low incomes, and increasing vulnerabilities among poor people. Lack of access to markets is a problem for many small-scale enterprises in Kenya. The rural population is poorly organized and often isolated, beyond the reach of social safety nets and poverty programs.

Kenya is classified as a low-income country. With a 2009 per capita GDP in Purchasing Power Parity (PPP) of $1,600, it ranks 100th in the world. In 2008, the estimated unemployment rate was 40%, placing Kenya at 190th in the world (CIA, 2010a). On the Human Development Index (life expectancy, educational attainment, and standard of living) of the United Nations Development Program, Kenya ranks 148th among 177 countries (UNDP, 2007). That report notes that half the Kenyan population is poor, with about 10 million people living in extreme poverty without a visible means of support. Increasingly, government policies and investments in poverty reduction tend to favor urban over rural areas.

Overall, poverty is widespread, declining only marginally in the past decade, from 52.9% in 1997 to 49.1% in 2005/6. Poverty, though still high, declined much more dramatically in urban than rural areas during this period, from 49.7% to 33.7% (National Bureau of Statistics [NBS], 2007, p. 43). Kenya's current poverty problems have been intensifying because of poor governance, corruption, and mismanagement of public resources, as well as growing youth unemployment, a common set of issues across many countries in Sub-Saharan Africa.

To put the economic development pattern of Kenya from independence to the present in context, it is instructive to contrast it with South Korea, whose per capita GDP in the 1960s "was comparable with levels in the poorer countries of Africa and Asia" (CIA, 2010b). In 1960, just 27.7% of South Koreans lived in urban areas (*Global Finance*, 2010). However, 50 years later, South Korea, with a population 15% larger than Kenya's but concentrated in a much smaller land area, had urbanized (81%); built a strong, industrially-based economy (25% of labor force in industry, 68% in services); and grown to be the 13th largest world economy (PPP of 1.36 trillion) with a GDP per capita of $28,000 (PPP), ranking 49th in the world (CIA, 2010b). South Korea has achieved virtually universal secondary education with more than 80% of its high school graduates continuing on to higher education. In Kenya, in 2006, just 25.9% (62,926) of all students (243,319) sitting for the Kenya Certificate of Secondary Education (KCSE) qualified for admission to public universities (grade of at least C+) and only 7% (17,000) were actually admitted due to limited space (Kenya School Magazine, 2010, Tables 4–11).

As of 2009, 81.6% of the total population in South Korea used the Internet, compared with just 10% in Kenya. The public demand driving this dramatic expansion of the South Korean education system has as its foundation the enduring fervor of parents who "believe that the education of their children is their foremost responsibility"; thus "they endure any suffering necessary to make certain that excellent schools and other educational resources are available" (Park & Weidman, 2000, p. 178).

HISTORICAL DEVELOPMENT OF EDUCATION IN KENYA

Indigenous education had existed for centuries in Africa before the introduction of formal, Western schooling by missionaries and British colonial authorities who viewed the traditional education system as "backward". Consequently, Africans were encouraged to abandon their traditional approaches and embrace a new formal system of education. Colonial values replaced traditional African values. In the process, indigenous education was relegated to the margins, associated as it was with the rural people who lost their socio-economic power with the coming of British domination. In the mid-19th century, missionaries laid the foundation for formal education in Kenya when they began their activities, mainly in areas along the coast where they introduced reading as an important mechanism for spreading Christianity.

In 1902, a school for European children was opened in Kenya, followed a few years later by another school for Asian children. By 1910, 35 mission schools had been founded, emphasizing reading, writing, and arithmetic (Sheffield, 1973). The missionaries, viewing indigenous education as inferior, were determined to expose Africans to a superior culture and instruct students in the word of God. The curriculum in the mission schools was disconnected from village life and often aimed to alienate children from their African culture and value system. Unlike indigenous education, formal schooling under the missionaries (and colonial government) was not part of people's economic life and did not serve the African community. Over time, this meant a steady but limited flow of African manpower towards colonial enterprises.

Colonial education policy was influenced by three important factors: (1) conflict between the needs of the settler economy based on plantation agriculture and British industrial needs; (2) conflict among foreign interests (settlers, missionaries, and the British administration) based on tensions between the colonials' desire to "modernize" Africa and the Africans' determination to preserve their customs, cultures, and traditions; and (3) the challenge of devising an educational system to provide a "relevant" education to Africans that would make them good laborers and good Christians but not "intelligent thinking" human beings who might question and start to oppose the colonial regime (Sheffield, 1973). The objectives of education in this case were not to help the Africans live in harmony with their local environment but rather to perpetuate the master-servant status quo between the colonizers and the colonized.

A pattern of establishing expert commissions to review the structure and function of education was begun in Kenya in the pre-independence era. Colonial commissions were guided by a philosophical foundation for British educational policy in Kenya designed to create a small, semi-literate, indigenous population of "good" Christians and to educate Africans to provide labor for Europeans (Sheffield, 1973). The first commission, headed by Professor Nelson Fraser, was appointed in 1909. He emphasized an academic curriculum for white and Asian children. For Africans, he recommended an industrial training curriculum with dual

goals: service under a white employer and work in his own community to help the protectorate prosper.

The 1919 Education Commission Report argued that secular government schools could not be successful without "proper" religious and moral instruction. It recommended the development of education largely through the missionary societies' "assisted schools", which continued to use education as a tool to expand religious activities and enlarge their own spheres of influence. The 1924 Phelps-Stokes Commission Report criticized the African educational system provided by mission schools as being too literary and impractical for the realities of peasant-based African societies. It re-emphasized the need for agricultural and vocational education suitable for the natives and was totally opposed to an academic education for Africans (Sheffield, 1973).

Many commissions followed, all aimed at redefining what was best for the Africans. In the process, Africans who had embraced colonial education began to react to their treatment. When the missions banned female circumcision in 1929, the Kikuyu of the Central Province began to boycott mission schools and demanded an end to their monopoly over education. The Kikuyu opened independent schools that relied on indigenous community fundraising and collective labor to build schools. By 1939, there were 63 independent Kikuyu schools with a total enrollment of 12,963 students (Eshiwani, 1993). Nonetheless, the British determined the kind of education that would be given to the Africans, limiting it primarily to practical skills suitable for working on the Europeans' farms with no regard for what was appropriate for the needs of Africans. Until 1944, Africans were prohibited from participating directly in politics and were forced to live in reserves to work on the settlers' farms. In order to maintain control over Africans, the colonial government forced them to work but still imposed taxes.

The Beecher Commission on Education was established in 1948 to make recommendations for the implementation of a 10-year plan to revamp the educational system. The Beecher Commission Report concluded that primary education lacked significant financing or adequate control, and that an increasing number of educational facilities were of generally inadequate quality. To rectify the situation, the commission recommended stricter control over primary schools through greater centralization, a position the Africans interpreted as an attempt to exercise control over their schools. Africans had established independent schools to provide education for their children because the missions and government schools were not adequate. The independent schools flourished for about 22 years. In 1952, the government closed these schools because they were seen as major threats to colonial sovereignty (Sheffield, 1973).

It is important to note that the treatment of "African education" as a separate and inferior entity led to certain historical consequences that are still a problem in the present system of education, particularly for the poor and marginalized living in disadvantaged regions. During the 10 years before independence, more capital was invested in education for Europeans and Asians, who represented 3% of the population, than in the education of the African population, who represented 97% (Ominde, 1964). The assumption was that these were separate communities that

would remain separate for a long time to come. Consequently, the education provided had, as far as possible, to "suit" the requirements of each community. Moreover, the idea was often advanced that there ought to be some correspondence between a community's contribution to national revenue and the educational dividends that it received (Ominde, 1964).

Colonial education for the Africans was inadequate in both quantity and scope, with narrow and restrictive objectives. For instance, out of a total of 25,903 students in secondary schools in 1962, only 8,033 (31%) were Africans (Eshiwani, 1993, p. 202). These figures must be seen in comparison to the total population, 97% of which was African. The restrictive effect of colonial policy on African education meant that a large majority of children of school age were not going to school. Only a very small number of Africans passed through the system, thus creating a small, educationally elite group, many assuming leadership positions after independence.

The Jomo Kenyatta Administration (1963–1978)

The first president elected following Kenyan independence from Great Britain in 1963 was Jomo Kenyatta. Like many other newly independent African countries, the new government in Kenya emphasized that education was critical for national development and immediately embarked on developing policies that would address issues of opportunity, access, and equity. Key objectives included (1) producing the skilled and high-level personnel needed to facilitate the urgent process of socio-economic development; (2) providing education that would help young people acquire a sense of nationhood by promoting positive attitudes of mutual respect that would enable them to live in harmony and to contribute to the society's aspirations (Ominde, 1964); and (3) offering equal opportunity and social justice for all Kenyans.

Pursuing these objectives was essential because colonial education had been designed to set the races apart in a complex of relationships that ensured that one group was dominant over others. Even among Africans, ethnic group differences were manipulated to keep the various communities apart (Gould, 1993). Kenyatta's first public address to the nation after independence and a subsequent government document laying out his policy directions affirmed these objectives (Republic of Kenya, 1965).

Kenyatta saw education as a vehicle to restore African dignity, to recapture the national heritage that had been diminished by the imposition of an alien culture, and to prepare Kenyan society for its place in the modern international community (Republic of Kenya, 1965). Following the pre-independence pattern, the new Ministry of Education (MoE) set up its first national commission in 1964 to assess the education system, review policy needs, and recommend improvements to the government.

Ominde Commission (1964). Under the chairmanship of the distinguished African academic, Professor Simeon H. Ominde, then Minister of Education, the

Kenya Education Commission (Ominde, 1964) undertook an exhaustive investigation of all aspects of education in Kenya. Ominde was one of the few Africans to hold high academic credentials at the time and was a product of the colonial education system, having earned his doctorate at the University of London in 1963. The task at hand was to look critically at the situation of education and formulate official educational policies to meet the needs of a newly independent nation. The urgent need was to abolish segregation on the basis of race and foster the psychological basis of nationhood, both to promote national unity and to serve as an instrument for conscious change of attitudes (Ominde, 1964).

Table 1. Primary and secondary education enrollment in Kenya, 1963–2009 (selected years)

	Primary Education			*Secondary Education*		
Year	Schools	Students	Teachers	Schools	Students	Teachers
1963	5,058	891,553	22,772	151	31,120	1,602
1964	5,150	1,014,791	27,828	222	35,921	2,000
1966	5,699	1,043,416	33,522	400	63,193	3,004
1968	6,135	1,209,680	37,923	601	101,351	4,644
1970	6,123	1,427,589	41,479	783	126,855	5,881
1972	6,657	1,675,919	53,536	849	161,910	7,106
1974	7,668	2,705,878 [a]	78,340	1,019	195,832	-
1976	8,544	2,894,617	89,074	1,268	274,838	11,438
1978	9,243	2,994,991	92,046	1,773	354,452	14,296
1980	10,268	3,931,500	102,489	1,682	410,626	15,916
1986	12,943	4,624,278	139,326	2,395	500,000	21,966
1988	14,288	5,123,581	108,424 [b]	2,717	540,192	16,611 [b]
1990	14,864	5,392,319	121,461	2,678	618,461	19,431
1992	15,465	5,563,987	135,406	2,640	629,062	27,447
1994	15,906	5,557,008	155,591	2,834	619,839	31,593
1996	16,522	5,597,656	171,055	3,004	658,253	34,923
1998	17,623	5,919,721	185,736	3,081	700,538	40,437
2000	18,617	6,155,500	173,005	3,197	772,464	38,997
2002	19,124	6,062,900 [c]	175,792	3,687	778,601	44,005
2003	23,554	7,159,500 [a]	176,316	5,073	882,513	44,792
2004	24,643	7,394,700	176,381	5,142	926,150	46,479
2006	25,929	7,632,200	162,072	5,659	1,030,080	42,183
2007	26,104	8,330,200	171,643	6,485	1,180,267	44,076
2008	26,206	8,563,800	170,059	6,566	1,382,211	42,867
2009	26,607	8,831,400	171,301	6,971	1,507,546	47,958

Notes: [a] Large enrollment increases were caused by eliminating school fees for grades 1–4 in 1974 and grades 1–8 in 2003. [b] For years 1988 to 2009, these are the numbers of "trained" (graduate, approved, S1/Diploma) teachers. [c] For years 2002–2009, enrollment numbers are for grades 1–8 of formal education; non-formal education enrollments are not included.

Sources: For 1963–1986 data, Eshiwani (1993, Table 4.2); for 1988–1994 data, CBS (1996); for 1996–2000 data, CBS (2003); and for 2002–2009 data, CBS (2007), NBS (2009, 2010).

Another significant recommendation was to expand educational opportunities for Africans, especially at the secondary and tertiary levels, to meet the demand from a fast-growing population and to build an educated workforce to meet the economic development needs of the new nation (Ominde, 1964). The commission's purpose was to change the atmosphere of education and to endow it with a new relevance for the African population, instead of the colonial/missionary agenda.

The Ominde Commission recommended policy to enable expansion of the education system. It recommended increasing the opportunities for access to the formal sectors of education through the establishment of schools with funds generated by local community members. When President Kenyatta addressed the nation at independence in 1963, he urged the people of Kenya to work hard together to build the nation as an extension of the African family spirit of "harambee", a Swahili word meaning pulling together in the tradition of mutual social responsibility. From that time on, "harambee" became a motivating force for development (Eshiwani, 1993, p. 21).

As Table 1 shows, enrollments rose from 891,553 primary and 31,120 secondary school students in 1963 to 1,209,680 primary and 101,351 secondary school students in 1968. Even though many more Africans had the opportunity to attend schools, education reform brought a series of new challenges. Expansion was initially justified in terms of economic factors, especially manpower development needs. However, as the locally funded "harambee" schools grew in number and sought government support other rationales were put forward, including increasing opportunity for social mobility, particularly for those moving from rural to urban areas. With the continuing emphasis on meritocratic selection through national examinations at the end of primary and secondary school, the colonial educational system was actually reinforced (Court, 1976).

This approach neglected development in rural areas where the vast majority of Kenyans lived, a critical mistake that was repeated in the ensuing years. The Ominde Reports (1964, 1965), for instance, were widely criticized for creating a system of education that became elitist and promoted rural-to-urban migration. It was also seen as a wasteful system because many students did not complete the transition from primary to secondary school, and unemployment increased because the labor market could not absorb even those who completed secondary school.

Gachathi Commission (1976). In search of new solutions to the growing mismatch between the demands of the emerging labor market and the education being provided, the government appointed the National Committee on Educational Objectives and Policies chaired by Peter J. Gachathi, then Permanent Secretary in the Ministry of Education (Gachathi, 1976; Republic of Kenya, 1978). This was the second commission appointed by President Kenyatta in response to numerous problems the education system had experienced, especially the relevance of education to rural development, the enormous increase in the cost of education since independence, and the rapidly rising level of unemployment among school leavers. Three goals were set for this committee: (1) evaluate the system of

education; (2) define a new set of educational goals for the second decade of independence; and (3) formulate a specific program of actions to achieve these goals (Gachathi, 1976). The committee prepared and submitted a report (Republic of Kenya, 1978) that formed the basis for preparing a sessional paper for Parliament and policy statements on education by the government.

In the decade following the Ominde Report of 1964, Kenya's economy had not grown as anticipated. Instead, for Kenyans the cost of education had become almost unbearable; meanwhile, the rates of unemployment and rural-to-urban migration were rising. Although the government had achieved considerable success in employment in the years immediately after independence, it now faced a major challenge: creating more employment opportunities to accommodate the growing demand. The transition from a traditional society dependent on agricultural subsistence to a modern society had produced undesirable results that had become impediments to economic growth as the majority of people left their rural homes to search for employment in urban areas (Gachathi, 1976; Republic of Kenya, 1978).

These rural-to-urban migrations were creating urban slums with all their consequent problems. Also, rising school enrollments had been accompanied by high dropout rates; this wasted the funds spent on education in terms of both human resources and productivity. Between 1964 and 1975, the transition rates from primary to secondary school stayed at levels just over 30%, due largely to the insufficient number of secondary schools (Gachathi, 1976).

The academic system of education had encouraged the myth that formal education automatically led to high-wage employment in the modern urbanized sector of the economy (Bigstein, 1984). These problems were blamed on the Ominde Reports which were criticized for focusing on quantitative expansion of education at the expense of quality improvement. The policies adopted on the recommendations of the Ominde Reports had neglected the skills needed for rural development. A new approach was needed to focus more on making education more relevant to the current and future needs of a modernizing economy that requires more technological inputs and skills for its development (Anderson, 1973). The Gachathi Commission was entrusted to provide the government with a policy document that would serve as a framework for reforming the education system to meet the needs of Kenyans, especially those in rural areas.

The Gachathi Committee identified two key problems with the education system in Kenya. First, most of the gains from independent Kenya's rapid economic growth tended to concentrate in the modern formal sector of the economy. Since only the relatively few people who completed secondary and tertiary levels of formal education found it easy to enter this sector, the majority of Kenyans were left with low-paying jobs or none at all. Second, the objectives, structure, and content of the education system were highly selective. The aim was to produce a few individuals who were well equipped to take their places in the modern formal sector of the economy (Gachathi, 1976).

The situation required an urgent review in order to forestall a possible distortion of priorities in planning the economy. The quantitative expansion in the education system during the first decade of independence had highlighted the incipient

competition among graduates for individual, social, and economic advancement within the small but expanding modern sector of the economy. Furthermore, this expansion had absorbed an ever-increasing proportion of the resources the nation had available for all services, including education, that were necessary for social change (Anderson, 1973).

The Kenyatta government was anxious to create new means for individuals to acquire skills and abilities that would improve their social and economic status and make them self-sufficient. Therefore, it declared its intention to encourage the growth of community-financed harambee institutes of technology. These would cater for individuals of widely varying backgrounds and ages by providing specific forms of training and skill development within settings that were responsive to the needs in rural areas. These institutions were expected to address themselves to the more specialized problems of skill development at the community level, thereby motivating individuals and stimulating employment, both flexibly and efficiently. In the long run, those institutes of technology would be expected to evolve into a network of institutions that sought to develop the abilities of community members through means that the formal educational system could not provide.

Among the many recommendations appearing in the Gachathi Report (1976, Republic of Kenya, 1978), three were particularly important. First, access to seven years of basic education for every child should be regarded as a fundamental right and provided free of charge. Second, public funds should be directed to improving the quality and content of education. Third, the government should continue to review the curriculum, methods of teaching, and forms of selection for student transition that were being used at the primary and secondary levels, with a view to making the content of the educational system more relevant to the country's social and economic needs. Much had been written and said by the public against the Certificate of Primary Education (CPE) and about the need to abolish it. And concern was growing about the deteriorating quality of teaching in primary schools and the consequent poor performance by students in examinations. The Gachathi Report stressed that no improvement of education quality could be achieved without addressing the quality of teachers.

Daniel Moi Administration (1978–2002)

Jomo Kenyatta died in 1978 and was succeeded by his vice president, Daniel Moi. Although the education system inherited by the Moi administration was much improved, the country still faced major challenges of underemployment and unemployment and unequal distribution of resources between regions. The poor and marginalized did not enjoy the same opportunities as those from privileged parts of the country. To address these problems, the government focused on making the curriculum more vocational through village polytechnics that would develop students' skills to allow them to become self-employed, especially in rural areas; it also expanded the civil service in the late 1970s.

President Moi continued Kenyatta's efforts to strengthen the harambee initiatives, particularly in disadvantaged parts of the country, and helped build

more schools, at both primary and secondary levels. While the harambee schools tended to be of relatively low quality compared to government-funded schools, they did provide opportunities for rural children to get at least a primary education. They also reflected strong grassroots support of education at the community level.

President Moi's regime represented the voice of the marginalized communities located in the relatively underdeveloped areas inhabited by "the smalls", "the unmobilized", and "the have-nots" (Barkan, 1994, p. 170). In the post-independence years, the education system had been manipulated by wealthy ethnic groups and had not benefited all Kenyans equally. According to Barkan (1994), President Moi was committed to ensuring a more equitable distribution of resources for education. Having come from a disadvantaged community and been trained as a secondary school teacher, President Moi was more determined to address these issues. He pushed for several policy changes and reforms in the education sector that had far-reaching implications for the country. Within ten years he overhauled the education system and oversaw the construction in more remote areas of schools that could compete effectively with those in the more established areas. Like his predecessor, however, he did tend to manipulate the education system to meet his political ends.

President Moi announced free primary education in 1978 as a measure to facilitate more participation by poor children, along with a free milk program to help feed poor children. Unfortunately these policies did not materialize and soon education became very expensive for the poor, resulting in high dropout rates and wastage in the school system. The need to correct the shortcomings in the education system coincided with the government's desire to help the marginalized communities, especially those from the Arid and Semi-Arid Lands (ASALs), as well as its efforts to maintain a fair balance among the communities that were already well ahead. Later political developments in the country would influence the nature and course of the reforms and other changes to be effected.

The post-1980 reforms in education in Kenya cannot be understood without reference to President Moi's commitment to uplifting marginalized communities, which formed the bulk of his political support. He also sought support from minority ethnic groups in the face of opposition from a very well entrenched political elite led by the Kikuyu that had dominated the national political landscape during Kenyatta's time. President Moi was also instrumental in expanding higher education, appointing the Mackay Commission in 1981 to study the country's needs for higher education.

Mackay Commission (1981). The task of the Presidential Working Commission on the Establishment of the Second University in Kenya (Republic of Kenya, 1981) was to evaluate the higher education system in relation to the country's objectives for rural development. The Mackay Commission recommended establishing a second public university to complement Nairobi University. The country was facing growing unemployment, intensified by the migration of rural secondary school graduates to the cities in search of employment opportunities in the formal sector. The role of the second university would be to train individuals to help

enhance rural development, thus promoting the government's interest in matching academic content to social and economic development needs. Consequently, faculties of agriculture, medicine, and development studies would be among those established. The creation of a second public university would enable the government to maintain its control over higher education, which was being threatened by the potential growth of private universities, which were taking advantage of the increasing numbers of students completing secondary school. This new institution was ultimately established in Eldoret, in western Kenya, and named after President Moi.

Another significant recommendation of the Mackay Report was to restructure Kenya's system of education, moving away from the British structure of seven years of primary, four years of secondary, two years of advanced secondary, and three years of university (7-4-2-3) culminating in a bachelor's degree. The new structure resembled a common American pattern, with eight years of primary, four years of secondary, and four years of college or university (8-4-4) leading to the bachelor's degree. Curricular changes were recommended that included more emphasis on practical courses so that those who did not go on to higher education would have skills for jobs in the emerging labor market or for self-employment. The report also recommended that all students at the secondary level be required to take science and mathematics for graduation.

These recommendations, similar to those cited in the Gachathi Report (1978), were seen as addressing problems related to a sluggish economy with high unemployment, rural-urban migration, and a growing demand for higher education. The key policy focus was on improving education financing, quality, and relevance, and expanding university education at a time when provision of instructional materials through the National Textbook Scheme was inefficient and, therefore, adversely affected the quality of teaching and learning. It also focused on rural development, which had been neglected as a key driver of overall national development.

Although it emphasized a more "practical" curriculum, the 8-4-4 system continued to be highly selective. It retained streaming or tracking at all levels along with rigorous national examinations for the transitions from primary to secondary and from secondary to higher education that existed under the 7-4-3-2 system. The continuing inequity across the educational system led the government to appoint another commission in 1988.

Kamunge Commission (1988). The Presidential Working Party on Education and Manpower Training for the Next Decade and Beyond (Kamunge, 1988; Ministry of Education [MoE], 1988) was the second commission appointed by President Moi to review education and training. The commission conducted a comprehensive review of national educational philosophy, policies, and objectives to ascertain whether they were in consonance with changing social, cultural, economic, and political demands in the country, and to recommend ways and means of improving the existing situation.

The commission emphasized that it was mainly through education, training, and research that the nation would be able to meet the many challenges of socio-economic development and industrialization, utilize modern technology, and enhance the quality of life for all Kenyans (Kamunge, 1988). It supported the 8-4-4 system of education, especially its broadly-based, more vocationally-oriented curriculum. Recognizing the increasing financial demands of education, it proposed cost-sharing, arguing that because of the vocational orientation of the new curriculum, its implementation required better physical facilities, teaching and learning materials, and teachers. In order to sustain quality and relevance, it argued, it would be necessary to coordinate and harmonize curriculum, examinations and certification, and to ensure effective management and supervision at all levels (Kamunge, 1988; MoE, 1988).

Kenya was under pressure due to the structural adjustment policies of the World Bank and the International Monetary Fund (IMF), which aimed to reduce social sector expenditures, including education, that were seen as contributing to the increasing debt and being an obstacle to economic development (World Bank, 1988). The cost-sharing recommendations of the Kamunge Report had negative effects on the education of poor people, especially the rural poor. Communities and parents were expected to take on more responsibility to pay for the building of schools and teachers' houses. Parents also had to meet the costs of books, uniforms, exercise books, and other fees. Many children stopped going to school and enrollment figures began to decline significantly. Between 1992 and 1994 enrollments declined (See Table 1), gross enrollment ratios shrank, and quality and relevance dropped (Abagi & Odipo, 1997; Abagi & Olweya, 1999).

Koech Commission (1999). In 1999, President Moi appointed another education commission, this time one focused on Totally Integrated Quality Education and Training (TIQET). This commission was mandated to recommend ways and means of enabling the education system to facilitate national unity, mutual social responsibility, accelerated industrial and technological redevelopment, life-long learning, and adaptation in response to the country's changing needs in a global environment (Koech, 1999). Despite the efforts of the various previous commissions, the implementation of their recommendations had been uneven at best. The public perceived that the 8-4-4 education system was not delivering as had been anticipated when it was established. Major complaints included access, quality, equity, and the system's relevance to the needs of Kenyans, many of whom were unemployed even after completing a university education. In undertaking the challenging task before it, the Koech Commission adopted a comprehensive, multi-strategy approach to involve as many Kenyans as possible in its work. The Koech Commission report concluded that, like most other developing countries, Kenya faced the challenge of providing quality education to all Kenyans against the backdrop of a growing population and dwindling resources.

The Koech Report (1999) identified several major areas in which education had fallen short over the years since independence and described the consequences. Shifting policies kept education from attaining national goals, and the nation's

moral fabric was declining, along with quality in the vocational education sector. Poor coordination of education services among various ministries and too much centralization of decision-making in formal education services at the MOE hampered growth and development. The objectives of the 8-4-4 system of education were laudable but implementation was haphazard and lacking in several crucial ways, especially the initial failure to consult with crucial stakeholders and inadequate monitoring to ensure that educational personnel and institutions were prepared to implement it successfully. This led to poor rendering of the curriculum's practical orientation, requirements that most parents could not afford, lower enrollments, and high rates of dropout. Finally, poor linkages between educational institutions and industry had contributed to the lack of quality and relevance, along with a slow rate of employment creation. Some members of the public thought that all the problems associated with the 8-4-4 system of education would be solved by merely going back to the old 7-4-2-3 system. The Koech Commission members believed, however, that the required solutions went beyond mere structure. They saw a need to re-evaluate the goals and objectives of education in the Kenyan context. The existing Education Act was outdated because it neglected crucial areas of education including early childhood care, development and education, education for those with special needs, and the role of parent associations. The country needed to focus on providing the resources needed to build a comprehensive education system that would provide a high quality of education for all (Koech, 1999).

The Koech Commission proposed a new system of totally integrated quality education and training (TIQET), replacing previous structures titled according to the numbers of years of education at each level (Koech, 1999). TIQET, as a concept, embraced the values and the substance that should characterize an education system. It should be inclusive, accommodative, and life-long. It should approach the learning process in an integrated way, and it should contain inter-sectoral linkages with a logical progression between levels of education focused on quality of delivery and the outcomes of the education and training process. The commission recommended a new education act, new laws, and amendments to other laws related to education. The proposed TIQET system included several significant changes in the structure and organization of Kenyan education (Koech, 1999):

- Access to basic education would be expanded from 8 to 12 years; therefore every Kenyan child would eventually have the opportunity to attain at least a secondary education without restrictive selection at the end of primary school and burdensome cost
- Disparities in education (e.g., geographical factors, social issues, and gender) would potentially be eliminated by the provision of a universal and compulsory basic education over a planned period of time with special measures to address the needs of disadvantaged groups, especially those with special learning needs
- Opportunities would be expanded at the post-secondary level so that learners could flexibly pursue further studies

- A modular or unit learning approach would be introduced in post-secondary education. This would allow students to accumulate credits and transfer them from one institution or level to another and would facilitate various points for re-entry
- Opportunities for access to education would be increased through expanded alternative and continuing education
- A manageable curriculum content would be introduced at all levels of education, one that would not overburden the learner and educators

Kenyans lauded the Koech Report, calling it the most exhaustive and comprehensive review, one with recommendations that were both pertinent and timely (Sifuna, 2000). The recommendations were aimed at resuscitating the education sector by making it more focused, manageable, relevant, and cost-effective in response to the critical challenges facing the country and its education system. Though the government rejected the Koech Report (1999), arguing that it was too costly to implement, Kenyans urged the government to consider its recommendations. For instance, Sifuna (2000) argued that the government had a choice: either continue spending more resources in education (40% of recurrent expenditure, 8% of GDP) and achieving less, or spend more in the short term and less in the medium and long terms, thereby achieving more for individuals and the country as a whole.

Although the recommendations made by the education reform commissions during the Moi regime had led to decidedly mixed results, the Kenyan education system continued to expand between 1978 and 2002, with enrollments at both primary and secondary levels more than doubling (Table 1). The number of primary school teachers also doubled and the number of secondary teachers tripled during this period. By 2002, girls made up 49.3% of primary and 47.5% of secondary school students, up from 34.2% and 31.7%, respectively, at independence (Table 2). Gender parity, however, did not occur at the university level, with female enrollments increasing from just 27% of all students in 1992 to 37% in 2002 (Table 2). Another continuing problem was the low transition rate between primary and secondary school, with enrollments in grade 9 (Form 1) of secondary school just 40% of enrollments in grade 8 (Standard 8) of primary school (CBS, 2003).

President Mwai Kibaki (2003–present)

In 2003, as the country was still debating the Koech Report, a new administration came to power. A resounding victory by the National Alliance Rainbow Coalition (NARC) Party over the Kenya African National Union (KANU) Party made Mwai Kibaki the new president.

Table 2. Gender distribution in Kenyan education, 1963, 1992, 2002–2009 (% female)

Year	*Primary school students*	*Secondary school students*	*Teacher trainees*	*University students*
1963	34.2	31.7	-	-
1992	49.3	42.9	45.8	27.0
2002	49.3	47.5	47.8	36.9
2004	48.4	47.0	48.7	36.7
2006	48.9	47.0	48.7	39.1
2007	48.8	45.9	50.1	40.1
2008	49.1	46.0	48.7	40.1
2009	48.9	46.4	50.5	37.9

Sources: For 1963, 1992 data, Weidman (1995, Table 2); for 2002–2009 data, CBS (2007), NBS (2010).

Free Primary Education (2003–present). As a way of fulfilling its key major pre-election promise, the new government declared that primary education would be free to all. This was the third time that such a declaration had been made but only the second time it was implemented. During the Kenyatta regime, the provision of free education had lasted only a couple of years and was discontinued without fanfare after the government realized that it was too expensive. However, primary school enrollments increased by more than 50% between 1972 and 1974 (Table 1). During the Moi administration, school fees were not eliminated but the government did support the construction of new schools and enrollments continued to grow.

As is shown in Table 1, more than a million students enrolled in primary school after the fees were eliminated in 2003. Unfortunately, however, no proportional increase occurred in either the number of schools or the number of teachers. In fact, by 2006 the number of teachers had actually declined, despite enrollment increases at both the primary and secondary levels, raising serious concerns about the capacity of the Kenyan school system to maintain a high level of quality. Between 2002 and 2009 the number of students per trained teacher in primary schools increased from 34 to 52 (53%); in secondary schools the increase was even more striking, from 18 to 31 (72%).

In 2005, the first group of students enrolled under Kenya's universal primary education plan graduated, only to face a shortage of secondary schools. In 2005, 671,455 students sat for the Kenya Certificate of Primary Education (KCPE) examination, up from 587,961 in 2003. By 2007, the number of KCPE candidates had grown to 704,737 (Kenya School Magazine, 2010, paragraph 11.2).

Even though policy makers were aware that the secondary school system would face pressure to absorb the increased number of primary school leavers, not enough government funds were available to provide the number of places required. Consequently, less than half of the primary school graduates could be absorbed into the secondary school system. While some primary school graduates will be able to attend private secondary schools, the fees are prohibitive for the majority, who will be forced to drop out of the school system without completing secondary education. This crisis has caused a public outcry for free secondary education, as a secondary diploma is now considered to be the minimum required to gain employment in the formal sector.

In the years that the Kenyan government has experimented with free education, the Ministry of Education has consumed a disproportionately large share of the recurrent budget, thereby placing a strain on the resources available to finance other government services. Furthermore, free education was often provided at the expense of quality. For example, when free education was introduced during the Kenyatta regime, over a third of teachers were untrained (Gachathi, 1976, p. xviii), and schools were generally poorly staffed and equipped. The 2003 initiative resulted in huge increases in the student-to-teacher ratios for both primary and secondary education as well as severe crowding of existing facilities.

Policy makers continue to be concerned that free secondary education will only increase the logistical problems that free primary education has caused, among them shortages of qualified teachers, poor physical facilities, lack of teaching and learning resources, and overcrowding. By law, the government should provide every secondary school in Kenya with enough qualified teachers and sufficient physical resources. In reality, however, many schools are given very limited resources and are understaffed. Consequently, schools may be forced to recruit and pay for their own, often unqualified, teachers or even to go without resources completely. They raise funds through harambees (community fundraising events), and by collecting school fees. This is particularly common in poor and rural areas where schools are of low quality and public resources are severely limited. Recently, the government has provided block grants to communities as development funds that can be used according to local needs. Substantial portions of these funds have been spent to improve local schools.

KESSP: Kenya Education Sector Support Programme (2005–2010)

In 2003, the Kibaki administration demonstrated its strong commitment to improving education in Kenya by beginning to develop a comprehensive reform program, the Kenya Education Sector Support Programme (KESSP). Its underlying policy framework was laid out in 2005 in a sessional paper (Republic of Kenya, Ministry of Education, Science and Technology [MoEST], 2004, 2005). The policy framework focused on expanding access and equity, along with improving the quality of education across the entire Kenyan education system. It identified its main targets as improving the management and planning of several crucial areas: education and training, human resource management, teacher development and

utilization, information and communication technology, research and development, finance, and the enabling legal framework (MoEST, 2004).

KESSP lays out a sector-wide plan for educational improvement, with detailed objectives and new management structures for implementation based on more decentralized responsibility throughout the education system along with systematic monitoring and evaluation (MoEST, 2005). It also provides indicative costs, including the gaps between costs and expected government revenues that international donors were asked to fill. Initially, donors were quite enthusiastic, but serious concerns about corruption and mismanagement of funds led the World Bank and other donors to suspend KESSP support for a short time in 2009.

REFLECTIONS ON EDUCATION REFORM IN KENYA

The national commissions appointed over the past four decades to review the Kenyan education system illustrate the effort that government and other stakeholders have exerted in search of policy frameworks and strategies to make education serve the nation and meet the country's development needs. Without dramatic changes in the social, political, and economic environment under which policy on education is made, implementation will continue to be problematic. Different regimes have used education as an instrument for meeting or achieving other political ends. Education policy was often not geared towards meeting any specific educational objectives. Instead, post-independence policy makers, like their missionary and colonial counterparts, tended to use education to meet the aims of the ruling elites.

Despite the efforts by the various commissions to find solutions to Kenya's educational problems, the country continues to face major challenges of quality, equity, and access, leaving many questions unanswered. Perhaps the most important is this: To what extent does the latest government educational plan (KESSP: MoEST, 2005) represent a sustainable commitment by government, local communities, parents, and other stakeholders (including international donors) to improve access to educational opportunities? Further, how will this commitment fare in the face of the competing demands included in the current national development plan, Vision 2030 (Ministry of Planning and National Development [MPND], 2007)? And what conditionalities will the international donor community tie to its continued support for education, especially in the aftermath of World Bank withdrawal of support for KESSP in 2009? Corruption is a key concern that permeates virtually all aspects of the Kenyan educational system (Transparency International Kenya, 2010).

Many recommendations made by the commissions were either never implemented or were implemented with only partial success. Although the appointed commissions were well intentioned and included Kenya's most prominent educational scholars, their work had only limited impact. Successful implementation of the commissions' recommendations hinged not only on the political commitment and will of politicians but also on the availability of funds, both domestic and from international donors. Despite numerous efforts to make the

Kenyan educational system more responsive to both individual and national needs, it is still plagued with problems that have hindered its effectiveness in propelling Kenya along the path toward significant growth in economic and social development. By the 1990s, Kenyan education had stagnated or even deteriorated to its lowest levels (Abagi & Odipo, 1997; Abagi & Olweya, 1999), a situation that left many Kenyans wondering about the country's potential to ever achieve the objectives of Education for All (EFA).

The initiatives of the past decade, such as KESSP and Vision 2030, however, have moved education to the forefront of national priorities. Increasing attention is being paid to improving educational quality, retaining those aspects of the existing system that have functioned well, while also recognizing that all policies have consequences, both intended and unintended. The national examination system at the end of grades 8 and 12 has served to maintain a reasonably high level of quality in student learning outcomes while simultaneously serving as a gatekeeper for and limiting transition to subsequent levels of education. Hence, in the service of maintaining quality, access (and potentially equity) may be sacrificed. It is much easier to identify areas for improvements that might increase quality than it is to implement strategies to address them. The challenge of improving education quality leading to the social and economic benefits so needed in developing countries is complex. It requires systematic planning, political commitment, financial resources, and stakeholder involvement at both the national and local community levels. Kenya has admirably demonstrated the capacity to assess its educational system and formulate plans for reform that address both individual and national development needs. The continuing challenge is to find effective and sustainable avenues for implementing these plans in the future.

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GLOBALIZATION, DECENTRALIZATION, AND EQUITY

Post-Secondary English Language Policy in China

As English has spread through globalization, it has become a de facto lingua franca. Because adequate English competency is now considered a "global literacy skill", nations see it as essential if they seek to compete in the global market. As global university rankings, the drive for fiscal resources, and the international mobility of students become more common and significant among universities worldwide, training in English plays an increasingly important role in higher education systems.

In China, as elsewhere, learning English has grown in importance in the last 30 years as political and economic policy reforms have evolved within the context of globalization. Researchers have estimated that the number of Chinese people currently studying or speaking English is about on par with the total population of the United States, at between 200 million and 350 million people (Osnos, 2008). English has also come to determine who can get what others cannot, and to determine what access people can have to material goods, cultural and social capital, connections, and opportunities. For instance, university students are now required to pass English competency exams in order to graduate, and many employers prefer candidates with English language skills.

In this chapter, I discuss the policy context that led to the emergence of multiple models of English language programs in China, and consider the relationship between educational quality and equality of access. I show how the increased emphasis on higher education as a facilitator of China's national development has coincided with a strain on resources that requires new means for expansion, and demands new measures for quality control. I argue that as measures to control the quality of English language programming continue to compete with global forces, the economic market, and differential resources between and within regions, it is difficult to maintain equitable access to quality programming. Finally, I draw from various policy documents and scholarly analyses to provide an overview of the current English language policy context in China.

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 163–181.

BACKGROUND

Globalization, Quality, and Equality

Globalization includes the broad economic, technological, and scientific trends that have had an impact on all aspects of society, including education. Mok and Welch (2003) identify *economic* globalization as having the most profound impact on the public sector. Economic globalization is defined as a "global market operating across and among a system of national labor markets through international economic competition"; it is fueled through policies that advocate state withdrawal from the public sphere, along with privatization and localization (Astiz, Wiseman, & Baker, 2002, p. 67). This manifests as a less centralized form of public management. Economic globalization includes an ideological commitment to neo-liberalism, which holds that the state should not bear the primary responsibility for providing services that promote the public good; instead, such services should be enhanced through privatization and the market (Mok & Welch, 2003). Because such policies are advocated by supranational organizations that influence national education systems, such as the Organization for Economic Cooperation and Development (OECD) and the World Bank, economic globalization has had an impact on education systems around the world (Mok & Welch, 2003).

Martin Carnoy (as cited by Carnoy & Rhoten, 2002) has identified several impacts that this trend has had on education. Fiscally, governments are under pressure to reduce public expenditures and find alternative sources for funding educational expansion. At the same time, as markets expand across borders, governments need to attract foreign capital, which means producing an educated class of citizens with the specialized skills deemed essential for the new knowledge society, which is characterized by information technology and global communications; these skills include foreign language competence. Thus, nations need to develop a more educated citizenry, but must do so with fewer public funds. This situation results in privatization initiatives within the education system as well as administrative decentralization, where educational institutions are given more managerial autonomy to respond to the local environment.

Universities are at the forefront of the effort to develop skilled labor, but they too are experiencing what Mok (2009) refers to as "academic capitalization". As he describes it,

> Governments … are increasingly concerned about the role of education in improving competitiveness of their countries, and their place in regional and global markets, therefore they are…keen to promote the idea of 'lifelong learning' and 'quality education' in preparing their youth for the knowledge based economy. At the same time, these governments increasingly promote comprehensive reforms of their education systems … launching management-oriented reforms to improve education quality. (p. 16)

In sum, the increasing demand for education is accompanied by policy trends that promote a reduction in spending on public education. This creates the potential for

a strain on resources, which in fact may not ensure quality. Thus, it is a challenge to maintain a fair balance between greater educational access, quality educational programming, and equitable distribution of educational services.

Multilateral organizations with a focus on education have only recently begun to address the issue of quality in the discourse about education for all. UNESCO, for example, states that the challenge of achieving education for all implies not only equitable access to educational opportunities, but also equitable participation in quality education for all individual learners and groups (UNESCO IBE, 2008, p. 10). In short, having equal access to a quality education should be the privilege of all learners. However, Reisberg and Watson (2011) pose an important question: Does greater equity compromise quality? Altbach (2010) argues that as student populations expand they also become more diverse, and that education systems have not been able to keep up with demand. The result, he says, is a decline in quality: "The reality of postsecondary education, in an era of access combined with fiscal constraint and ever-increasing costs, is that inequality within higher education systems is here to stay" (p. 2).

English in Higher Education Worldwide

In pointing out the increasing importance of English language in higher education worldwide, Altbach (2007) notes that it is the most widely studied foreign language in the world. In addition, because English is the medium of most internationally circulated academic journals, universities in many countries are beginning to stress the importance of their faculty members publishing in them, which requires adequate English language competence. English language databases are also the most widely used internationally. Furthermore, he writes, English is the medium of instruction in many of the most prominent academic systems, and the majority of international students are enrolled in tertiary institutions in English-speaking countries.

English-medium universities exist in many other countries where English is not the predominant language, such as Kyrgyzstan and Bulgaria. In addition, in order to attract international students and improve the English-language skills of domestic students, many countries are starting to offer English-medium degree programs. In the fall of 2010, for example, Beijing Normal University launched an English-medium international master's degree program in comparative education that aims to attract international students and the tuition revenue they will bring.

Economic Reforms and English Language Policies in China

The enormous expansion of English language education in China is the result of a simultaneous convergence of factors within the context of globalization, in parallel with worldwide trends. Two reform policies have been especially instrumental in changing China's English language learning environment. These are China's Open Door Policy, which set the stage for private entrepreneurship and indirectly increased the desirability of English language skills, and educational

decentralization, which led to increased educational options, as well as new educational challenges.

China's Open Door Policy was initiated in 1978, when Deng Xiaoping, then the country's de facto leader, pushed to reinvigorate the centrally planned economy by introducing market forces and devolving centralized government control. The Chinese government encouraged private investment and foreign trade, and new opportunities emerged for private businesses to open. At the same time, increased foreign investment also led to the notion that English was important. These changes had not been possible during the years of Deng's predecessor, Mao Zedong, who advocated a planned economy.

As the centrally planned economy began to decentralize, the government's role in the educational sphere also changed. In 1985, the Chinese Communist Party called for the devolution of educational power to lower-level administrative units, encouraging local authorities to play a greater role in "education financing, provision, and regulation" (Lun & Chan, 2003, p. 82). The rationale was that local authorities would be better able to design curricula and introduce policies suited to their local needs and requirements (Kwong, 2003). Also, by allowing more autonomy to local governments and educators, the party hoped to alleviate some of the state's fiscal responsibility for educational planning (Kwong, 2003; Lun & Chan, 2003; Mok, 2003). Thus, starting from 1985, local governments were required to seek supplemental resources outside the state, in order to provide educational services.

Despite these changes, the central government continued to affirm its role in overall management and policy guidance, while the Ministry of Education remained responsible for the implementation of educational plans (Kwong, 2003). China's post-Mao leaders saw education as a key to economic development: English-language skills were fundamental to achieving the nation's modernization goals and catching up with the more technologically advanced western nations. English therefore also began to be more heavily emphasized as part of China's national curriculum. All of these factors converged through the 1980s and 1990s to create an environment that encouraged the rapid growth of English language learning programs in China.

However, implementing such policy directives uniformly across China has proved challenging. It has been widely reported that though China's economic development has been rapid, it has also been vastly uneven, with great variations across provinces in the available human, financial, and material resources. As local governments assume more of the responsibility for funding education, prosperous regions with robust economies have had more resources to invest in educational facilities, while poorer areas may have difficulty even paying teachers. For example, between 1991 and 1995, Hebei province spent 600 million yuan (approx. US $88 million) to develop new disciplines in its universities, while the Shanghai municipal government spent the same amount for the same purpose at just one institution, Fudan University (Kwong, 2003). This fiscal disparity has also complicated the process of offering quality English language programming nationwide.

ENGLISH LANGUAGE TEACHING IN CHINA

The first real surge in English language learning began in the early 1980s. The Open Door Policy enabled foreign investors, many of them native English speakers, to enter China on a larger scale than had been possible for decades. As the opportunities increased for Chinese people to interact with native English speakers, the English language also began to emerge as a tool for connecting with the political, economic, and technological powers of the west (Adamson, 2004). The economic reforms of the 1980s also dismantled the job assignment policies of the past. Chinese citizens were no longer automatically assigned positions by the state; instead, they could seek their own employment with private enterprises. Because jobs with foreign-run companies usually paid more than government-assigned jobs, those with knowledge of foreign languages, particularly English, had wider, and more lucrative, career choices. Knowledge of English also opened up opportunities to study abroad.

As these examples illustrate, mastering English brought individual benefits. Meanwhile, English language learning was also being emphasized at the national level as part of China's modernization goals. Toward this end, a national college English curriculum (NCEC) was developed in 1986; all university-level non-English majors were required to take two years of college English. The stated aim was to "develop in students a relatively high level of competence in reading, an intermediate level of competence in listening, and a basic competence in writing and speaking" (College English Syllabus Revision Team, 1986, as cited by Lam, 2005, p. 192).

In 1986, the National College English Testing Committee (NCETC) developed the College English Test (CET), a large-scale nationwide, standardized English proficiency test "to better inform the English teaching of non-English majors in the institutions of higher learning in China" (NCETC, 2011b). In sum, it was designed to assess the quality of tertiary-level English language courses.

The CET includes several separate tests, or bands. The first one, College English Test Band 4 (CET-4), is mandatory for tertiary students after the first two years of English study and tests their proficiency in listening, reading, and writing. Those who pass the CET-4 then face the College English Test Band 6 (CET-6), which can be taken after three years of English study. In addition, the CET-SET (Spoken English Test) is designed for college students who have passed both CET-4 and CET-6.

According to the NCETC (2011b),

> The objective of College English is to develop students' ability to use English in a well-rounded way, especially in listening and speaking, so that in their future studies and careers as well as social interactions they will be able to communicate effectively in both oral and written forms. In this sense, CET-4 and CET-6 are aimed at measuring precisely college students' comprehensive employment of English and thus play an active role in realizing the objective of college English teaching.

While most bachelor's degree candidates in Chinese universities are required to pass the CET-4, Chinese business employers prefer to hire those who have passed the CET-6 (Woodward, 2008), demonstrating the value of English language skills for employment purposes in Chinese society today.

In addition to passing basic English requirements, all non-English majors must also pass a subject-based English exam (SBE), which tests their English vocabulary in their major area of study. Also, more difficult tests designed for English majors (Test for English Majors, or TEM: Bands 4 and 8) are required for all university-level English majors at the end of their fourth and eighth semesters.

As further evidence of a national commitment to promoting English skills, in 2001 China's Ministry of Education issued a document requiring universities to provide 5% to 10% of the undergraduate course curriculum in English or another foreign language, within 3 years (Huang, 2007; Pan, 2007). The document encouraged universities to adopt textbooks published abroad in foreign languages, and to send younger teachers to international universities so they could learn to better utilize foreign languages for teaching and research. In 2007, the Ministry of Education announced the Regulations for Teaching and Studying University English Courses (*daxue yingyu kecheng jiaoxue yaoqiu*), which also requires that 10% of overall bachelor's degree credits be in English (Wu, 2007a). However, each institution is responsible to determine how to implement, and fund, such initiatives.

Since 2001, universities and colleges in China have begun to integrate more English language into the curriculum, but the range of use varies and opportunities are not distributed evenly. For example, in one classroom, the instruction might be entirely in Chinese with some supplementary materials in English, while another might have 70% of instruction in English, with only the most difficult points explained in Chinese (Huang, 2007).

Examples abound of the ways English language use has been infused into the curricula of higher education institutions located in the eastern urban areas of China where economic development has been the most rapid. According to Huang (2007), in 2001 a total of 54 courses offered at Qinghua University in Beijing were using English as a medium of instruction. Plans were also made in 2005 to incorporate teaching materials published in English-speaking countries into as many as 500 courses, within 3 years. By 2004, 62 teachers at Fudan University in Shanghai had been approved to teach courses using both English and Chinese, after they were offered financial incentives to do so and over 20% of courses in content subjects at Beijing University were using authentic English materials (Pan, 2007). Many universities throughout the country have also recruited native English speakers, as well as Chinese natives who received their graduate degrees abroad, to teach courses and offer lectures in English. However, Agnes Lam (2005) found that those who grow up in the coastal region of China experience better conditions for learning a foreign language than do those living in the interior.

Institutions in China's central and western areas have fewer financial resources available to invest in any educational programs, including English curricula. There are also fewer individuals qualified to teach in English in those areas, and fewer

opportunities to promote an English language-learning environment outside of the classroom. As reported by *The China Daily*, the 2006 Report on the Development of Labor and Social Security states the number of foreigners working in China had almost doubled since 2003, to over 180,000. However, the majority of those people were located in the large eastern cities of Shanghai, Beijing, and Guangzhou (China Daily, 2007). In many other areas of China, one might never encounter a foreigner; not surprisingly, these are also the areas where foreign language-learning opportunities are the fewest and perhaps the weakest. Yet, people still need some level of English language skills to reach the higher levels of education and the professions.

Xinhua reports, for example, that 6000 village schools in Jilin Province in Northeast China lack qualified English teachers. In these schools, English teachers are often self-taught and have had no formal training in teaching English (Zhang, 2007). In Qinghai, one of China's poorest provinces, there are so few qualified English teachers that Chinese teachers with only elementary English skills may be hired to teach English at middle schools (Shar Dzong Development Group, 2009). Even after four years of English study, students may not be able to speak or write a single English sentence, making it nearly impossible to pass any exams that would get them into university—let alone teach there.

China's ethnic minorities face special hurdles in learning English. Most English language textbooks in China are written for native Chinese language speakers, meaning that minority populations must first learn Chinese in order to gain access to English. As recently as 2003 there was not a single individual competent in oral and written Tibetan, the native language of Qinghai's largest ethnic minority population, who had earned a BA in English and was teaching English in Qinghai Province (Stuart & Wang, 2003). Furthermore, as most English textbooks in China are written in English with Chinese translations, China's linguistic minorities have a double burden: they must first learn Mandarin Chinese as a second language, in order to learn English as a foreign language. Beckett and MacPherson (2005) note that in areas where even basic education is underfunded, it is unlikely that trilingual education can be provided in three scripts, taught by qualified teachers. Linguistic minorities are required to learn Mandarin Chinese, but often they must choose between attending a school where they may formally study Chinese along with their mother tongue, or study in Chinese and learn English as a foreign language. Scholars have also noted that those who send their children to Chinese schools with English classes risk losing their native languages, cultures, and identities (Beckett & MacPherson, 2005; Upton, 1999). Yet many linguistic minorities live in economically disadvantaged areas and cannot afford private English lessons.

In addition, areas that are struggling to provide funding for basic education simply cannot afford the additional investment to provide English programs at the tertiary level. More than half of the colleges and universities in Liaoning province in northern China have not implemented any English curricula, because they lack qualified teachers and other necessary resources (Huang, 2007). In addition, although civil unrest and natural disasters may be rare, some occurrences in

economically depressed areas of China have amplified the challenge of providing a quality education. As the *New York Times* (Sichuan earthquake, 2009) reported, the 7.9 magnitude earthquake that hit Sichuan Province in 2008 killed about 70,000 people, left over 18,000 missing, and collapsed numerous schools. In the same year, as *The People's Daily Online* ("More than 300 innocent", 2008) reported, riots in Lhasa, Tibet caused 200 million yuan (about US $28 million) of damage to shops and public facilities, including seven schools. While such events may be uncommon, they require emergency funds—and then that money cannot be allocated to other educational purposes.

Even in areas where universities have made strides in providing English language teaching, the English teaching is generally not considered effective. The emphasis on passing the standardized tests, which are in fact designed to assess the quality of the English language curriculum, results in teaching to the test. Until recently, the CET has primarily tested reading skills and vocabulary; therefore the classroom emphasis has been on reading and writing, through rote memorization. The result is that many college graduates who pass the CET with very high scores actually do not have strong skills in spoken English (Lu, 2006). In fact, the China Youth Daily Social Survey Center surveyed nearly 10,000 people and found that 22.8% of participants admitted to cheating on their CET exams, and 33.8% claimed to have forgotten all their English once they had passed the test (Lu, 2006). This raises questions about the ability of the CET to validly measure the quality of the university-level English language curriculum.

It is also likely that few university students have the English language skills to follow a core curriculum of which 70% is conducted in English. Even within tertiary institutions that have incorporated English use into core subject areas, courses have been discontinued because so many students dropped out of them. For example, at Xi'an Jiaotong University, a school known for its high quality engineering programs, 200 students enrolled in a mathematics course that incorporated a Chinese-English curriculum. However, only 54 students remained in the course until the end (Huang, 2007).

Providing quality English language training at the university offers other challenges. Although the Ministry of Education developed the English language curriculum and most English teachers follow a single teaching syllabus, it may not meet the needs of different locales, and different kinds of university students (Industry Canada, 2007). In addition, the tertiary English curriculum is not tied to the secondary level curriculum. The result is both gaps and overlaps between the two English curricula, in areas such as subject matter, curricula, and textbooks (Industry Canada, 2007).

Finally, inequality exists in the access to higher education. Most of China's top-tier universities are located in its eastern coastal regions. In October 2009, the Ministry of Education supported the formation of the C9, an academic conference comprised of nine of China's most prestigious universities; it is now being referred to as China's Ivy League. Two of these universities are in Beijing and two in Shanghai, and the others are located in various capital cities, none further west than Xi'an in central China. Because most universities in China give priority to students

from their own region, it is more difficult for secondary school graduates in central and western regions to gain the highest quality post-secondary education. In fact, Beijing, Shanghai, and Liaoning Province account for 37% of all post-secondary students in China (Industry Canada, 2007).

ENGLISH AS A COMMODITY

If university students must pass one English exam to graduate and another to get a job, what do they do if their options for improving their English are poor or limited? This dilemma has stimulated the demand for English language training, which is now blossoming into a 15 billion-yuan (approx. US $2,360,000,000) industry in China. That figure is "equal to the annual production output of a mid-sized city" (English training, 2006). That figure is also predicted to double.

Woodward (2008) estimates that each year, 2 million Chinese students take the government-regulated standardized English examination to demonstrate proficiency in English, but the courses provided by the universities do not always enable them to do so. At the same time, the decentralization of the economy has encouraged the proliferation of private institutions devoted to EFL education. Thus the growth in demand for English language training corresponds to the growth in China's economy, the increase in foreign investments, and the growth in the hospitality and tourism sectors (Industry Canada, 2007).

China's key foreign language markets are mainly concentrated in cities such as Beijing, Shanghai, and Guangzhou, which are seeing the most economic growth and foreign presence. Events such as the Beijing Olympic Games (2008), the World Expo (Shanghai, 2010), and the Asian Games (Guangzhou, 2010) have also stimulated the private English language market in these cities as they prepare for internationally attended events. Before the 2008 Olympics, Beijing's mayor promised that 600,000 of the city's residents would speak "moderately fluent" English by 2008, and regulations were passed requiring civil servants, as well as 80,000 taxi drivers, to master basic English skills (Industry Canada, 2007). The mayor also required 80% of police officers under age 40 to pass an elementary oral English exam. This demonstrates the importance of English ability for a wide variety of professions, including unskilled workers. In Shanghai, the municipal government also launched campaigns to encourage citizens to study English in anticipation of the 2010 World Expo.

The combination of dissatisfaction with the campus English language curriculum and the great demand to learn English, coupled with limited foreign language opportunities for some, has resulted in a proliferation of privately run English language programs, offering English skills as a commodity. According to the Social Survey Institute of China (SSIC), there are now over 50,000 English training organizations throughout China, which cater to a wide variety of demands (Lu, 2006). These include improving test scores, expanding business English vocabulary, and becoming more proficient in speaking skills. Over 2,000 English training institutes exist in Beijing alone, with an annual turnover exceeding $287

million (Industry Canada, 2007). In Shanghai, 300,000 people spend up to $143.5 million annually on foreign language training.

The SSIC survey found that the two best known and most popular English language training programs were Beijing New Oriental School (BNOS) and Crazy English, both founded by Chinese entrepreneurs. BNOS has been publicly traded on the New York Stock Exchange since 2006. In its initial public offering filed with the U.S. Securities and Exchange Commission in 2006, BNOS claimed a net income of RMB 770.3 million (US $96.1 million), 94% of which came from revenue from educational programs (New Oriental Education & Technology Group Inc., 2006). At the end of the first fiscal quarter of 2011, New Oriental announced a 41.4% year-over-year increase in net revenues, from US $192.3 million to US $272.0 million (PR Newswire, 2011).

New Oriental (2011b) appeals to a very large market by offering courses that are specifically designed "to prepare students for the major exams used by educational institutions in China and abroad". These tests include the SAT, GRE, TOEFL, CET-4, and CET-6, as well as the National English test for entrance into master's programs, and the *gaokao*, China's university entrance examination, which is required for admission to most bachelor's and associate degree programs at Chinese colleges and universities.

In addition, New Oriental (2011a) has a wide reach: a network of 55 schools, 488 "learning centers", 29 New Oriental bookstores and over 5,000 third-party bookstores, and over 13,500 teachers in 49 cities, as well as an online network with over 6.8 million registered users. However, of these myriad facilities, only two are located in ethnic minority autonomous regions: one each in the capital cities of the Xinjiang Uyghur and Inner Mongolia Autonomous Regions, as Figure 1 shows. In fact, New Oriental's 2006 IPO filing stated that two-thirds of its revenue was derived from only four major cities: Beijing, Shanghai, Guangzhou, and Wuhan. This demonstrates the challenge for individuals who attend tertiary institutions that are already struggling to provide quality English language instruction, as the alternatives may be limited in some areas.

Others may face additional barriers to learning English. According to Dwyer (2005), the PRC government shut down private English instruction in China's northwest province of Xinjiang altogether in the mid-1990s. Xinjiang has a large population of Moslem minority groups, and the concern was that private schools could become channels for anti-government political propaganda.

Another well-known and privately run English training program, and perhaps the most unusual, is Crazy English. Li Yang, an engineering student from Xinjiang, and a graduate of Lanzhou University, founded the program in 1994. His Crazy English approach includes lecturing to mass audiences, during which he motivates audiences to practice shouting out inspirational sentences as well as patriotic sentences such as "Conquer English to make China stronger" (Osnos, 2008).

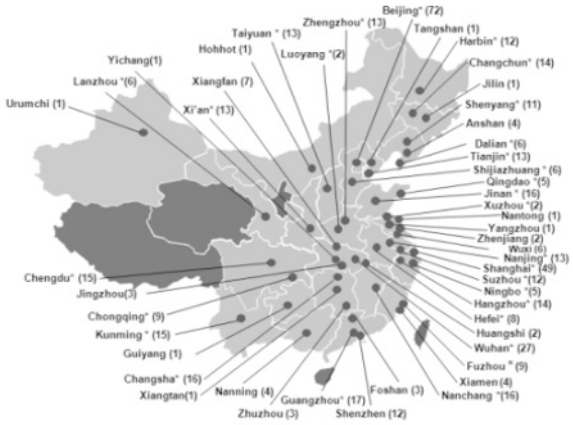

Figure 1. Location of New Oriental Schools
Source: New Oriental (2011a)

In the recent past, Li's audiences have been so large that his supporters have compared him to Elvis Presley, and his detractors have compared him to Hitler. He holds lectures in arenas, to crowds of over 10,000 people—though the list price for a "diamond degree" ticket, which includes small-group sessions with Li, is US $250 a day, more than a month's salary for the average Chinese worker (Osnos, 2008).

In spite of the very large crowds that Li attracts, critics remain skeptical: Do his methods succeed in improving anyone's English, given that he lectures primarily in Chinese (Osnos, 2008)? Nonetheless, as of 2002, he had already lectured to over 20 million people in China, Japan, and the Republic of Korea (Zhan, 2002). Once quoted as saying he wanted a retail chain of "Crazy English" schools like Starbucks, Li is among the most famous and wealthy people in China. In addition, Li travels, providing opportunities to participate in live "Crazy English" lectures at different locales. This makes his English lessons more accessible than many others. And students can purchase Crazy English products, such as books, audiotapes, and CDs, to study at home.

The popularity of these two programs, regardless of their unproven educational quality, can perhaps be explained by a market survey by the Canadian Embassy on China's English language industry. It found that consumers generally have limited knowledge about the differences between foreign language training institutions. People from low- to medium-income households, who are the least informed, tend to pay more attention to the price and branding of the English language programs that are offered because they do not speak English and cannot judge the quality of the education. Meanwhile, individuals from medium-high to high-income households are more likely to pay attention to the quality of the programs and the

teachers, and the perceived price-value ratio is also very important in making their decision. The researchers found that six factors were decisive in China in selecting an English language program: price-to-value ratio; quality of teachers; branding, image, and reputation; proven results and certificates; curriculum; and facilities (Industry Canada, 2007).

Thus while consumers consider many criteria when selecting an English language program, quality may or may not be among them. Therefore competition does not necessarily result in higher quality educational programming because the market may not demand it, especially when prospective students have insufficient information. Furthermore, while market forces may drive change, that change may have no impact on an organization's academic performance (Reisberg, 2011).

FOREIGN INTEREST

With the obvious financial success of private local companies offering English language programming, it is not surprising that foreign enterprises have also wanted to get involved in the industry. After it joined the World Trade Organization, the Chinese government revised legislation to allow overseas institutions to offer education programs in China (Mok, 2009). On September 1, 2003, the State Council implemented the Regulations of the People's Republic of China on Chinese-Foreign Cooperation on Running Chinese Schools. These regulations outline the necessary procedures and documentation for operating educational programs within Mainland China, including application procedures, leadership and organization, financial management, and supervision. These procedures also apply to entities wishing to set up Chinese-foreign cooperation on language training. Approval for such programs is required from either the central or the local education authorities, depending on the type of program.

Among the key points in the regulations are that all cooperative education activities must be conducted on a non-profit basis, and any revenue earned should be primarily used for educational activities and to improve teaching facilities. The regulations also include requirements for teacher credentials, course materials, administration and management, and diplomas. (A summary of key points is attached in the Appendix.)

In an effort to maintain quality, the document also states the types of cases in which such an educational entity could be terminated. Article 56 specifies that if a Chinese-foreign cooperatively-run school "causes gross adverse impacts due to its poor management or inferior educational and teaching quality", the appropriate administrative department shall "order it to make rectification within a prescribed time limit". If the situation cannot be improved, or is not improved, within the time limit, or the requirements are not met, the appropriate administrative department can revoke the permit.

While these regulations specify that educational activities should be conducted on a non-profit basis, language-training programs may also be set up as purely commercial entities. In fact, the Canadian embassy researchers (Industry Canada, 2007) recommended this as a way to circumvent the approvals required by

educational authorities for non-profit educational institutions. Such entities will also avoid having to adhere to the quality guidelines outlined in the regulations.

Although the process is quicker, a commercial entity is not allowed to recruit students publicly and may not issue a state-recognized degree or diploma. However, the same Canadian embassy study also revealed that some organizations wishing to establish educational businesses in China had used donations in kind as an effective government relations tool for expediting the approval process. For example, when Wall Street English (China), a subsidiary of Pearson Education, met difficulties obtaining legal registration in China, it offered a year-long English training course to eight vice ministers with Ministry of Education support (Industry Canada, 2007). Wall Street English (China) now has 39 centers in Beijing, Shanghai, Guangzhou, Shenzhen, Tianjin, Qingdao, and Hangzhou. This example illustrates that although policies are in place to regulate the quality of educational programs offered by foreign entities, there are also ways of operating outside these regulations. Such strategic tactics may result in compromising the quality of educational programming.

NON-GOVERNMENTAL ORGANIZATIONS

Because the government lacks the resources to deal adequately with the social and environmental consequences of the economic reforms, it has opened up some space for the existence of NGOs (Edele, 2005). This has facilitated another avenue for English language training, and several international NGOs now offer English language training programs in remote or rural areas of China where English language learning options are fewer. Because these programs do not depend upon student tuition as a revenue source, they have the potential to provide an alternative to current English language training offerings for poor or disadvantaged students. However, individuals have little control over the programs offered in their vicinity, so such programs do not necessarily expand their options on a wide scale. In addition, such programs usually depend upon foreign financial support and personnel, and therefore are usually not sustainable.

For example, the Trace Foundation is a non-profit NGO that provides considerable amounts of English language training with one particular community, the Tibetans. Founded in 1993 by Andrea Soros, the daughter of philanthropist George Soros, Trace has invested nearly US $50 million in Tibetan communities to date since its inception. Because English teachers are in short supply in Tibet, Trace has, since 1999, supported Tibetan students in training to become English teachers.

In 2004 Trace began a five-year initiative to improve the availability and quality of English instruction in Tibetan regions by providing English teacher training and instruction material in Qinghai, Gansu, and Sichuan provinces. The Tibetan English Teacher Training Project (TETTP) seeks to improve the availability and quality of English instruction in Tibetan-medium schools by supporting teacher training degree programs, placing native English-speaking teachers in teacher

training programs, and increasing access to English language resources (Trace, 2008).

Although currently no laws cover the activities of international NGOs in China, the government regulates them very closely and requires all NGOs to be sponsored by a government or party agency in a relevant field (Edele, 2005). For this reason, NGOs in China are commonly referred to as GONGOs, or government-organized NGOs. Many international NGOs find it simpler to cooperate with a local Chinese organization and not establish their own legal existence, rather than go through the legal process of becoming established in China. It is therefore difficult to know how many international non-profits are actually operating in China, and what impact they might have. However, any entity that is not legally registered would have difficulty setting up office space or a public account for donations (Edele, 2005). Therefore, non-profits sometimes register legally as private enterprises; as discussed above, this is less complicated and subject to far less oversight.

OTHER ALTERNATIVES

The Chinese government continues to take many positive steps toward addressing the issues that keep a quality education from being available to all. In 2007, the Ministry of Education announced that the state would invest 2.5 billion yuan (approx. US $393,098,000) to improve the quality of teaching in universities. Two key measures focus specifically on improving conditions at disadvantaged universities: circulating information on teaching conditions in universities, and offering educational aids to higher educational institutions in west China (Wu, 2007b).

China has also embraced distance learning to promote education and reach remote populations. As of 2011, over 400 million Chinese people were using the Internet (Internet World Stats, 2011); online institutes had been established at 69 Chinese universities by 2006, offering 140 different programs in 10 disciplines (MoE, 2004). According to Chen, Chen, and Wang (2009), the number of students enrolled in online colleges exceeds three million. China's government gives grants worth about $10,000 to professors at dozens of universities to help them improve their undergraduate teaching materials and then put them online so that less prestigious institutions can benefit from the country's best instructors and improve their own courses (Ajula & Terris, 2009). Since 2004, Jilin Province has promoted a distance education program to provide English teachers in the villages with online English lessons to help their teaching, and to improve students' English language skills (Zhang, 2007).

Several foreign entities have also collaboratively offered online English language programming with Chinese partners. Among the first was a joint initiative between the Higher Education Funding Council for England and the Chinese Ministry of Education. Teaching English as a foreign language and English for bilingual teaching were among the foci of the program, which was implemented with selected British and Chinese universities.

Most of the private English language companies also offer language training software for use at home, which typically costs less than the courses. Of course, students need access to both computers and the Internet to maximize such resources, and this remains problematic in many rural areas. In 2010, Internet penetration in Beijing and Shanghai was over 60%, as compared with only 27.9% in rural areas (CNNIC, 2010). Furthermore, even today, slow connectivity continues to pose problems across the nation.

The Ministry of Education has also experienced difficulty assuring the quality of e-learning programs. Since 2003 it has carried out annual quality assurance evaluations of online institutes; however, the rapid expansion of enrollments in online programs has resulted in a shortage of quality teaching resources and personnel skilled in utilizing educational technology.

CONCLUSIONS

Globalization has facilitated a context in which English language learning has become far more important in China. As a result, policies have been passed requiring universities to dedicate a proportion of their subjects to English, and students are required to pass standardized English language exams that measure the quality of the programming offered. At the same time, following the neo-liberal economic policies that have become prevalent worldwide, the environment for private and non-profit English language program offerings in China has developed in the past thirty years, even as educational funding has been decreased at the national level.

On the one hand, the proliferation of private enterprises offering English classes means more choices for post-secondary students who wish to improve their English skills, but do not find the courses offered at their university satisfactory in facilitating this goal. On the other hand, most private English language programs are offered in large cities, especially in the more developed eastern coastal regions where there are more foreigners, and demand is highest. This means that those in areas with fewer public resources to invest in English language programming will also have fewer private alternatives to select from. Moreover, leaving the market to regulate the quality of educational programming will not necessarily produce satisfactory outcomes; as researchers found, people from low-income households who are least able to judge the quality of programs often pay the most attention to marketing when making selections. The continued success of Crazy English, whose program quality has been questioned by linguists and scholars, also makes this point clear.

While the Chinese government has put regulations in place to govern the quality of English language programs supported and funded by non-profits, NGOs, and other institutions, such entities have been known to circumvent the regulations to gain quicker access. In addition, such organizations do not provide a sustainable model for offering English language programming unless they can be supported by local revenue over the longer term. As with other aspects of education in China, remote populations also continue to depend upon the programs they can access.

Even as access to English language programming expands through the private and non-profit sectors, expanded access does not ensure equity. Reisberg and Watson (2011) also note that most educational expansion occurs at less prestigious colleges, new private institutions, and through online providers, not at the most elite tertiary institutions. This is also the case in China.

As a nation going through a profound social and economic transformation, China will continue to face challenges in providing quality education for all. It is predicted that by 2020 China will have 35 million students enrolled in higher education, and globalization ensures that the quest for English language skills is an irreversible trend. There will be no one-size-fits-all solution to address the vast needs, yet new challenges bring new opportunities. In widening access, it is also essential to strengthen quality control measures, but as educational quality continues to be an important goal, new approaches to do so will also likely emerge.

APPENDIX A

Regulations of the People's Republic of China on Chinese-Foreign Cooperation on Running Chinese schools:

1. Chinese-foreign cooperative education activities should be conducted on a non-profit basis, and both the Chinese and foreign cooperating parties should be educational institutions. Religious organizations are not permitted
2. Chinese-foreign educational cooperation requires a Board of Directors or Management Council, or, in the case of non-legal entities, a Joint Management Committee. The board, council, or committee is responsible for organizing and administering the institution in accordance with the regulations. At least half of the board must be Chinese citizens. One third of the members must have at least five years of experience in the field of education and teaching
3. The principal authority must be a Chinese citizen, must love the motherland, and is subject to the approval of authorities
4. Foreign teachers and administrators must hold at least a bachelor's degree plus at least two years of relevant experience. A certain number of foreign teachers must be sent from the cooperating foreign educational institution
5. Courses, teaching materials, and enrollment plans and brochures must be submitted to the approval authorities
6. Any diplomas, degrees, or certificates awarded must be granted in accordance with the relevant provisions of the state
7. Any revenue earned should be primarily used for educational activities and to improve teaching facilities
8. The relevant education administrative departments of the people's governments of the provinces, autonomous regions, and municipalities directly under the central government shall be responsible for overall planning, comprehensive coordination, and macro control for all Chinese-foreign cooperative activities in running schools within their respective administrative regions

A complete version of the regulations is available at:
http://www.chineseeducation.ca/htmls/edu/07.html

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EDUCATION QUALITY

Its Meanings in Chile

The standardized learning achievement tests applied in Chile during the last two decades have been extremely useful to those designing the educational policies intended to improve education in the country. They have made it possible to identify critical issues related to quality and equity and to drive systemic solutions to those problems. These tests have also had an important influence on the way the concept of education quality has been understood and utilized in Chile. Their results are used in most of the public discussion on education and they have become the main tool for evaluating the quality of education in the country.

This influence started in 1990, when education quality, as a policy issue, began to be relevant in Chile. In that year the country began its transition to democracy after seventeen years of military rule, and the new democratic government defined education as a strategic means for achieving economic development, and creating a more socially just and integrated society (Cox, 2004). Given this focus on education, the first step was gathering data needed to make an accurate diagnosis of the Chilean education system; it was found to have relatively good coverage, but was very deficient in quality. A recently created national system for evaluating learning achievement called SIMCE (Sistema de Medición de la Calidad de la Educación) found that primary students, especially those from disadvantaged socioeconomic conditions, performed poorly on standardized tests of math and language; their average test scores were only around 50%. These results, along with other indicators, like the conditions of school infrastructure and working conditions for teachers, forced the new democratic government to declare in 1990 that the main problems of Chilean education were quality and equity.

Most, if not all, of the policy initiatives of the successive governments have established the explicit goal of overcoming the major problems found in education, but education quality has still not been officially defined. Discussions by stakeholders around this concept have focused almost exclusively on learning achievement.

To what extent have these tests determined the concept of education quality used in Chile? What real meaning does this concept have for educational stakeholders?

Our objective in this chapter is to explore what education quality means in Chile. To accomplish this goal we first review the literature on this topic, to

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 183–196.

construct a simple conceptual framework. Then, we examine the way that standardized learning achievement tests have been interpreted in terms of quality. Finally, we review some of the main education reforms undertaken thus far, both those shaping intervention programs and those changing the legal framework that regulates education. They reveal the idea of education quality that the country's officials, and society in general, have been attempting to pursue.

EDUCATION QUALITY: A COMPLEX CONCEPT

There is a progressive consensus across countries regarding the importance of including children's access to good-quality education in human rights declarations (UNESCO, 2004), but "there is much less agreement about what the term means in practice" (p. 29). This is because quality can be defined and evaluated according to the different goals that a society seeks to accomplish through education. Avalos (2003) distinguishes two groups of education goals: one emphasizes a "utilitarian" end, which "considers education as a tool for economic development" (p. 1), and the other emphasizes a broad human development end, "oriented towards human, personal, and social development" (p. 2). In the first group of goals the state's interests prevail over those held by individuals, and people are educated to be "human capital" in order to benefit the country's development. In the second group we find goals more related to personal growth, like the improvement of artistic and emotional skills.

In addition to Avalos' description of education quality, Barrett, Chawla-Duggan, Lowe, Nikel, and Ukpo (2006) distinguish two dominant traditions within education-quality discourses; they reviewed the literature to identify notions of education quality in the context of low-income countries and disadvantaged groups within those countries. First, they describe the "economist" view of education, where quantitative, measurable outputs are used as a measure of quality: "For example, enrollment ratios and retention rates, rates of return on investment in education in terms of earnings and cognitive achievement as measured in national or international tests" (p. 2). The other tradition is the progressive/humanist philosophy that tends to place more emphasis on educational processes: socio-emotional development, values, self-regulation, passion for learning, and collaboration, among others.

In both the economist and the humanist traditions, cognitive development is "identified as a major explicit objective of all education systems" (UNESCO, 2004, p. 29). This is so for several reasons, in addition to the intrinsic importance of cognitive development. Measurement is an essential part of any public policy and the measurement of cognitive development and learning is relatively easy, compared to other objectives associated with education quality, such as attitudes and cultural and moral values. Policymakers and top authorities need quantitative data to develop policy. Stone (1997) asserts that defining a policy problem is a matter of observation and arithmetic, so that "one common way to define a policy problem is to measure it" (p. 163).

Because measurable attributes are so important for the policy arena, learning achievement scores are placed in a privileged position as effective indicators for evaluating and diagnosing education quality, along with enrollment rates, availability of instructional materials, education infrastructure, normalized measures of teacher quality (e.g., certification level), and education efficiency rates. Moreover, treasury and finance ministries need to gather appropriate and convincing evidence so they can evaluate the effectiveness of public expenditure. That evidence is mainly delivered by education management information systems and tests of learning outcomes (OECD, 2007).

Hence, policymakers, analysts, and other stakeholders use measurable attributes to discuss and measure education quality in terms of achieving educational objectives, especially those referring to human capital development. A high-quality educational system is said to contribute to the nation's human capital: the knowledge and skills the adult population has to contribute to the country's economic and social development, and to their own income and social wellbeing. No doubt, this is a hard concept to measure. In practice, human capital is usually measured by how educated people are: what percentage of the adult population has tertiary, secondary, or primary education, or the number of years the average adult has attended school. In other words, access to education (input) is commonly used as a proxy for an educational outcome (the knowledge and skill base of a society).

WHAT DOES EDUCATION QUALITY MEAN IN CHILE?

An Answer from the Standardized Assessment Tests

In this section we describe the concept of quality that emerges from the large-scale assessment programs operating in Chile. The country has a strong evaluation system to monitor the quality of education at the local, national, and international levels. SIMCE, the national evaluation system mentioned earlier, has existed since the 1980s, and was the pioneer in educational evaluation in Latin America. Since the 1990s, Chile has participated regularly in international assessment programs. Both the national and the international assessment programs provide a rich array of indicators that are the primary source to judge educational quality. In this section we analyze this array of indicators, and the indicator system, to outline the underlying concept and definition of quality.

SIMCE was created to monitor the quality of education. It measures student achievement in language (Spanish), mathematics, and the sciences. Yearly, it assesses all students at two grade levels: Students in grade 4 are tested every year, and students in grades 8 and 10 are tested every other year. Overall, around 500,000 students are tested every year. Achievement is measured with paper-and-pencil tests that include both multiple choice and open-ended responses. The tests are criterion referenced and are based on the national curricula. Key quality indicators are the percentage of students reaching the curricular standards and the

increase or decrease in the average national scores. SIMCE results are provided at both the national and school levels, and school rankings are widely publicized.

In Chile the quality of education is also monitored through international assessment programs and educational quality is mainly understood as Chile's relative standing compared to other countries. Since the 1990s, Chile has participated in three sets of tests. The first is the Laboratorio Latinoamericano de Evaluación de la Calidad de la Educación (LLECE, Latin American Laboratory for Evaluating the Quality of Education), offered by UNESCO in 1997 and 2006. The second is the Trends in International Mathematics and Science Study (TIMSS), offered by the International Association for the Evaluation of Educational Achievement (IEA) in 1998/9 and 2002/3. The third is the Programme for International Student Assessment (PISA), offered by the OECD in 2000/1, 2006, and 2009. These programs measure what the countries consider important for students to know at different grades, ranging from grade 3 to 10. They use paper-and-pencil tests with both multiple-choice and open-ended questions. They usually report country-level average scores and rankings, the percentage of students reaching different proficiency levels, and trends in performance.

The results of most recent national and international assessments show some important improvements in student performance. In PISA 2009, Chile showed the largest increase in reading scores between the years 2000 and 2009, compared to all other countries. Chile also had the best overall performance compared to other Latin American countries. However, student performance is still far below curricular expectations and far below the performance of students from more developed countries. The results also show significant inequalities in performance between students of low and high socioeconomic status (SES).

These assessment results have a strong impact on the discourse about poor quality education in Chile. Hence, to understand what is meant by quality, it is useful to analyze the set of assessment indicators that are regularly used to judge quality. What are the main indicators and how are they interrelated? What definition of quality underlies this indicator system? How does this definition fit the quality definition of reform programs in Chile? We address these questions in the following sections.

Education Focused on Learning Results

Here we describe quality indicators that are commonly used in the large-scale assessment programs. These indicators can serve to judge quality in both relative and absolute terms. Quality education implies securing the necessary conditions to promote learning. Assessment programs measure student attitudes, teacher quality, school resources, curriculum coverage, and other important factors that can promote learning at school.

Relative indicators of student achievement. The main quality indicator that emerges from the large-scale assessment programs is the average achievement score, which represents how much the students know and what they can do with

that knowledge. Achievement scores are reported at different levels; from the perspective of the media and the public, the most relevant are the national and school levels of aggregation. Average scores must be compared to other scores to make sense. Hence, they are quickly transformed into various kinds of rankings: between countries, between schools, etc. Thus, quality is understood in relative terms, meaning the achievement of a relatively good standing in the rankings. Since PISA and TIMSS have systematically presented Chile as being at the bottom of the country league tables, the idea of poor educational quality is widely established in the country.

SIMCE results are also a primary source for school rankings in Chile. Lists of "top 10 schools" are widely publicized, suggesting that these are the best (or highest-quality) schools in the country. There are special rankings for middle-SES and low-SES schools, as well as separate rankings for private non-subsidized schools (elite, private, fee-paying schools).

Average scores are also used to make direct comparisons between relevant units of analysis: Chile versus other Latin American countries, public versus private schools, schools serving children of the same SES levels, and so on. Quality is a matter of having a better score than the comparison unit. LLECE has pointed out that Chile's school system has a relatively good standing compared to other Latin American countries, with the exception of Cuba, which was the only country that scored more than one standard deviation above the mean in the 2006 LLECE (Mineduc, 2008). Unfortunately, LLECE results have received little media coverage, and thus have been kept out of the educational debate.

The quality indicators described above are all cross-sectional: They compare scores collected at the same moment in time. Another way to understand quality is to look at trends in achievement across time. In trends analysis, quality is also understood in relative terms, but relative to itself; for example, one could compare grade 4 scores for different years. Along with the rankings, another key quality indicator is differences in achievement scores over time. When SIMCE results are released, changes in national average scores receive special media coverage.

Comparing scores from different cohorts of students involves another problem: The groups may differ in important ways that affect achievement. For instance, a threat to validity arises when one compares grade 10 achievement scores for one student cohort that includes 80% of the relevant population and another that includes 90%. Hence, increases in student enrollments have led to validity problems in efforts to compare average scores across time.

To deal with this problem, SIMCE has been piloting a value-added program: The same cohort of students is tested at different points in time. Here, quality is understood as how much the students learn while they progress from one grade to the next. More specifically, how much do they learn beyond expectations, assuming normal rates of child development?

Absolute indicators of student achievement. Criterion-referenced indicators facilitate judgments about quality based on a given score (cut-off point), threshold, or standard that is set according to curricular expectations. Stated another way,

quality is judged based on what the students should know and not on how the students do relative to others. The SIMCE results for 2007 showed that 35% and 41% of grade 4 students had not mastered basic skills in language and math, respectively. Analyses of TIMSS scores have shown that while fewer than 5% of Chilean 8th graders have mastered advanced skills in math, most of them (around 85%) do have low skills in this subject (Mineduc, 2004). Criterion-referenced indicators are more relevant from an educational standpoint: Teachers can use them as a guide to plan what to teach, taking their students' achievement levels into account. While trends in achievement levels are regularly reported by assessment programs, their high complexity relative to average scores seems to have removed them from media attention.

Basic Conditions to Enhance Education

The large-scale assessment programs report background indicators (e.g., student attitudes, school climate) that facilitate a better understanding of student achievement. These indicators are measured because they are an important way to reach the ultimate goal of student learning, but they are seen as secondary in importance to achievement. In contrast, other reform programs focus primarily on improving progress on these indicators. These background indicators are seldom, if ever, discussed in the media; their analysis is usually restricted to educational specialists.

A strong teaching force. Assessment programs measure teacher qualifications, years of experience, mastery of the curriculum, and other factors to judge the quality of the teaching force. For instance, analyses of SIMCE and TIMSS results have found that the teaching force in Chile is old by comparison (50 years on average), and that teachers feel less prepared to teach the curriculum than teachers from other relevant countries.

Good opportunities to learn for all students. The official curriculum discusses the importance of all students having such opportunities. The 1999 TIMSS showed that the Chilean mathematics curriculum covered fewer topics, and was less demanding and less precise than the curricula in other countries. This weaker curriculum translated into poorer opportunities to learn at school: while Chilean teachers covered basic math skills, teachers in higher-performing countries were covering advanced math—geometry and algebra (Ramírez, 2006).

Good school infrastructure and access to technology. Assessment programs ask school principals if they have the required buildings, textbooks, and services (e.g., heating, water) to serve their students adequately. Access to and use of technology to support learning have received special attention in recent studies. Commonly-used indicators are the percentage of schools with access to the Internet and numbers of students per computer. For example, the IEA International Computer

and Information Literacy Study (ICILS) 2013 is examining student skills in computer and information literacy across countries. A positive attitude toward learning and school is crucial if students are to perform well academically. Accordingly, student attitudes are considered an important indicator of educational quality. TIMSS reports the percentages of students who have positive attitudes toward math, science, teachers, and schooling in general.

Education focused on personal and social development. Schools are also expected to contribute to the development of responsible citizenship, ensuring democratic values. The IEA's Civic Education Study (CIVED) focused on the contribution the school system can make to this and other aspects of personal and social development. Similarly, the IEA's International Civic and Citizenship Education Study (ICCS) investigates the ways that a range of countries prepare their young people to take on their roles as citizens. Chile began participating in this project in 1998, and in October 1999 Chile surveyed its 8th grade students on a range of topics, from their knowledge of fundamental democratic principles, to skills for interpreting political information, to their attitudes toward government, and their willingness to participate in civic-related activities. The main conclusion of this study was that Chilean students are significantly above the international mean on their civic engagement and attitudes, but they scored significantly lower than the international mean on civic knowledge (Schulz & Siebberns, 2004).

While everyone would agree that personal and social development is a critical outcome of a quality school system—and it was included in the Chilean education reform of the 1990s—it is also true that this dimension does not receive a great deal of attention. This is a good example of an important aspect of the educational system that does not receive deserved attention because of limitations in measurement. Thus we see the conflict between what is important and what can be measured.

Education Focused on Human Capital

In Chile, human capital (e.g., access to education) has been improving considerably from one generation to the next. Of adults aged between 55 and 64, only 30% completed secondary education and 8% attended a third-level institution or completed a degree there. Among those aged between 25 and 34, however, 63% completed secondary education and 17% attended a third-level institution (OECD, 2005, p. 28).

In their report on human capital in Chile, Brunner and Elacqua (2003) provide a wide array of educational coverage indicators as proxies for human capital. Their analysis by income level and gender shows that human capital is unevenly distributed in the population: Poorer individuals and women have considerably less access to education.

A more direct measure of human capital is provided by achievement tests focused on high school students or the adult population. OECD's PISA and the International Adult Literacy Survey (Kirsch, 2001) show that the Chilean

population does not have the basic reading and mathematics skills to participate successfully in a global economy. Cross-country comparisons show that Chile's standing is similar to or slightly better than those of other Latin American countries. For instance, in the 2006 PISA, Chile and Mexico had similar reading scores (442 and 410, respectively); these were below the OECD average by a statistically significant margin (OECD, 2007). It is worth noting that the measures of knowledge and skills used for the youth or adult populations are essentially the same as those focused on learning results that were described just above.

Three quality issues arise from measures of human capital. First, while measures of human capital aim to evaluate the final product of the educational system, many times they instead end up measuring educational inputs, mainly coverage. Second, the increase in educational coverage has probably been Chile's major achievement during the last few decades. But this positive trend has not been seen as an achievement of quality. Third, comparisons among countries are usually biased since they do not consider differences in school coverage. Considering the huge differences in school coverage among developing (and Latin American) countries, it is very important to compare achievement scores by adjusting for the percentage of the population that was tested.

An Answer from the Legal Reforms

From 1990 to 2009, four different governments from the same political coalition have pursued a consistent educational policy in order to improve education. Huge amounts of resources, both public and private, have been invested in the effort to overcome problems of quality and equity in the education system. Public expenditure on education rose from 1.5% of Gross Domestic Product in 1990 to 2.7% in 2008, and to 3.12% in 2003 (Ministry of Education [Mineduc], 2010). This national effort was recognized by the OECD (2004) which asserted that "more than any other country in Latin America during the past decade, Chile has systematically tried to improve education access and quality" (p. 99).

After several years of education reforms, the year 2006 saw what was perhaps the first relevant attempt to formalize a definition of education quality. That year a massive movement of secondary students demanded structural changes in the education system and quality education for all. To answer these demands, President Michelle Bachelet created the Consejo Asesor Presidencial para la Calidad de la Educación (Presidential Advisory Council on the Quality of Education), which brought together 81 representatives of different political, academic, religious, and ethnic parts of Chilean society. The Council's mission was to formulate the normative and instrumental reforms required to guarantee all students the right to a quality education. In its final report (Consejo, 2006), the council recognized that in Chile the concept of quality education has been closely related to the human capital paradigm and therefore linked to economic development; it underlined the need to define a concept that is also linked to human development. It proposed that the Ministry of Education define four types of indicators to evaluate education quality:

coverage, educational achievements, quality of educational processes, and level of financial investment in the education system.

Three years later, and based in part on the Council's work, the Ley General de Educación (LGE), or general law on education, was made official. This law, the most important legal text regulating the educational system in Chile, represents significant progress in the way that education quality is officially understood in Chile. It defines education as a "permanent learning process that covers the different stages of people's lives and has as a goal the spiritual, ethic, moral, emotional, intellectual, artistic, and physical development through the transmission and cultivation of values, knowledge, and skills" (Republic of Chile, 2009, Article 2). This official statement of the goal of education suggests, using Avalos' (2003) distinction, a "broad human development" concept that is useful for both state and individual interests. On the other hand, following the distinction made by Barrett et al. (2006), the law suggests using measurable and non-measurable indicators to evaluate educational ends and processes. Seen this way, the LGE offers a comprehensive definition of education.

What does this law state about education quality? The most significant initiative established by the LGE is the Agencia de Calidad (Education Quality Agency), part of a new education-quality assurance system. This agency will be in charge of the national and international assessment program (SIMCE), along with a national system to evaluate school performance. These will utilize measurable standards of education quality based on learning achievement and school performance (Republic of Chile, 2009, articles 37, 38). We do not yet know what these indicative standards will be. If they are all measurable, they will likely not account for the extended concept of education quality that the LGE articulated. However, they will probably cover most of the measurable indicators that can be used to evaluate education quality, which makes them an important attempt to conceptualize education quality in a more comprehensive way.

An Answer from the Policy Reforms Applied in Chile

What concept of education quality lies behind the policy projects that have been designed to improve education?

To answer this question, we now summarize some of the main policy reforms undertaken in the last two decades, especially during the 1990s, at the primary and secondary levels, and focus specifically on one of them: curriculum reform. Addressing these changes will allow us to illustrate what education quality meant for the policymakers and for the diverse social and political actors who were involved in policy design and execution.

As we asserted at the outset, faced with evident quality and equity problems in the education system, the first democratic government (1990–1994) made it a priority to initiate a process of continuous improvement in the educational system. It began this process by designing and implementing one of the most important education reforms, in terms of resources invested and variables intervened, ever

seen in the history of Chile. This enormous task would also be taken on and continued by the following governments.

Thus, in 1992, with technical and financial assistance from the World Bank, Chile began a systemic reform of primary and secondary education, one that sought to simultaneously improve both the quality and the equity of education at these levels. Most of these reforms were contained in a package of projects called MECE, the Programa para el Mejoramiento de la Calidad y Equidad de la Educación (Program to Improve Quality and Equity in Education). During the 1990s it had two parts: MECE-Básica (primary level, 1992–1997) and MECE-Media (secondary education, 1995–2000). A tertiary level reform, called MECE-Sup, began in 1999 and continues to the present.

As described above, the reform undertaken during this decade was systemic. Specific projects focused on many factors related to education quality and equity. Delannoy (2000) and Cox (2004) provide some examples. One program focused on preventing grade repetition, while a second provided additional funding for small and isolated rural primary and secondary schools. School-based improvement plans were designed to encourage schools and teachers to take a more proactive role. In School Networks through Technology, a nationwide school-computer network, ENLACES, was designed to enrich schools and modernize the curriculum. The school week was extended, from 30 to 38 hours in primary education and from 36 to 42 hours in secondary education. Learning materials (textbooks, classroom libraries, and computers) were improved, and a new curriculum framework was developed.

It is very likely that curriculum reform was the education initiative that best symbolized the new concept of quality education held by the democratic governments, because this reform constitutes most, if not all, of the education goals the society desired from its education programs: learning achievements in several disciplines, and a national identity, along with cognitive, spiritual, moral, and affective development. For this reason, we now explore the concept of education quality implicitly stated in this reform.

Curriculum Reform

The curriculum reform of the 1990s in Chile was designed to fulfill what Cox (2004) describes as three major education needs:

> … the need to make school experience harmonious with profound and secular changes in society; the need to upgrade the quality of the educational experience and expectations offered to the majority; the need to modernise the value basis of the school experience, strengthening its democratic orientation after 17 years of authoritarianism. (p. 24)

Overall, these changes sought to respond to the "need to form more flexible persons, able to adapt to change and use knowledge for innovation; able to continue learning and prepare for active citizenship" (Cox, 2004, p. 24).

To fulfill these needs, the government established the TFO (Transversal Fundamental Objectives) for primary and secondary education as a major and innovative change to the curriculum. Representatives from several sectors of Chilean society participated in developing this reform, over a long period, and it was based on delicate political agreements (Gysling, 2003). Overall, this reform included the TFO, the fundamental goals and minimum contents, and the traditional vertical objectives. It expresses what Chile, as a country, understands as a quality education.

The TFO makes reference to general education objectives: knowledge, skills, attitudes, values, and behaviors that students are expected to develop in the personal, intellectual, moral, and social areas. These objectives are assumed by the curriculum as a whole, with appropriate operational adaptations based on student characteristics at each level (Mineduc, 1998).

For both primary and secondary education the TFO was to contribute to four key goals: (a) strengthen students' moral education; (b) guide personal growth and self-affirmation; (c) guide the way that people interact with others and their environment; and (d) (for secondary education) develop creativity and critical thinking (Mineduc, 1998, 2002). Below we explain these goals in more detail. For the first three we focus on the primary level (Mineduc, 2002), and for the fourth we focus on the description used for the secondary level (Mineduc, 1998).

In relation to ethical and moral education, primary-level students must develop a capacity and will to regulate their own conduct based on an ethically formed consciousness, one deriving from their own spiritual values, and one that includes the desire for truth, justice, beauty, a spirit of service, and respect for others. Education will be considered successful when the following capacities can be noted in students:

- They exert responsibly growing degrees of freedom and personal autonomy, and often perform acts of generosity and solidarity, within a framework of recognizing and respecting justice, truth, human rights, and the common good
- They respect and value ideas and beliefs that differ from their own, and recognize dialogue as a tool they will use throughout their lives to humanize situations, overcome differences, and find the truth
- They recognize, respect, and defend the equality of essential human rights, without making distinctions based on gender, age, physical condition, ethnic group, religion, or economic situation

In relation to personal growth and self-affirmation, the focus of education is to stimulate in students the potential qualities and traits that form and reinforce their personal identity, develop their emotional balance, and stimulate their interest in lifelong learning. Among these qualities and traits the following are crucial:

- They value physical development and exercise within a context of respect for life and the human body; they also develop habits of personal and social hygiene, and acknowledge the importance of personal safety
- They develop reflective and methodical thinking and personal self-awareness

– They learn to express and communicate opinions, ideas, feelings, and personal convictions with clarity and efficacy
– They develop the capacity to solve problems, to be creative, and to learn independently

In relation to individuals and their environment, education emphasizes mutual respect in all interactions, a sense of active citizenship, and a respect for the national identity and democratic coexistence. In this area, four objectives are key:

– They understand and acknowledge the importance of emotional and spiritual dimensions, including ethical and social principles, and the norms for a healthy and balanced personal sexual development
– They acknowledge the social, emotional, and spiritual importance of family and marriage
– They work to protect the natural environment and promote its resources as a context for human development
– They develop personal initiative, a capacity for teamwork, and an entrepreneurial spirit, and recognize the importance of work as a way of contributing to social development, personal growth, and the common good

In relation to creative and critical thinking, the objective is for secondary students to develop and deepen the higher-order intellectual skills they need to clarify, evaluate, and generate ideas, in addition to the capacity to predict, estimate, and reconsider their own actions when involved in problem-solving tasks. Two sets of skills are among those that secondary education must especially promote:

– Research: the capacity to identify, process, and summarize relevant information from a variety of sources; to organize relevant information about a topic or problem; to review statements considering new evidence and approaches; and to suspend judgment when information is lacking
– Communicative skills: the capacity to present ideas, opinions, convictions, feelings, and experiences in a coherent way, making use of diverse ways of expression

This sample of the reformed curriculum clearly reflects the intention to pursue a "broad human development", which defines education quality in a comprehensive way, and not just as a source of human capital development.

CONCLUSION

Education quality is a complex, multifaceted concept. In Chile, this complexity is observed in the different views that coexist regarding quality education. While the economist view emphasizes education as a means for economic and social development, the humanist view emphasizes education for personal development. Both views should be understood as complementary perspectives on education quality.

An array of different approaches and indicators exists to account for education quality. These indicators provide important information regarding the effectiveness of the school system. They show how many students are reaching the curricular standards, provide insights into trends in student performance, and make it possible to benchmark Chile's performance and compare it to those of other participants in international assessments.

Learning is what matters most in education. Accordingly, focusing on learning outcomes is an important step to measure quality. Input measures traditionally used as the primary indicators of quality (e.g., infrastructure, textbooks, teaching force) are now considered secondary in importance, compared to learning.

Standardized achievement tests are the instruments used most often to evaluate quality and have had more impact on policy decisions. Examining the Chilean case, we observe that it shares with many other countries the preference for using learning outcome indicators to evaluate education quality. Thanks to a strong assessment system, learning outcomes, as measured by standardized assessments, are by far the most credible indicator of education quality. Consequently, the public discussion about education quality has mostly been based on the evaluation of learning outcomes that is delivered annually as a product of the national and international standardized achievement tests.

Nevertheless, it is important to recognize that some important aspects of education quality are not captured in learning outcomes. Grit, passion for learning, self-discipline, respect for norms, perseverance, social skills, capacity to work with others: all these are important traits for success in school and in life (Duckworth, Peterson, Matthews, & Kelly, 2007). The Chilean curriculum intends to nurture these characteristics, but they receive little attention in the political discussion. A challenge remains: How can Chile increase the attention paid to these personal traits? In responding to this challenge, Chile will be in a better position to foster quality education for all.

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QUALITY EDUCATION

Challenges and Policy Choices

The concept of national development remains much contested and the processes of development remain subject to continuing debate. Since the early 1970s, popular strategies for development have shifted their focus from literacy, national economic growth, and basic needs to institutional capability and economic globalization. Integral to these changes, the trends in educational policies have shifted from a priority on access to schooling toward increasing the quality and equity of basic education and, most recently, toward expanding post-basic education.

Within the context of national development, the continued international search for educational quality has shown a variety of patterns. All of the preceding chapters tell of struggles, successes, and problems encountered in seeking to define and extend quality education. In all cases, specific national issues and concerns compete with global agendas. Early issues frequently were the choices in priority between levels of education. Most commonly the early priority was given to basic education. However, higher education, and its potential for rapid human resource development, also had its early advocates.

This final chapter draws from the research reported in prior chapters. The attempt is to capture the range of interpretations of quality education as applied to shaping educational policies or to analyzing and responding to specific educational issues. Although precise definitions of "educational quality" are elusive, if not non-existent, attaining improvement in existing educational systems persists as a common goal. All of the preceding chapters offer examples of countries that have recognized the significance of education and have given the education sector a high priority among their national and major sub-national goals. A few decades ago even such agreement on priority would have been unthinkable.

Moreover, the goals of quality education may vie with, or coexist with, goals for equity. Thus, this chapter also includes a section in which attention is given to possible actions that support a more equitable education without ignoring the requisite of quality. In this final section we suggest three models depicting choices for guiding the educational future of nations.

C. Acedo, D. Adams, S. Popa (Eds.), Quality and Qualities: Tensions in Education Reforms, 197–208.

CHALLENGES TO EDUCATIONAL QUALITY

The previous chapters have explored notions of quality as understood within various systems of national, formal, and nonformal education. Also considered have been the tensions that arise with the introduction of new standardized notions of quality in relation to international measures and educational reforms in developing countries. Six of the chapters are country case studies, and they show considerable variation across each country as its national educational system developed, encountered new problems, and tested educational reforms. Three of the chapters are case analyses which examine in depth the consequences and difficulties encountered as two increasingly common trends grow in size and importance. These analyses include the introduction of new English language programs in two nations and one national case analysis of widespread private tutoring, an important and often expensive form of privatization. In both the case studies and the case analyses, examples are found in which political preferences fluctuate, existing policies are found wanting, and new opportunities occur within nations. Local conditions and priorities change, and globalization pressures increase.

All the countries reviewed have accepted the economic globalization model, at least as part of their policy discussions. This model suggests great challenges and high expectations for the contribution of education, particularly (but not exclusively) in ensuring economic growth. There are at least three major implications of this model for education policy, planning, and practice: (1) the increased centrality of education in national development policies and strategic planning; (2) the increased focus and priority on privatization and decentralization in meeting national and global goals and standards; and (3) the trend toward an emphasis on, and assessment of, education quality at all education levels. However, the global presence of these trends does not mean that reforms always were successful or effective at any given time in the country's development.

The globalization model, frequently referred to as the World Bank model (World Bank, 2006), is also advocated by OECD and several regional banks. The model's recommendations that education systems give high priority to ICT (information and communications technology), math, science, and English have had varying degrees of influence. Examples of those countries aggressively envisioning economic globalization are China with its goal of 100 first-class universities and promotion of the English language, Malaysia with its comprehensive 20/20 development plan and new curriculum for the teaching of math and science in the English language, and Korea with its Brain Korea reforms which include heavy private and public investment in R&D and in a range of projects to raise education quality.

One of the countries examined, Venezuela, has largely rejected the global model of development advocated by the World Bank as an explicit guide and has sought a model with greater attention to equity. As Matthew Rhodes explains, Venezuela has proposed an alternative: the Bolivarian model. "The aims of the Bolivarian revolution are focused around a platform of social equity and include significant

redistribution of state money to programs that target traditionally marginalized sectors of the population". His description of the Bolivarian model favorably cites UNESCO's persistence in emphasizing equity as a major goal.

Challenges to quality that are given particular attention in the chapters include changing definitions of quality, high expectations for education and issues with implementation, and the introduction of English as a means to achieve quality in a globalizing world.

Changing Definitions of Quality

There are significant variations across countries in definitions of educational quality and in actions and programs to attain national and local objectives. The national discourses persist and policies may change significantly with changes in political control, and as result of major social, demographic, and cultural changes. Lam Quang Thiep and Vu Thi Phuong Anh focus on contemporary changes in the governance of higher education in Vietnam and discuss how the definition of quality and its resulting innovations in the management of higher education changed over time as the country moved through different phases of development.

Prior to 1985, quality in higher education was not an issue, since the process for choosing students was highly selective. However, in the mid-1980s, Vietnam adopted a national innovation policy which led to changes throughout the society and economy, including tertiary education. Thus, in the last two decades in Vietnam, higher education has seen the implementation of various measures which have resulted in exponential growth in the numbers of both students and institutions. Quality management has now become a major challenge to achieving improvements in learning. In an earlier period of Vietnam's higher education, quality management was thought to be synonymous with the control of inputs, i.e., student intake. More recently, it has become necessary to focus on outputs, i.e., meeting national academic standards.

In Argentina, changing definitions or conceptions of quality have interacted in the planning and implementation of educational reform since the end of the 1980s. As Jorge Gorostiaga and Adrián Ferreira note,

> The national policy has been influenced by different views of educational quality, including the rather instrumental view of international organizations as well as broader conceptions espoused by local academics and policy makers. As a result, the national discourse and policies have tended to express an unresolved tension between competing notions of quality.

The authors additionally voice a concern noted in several other chapters: "the implementation of reform policies has been marked by difficulties in achieving improvements in both quality and equity".

High Expectations and Continuing Issues with Implementation

High expectations for greater or more immediate economic returns from investment in education may present an ongoing challenge to efforts to achieve quality. For example, Lelei and Weidman, in considering persistent challenges to quality education in Kenya, document a sequence of reports by various external commissions and recent governmental policies. They suggest that the several reports had limited impact and conclude that implementation "hinged … on the political commitment and will of politicians …". The Kenyan experience is unique in its context but reflects a common pattern of concern about the limitations of policies defined by the center with inadequate attention to the costs, complexities, and involvement of the range of actors required for successful implementation. Successful implementation of the commissions' recommendations hinged not only on the political commitment and will of politicians but also on availability of funds, both domestic and from international donors.

The implementation of reform policies in all countries has been marked by varying degrees of difficulty in achieving improvements in both quality and equity. Policies were often designed in the center by nationally sponsored teams that paid limited attention to the roles of local administrators and teachers. Implementation in some cases appears to have been defined as following the guidelines laid out by the producers of the policy, the assumption being that because of status or reputation, the designers of the plan best understand the implementation process. This is quite possible. However, well trained teachers and local administrators expect opportunities to interpret and adjust policies to fit local schools. Although central policy makers can establish some of the goals and also set some of the conditions for reform, local adjustments and adaptations often will be necessary (Adams, 2003).

Megahed, Ginsburg, Abdellah, and Zohry look beyond macro policy statements and bring the discussion of quality and implementation directly into the teaching-learning processes. They identify a continuing concern for educational quality by successive Egyptian governments, noting that "improving quality of education" is "often framed as changing teaching and learning processes from teacher-centered approaches involving transmission and memorization to student-centered and active-learning approaches". Their research suggests that although teachers generally expressed openness to changing their ideas and practices, they were reluctant or unable to do so without further formal professional development and on-going guidance and support. The authors comment that, in addition, the Egyptian government would need to shift the focus from continuous assessment of students to restructuring the examination system so that teachers, students, and parents would "not be so oriented to preferring transmission and memorization styles of teaching and learning". They observe that: "This point reflects one of the tensions inherent in globalized movements to improve educational quality: implementing reformed teaching practices and using un-reformed approaches for assessing student outcomes".

Introducing a World Language

A world language, usually English, is often seen as one key to education quality in a globalizing society and is often viewed as a requisite to advanced education. Two of the case analyses, China and Malaysia, identify some of the problems encountered in this effort to achieve quality.

Rebecca Clothey describes how providing an effective English language program in China is a continuing challenge where decentralization has been promoted and vast regional differences persist. China's post-Mao leaders have considered education a key to economic development. English language skills are viewed as fundamental for achieving the nation's modernization goals and catching up with the more technologically advanced western nations. English therefore has been further emphasized as part of China's national curriculum. A level of English competence is required for university entrance, most bachelor degree candidates are required to pass a competency test, and employers also often require English competence in new employees. However, options for improving English may be poor or limited for many students, particularly in rural or other disadvantaged sectors. All of these factors have converged to create an environment that has led to a proliferation of English language learning programs; in fact, these programs now comprise a rich and growing industry with over 50,000 English training organizations throughout China.

The proliferation of private enterprises offering English language classes means more choices for students who wish to improve their English skills but may not find the courses offered at their university adequate. However, most private English language programs are offered in large cities, especially in the more developed eastern coastal regions where there are more foreigners and demand is highest. Furthermore, Clothey observes, "people … who are least able to judge the quality of programs often pay the most attention to marketing when making selections".

The conditions leading to demand for English in China are similar to those in several other Asian countries. Under the rubric of Vision 2020, the focus of national education reform in Malaysia has shifted from expanding access to basic education, in part through instruction in Malaysian, to developing Malaysia into a center for educational excellence in the Southeast Asian region. Requiring instruction in English as part of the curriculum is considered essential to achieving this goal. However, Kee points out a recent deterioration in the English proficiency of Malaysian teachers. In the early 1970s, the rise of Malay nationalism led to the requirement that the language of instruction be converted to Malay for both secondary and tertiary education. This requirement was intended to expand higher education access to the Malay population; however, it has also meant that newly trained teachers are less familiar with English.

Kee further notes that, given the new status of math and science, there is a tendency toward stereotyping both students and teachers according to their orientation or skill related to these subjects. Students who are not selected for the science stream, which is viewed as the college track, and teachers of science and

math who do not speak Standard English are often labeled as poor students and incompetent teachers. Thus a situation prevails where the teaching of science in English may be good pedagogy but adds significantly to the time and costs for the preparation of competent science teachers.

PATHS TO QUALITY WITH EQUITY

Quality in education is inextricably linked to equity and frequently they are seen as tradeoffs. Although there are choices of investments which may support one goal more than another, all countries over time must cope with both. All the countries reviewed demonstrate a commitment to developing an effective educational system which attempts to provide all children, youth, and adults the best education possible. National policies and reforms tend to change somewhat with new governments, new relevant research, or changes in demographic and social influences. However, both quality and equity concerns persist, and both areas of concern have received strong public and government support. Fortunately, many of the obstacles to equity are well known. Unfortunately, acting on these insights may require the implementation of major new, and sometimes controversial, policies. Nevertheless, this is an ideal to be pursued continually rather than a set of specific objectives which can be achieved and subsequently ignored.

Several educational policies which affect equity are justified as helpful to better teaching and are common in many countries today. These policies include, but are not limited, to (1) extending the length of basic education; (2) navigating the educational organization; (3) selecting schools for students to attend; (4) developing school-community relations; (5) making various within-school decisions; and (6) implementing high-stakes examinations which determine further schooling opportunities. All of these may be justified under certain conditions. The first is the least controversial.

Extending the Length of Basic Education

All the countries reviewed have sought to extend compulsory education within their financial capability. Globally the length of basic education has been steadily increasing from 4–6 years to 8–9 years. Some countries have achieved universal 12 years of education for all students. Such policy achievements have meant a higher level of literacy and more options to choose other schooling or work opportunities. Further, education tends to be addictive in a positive way: those who have a little may want more. Thus, extending basic education has meant increased demand for advanced education.

As demonstrated in Korea, a sequential pattern of growth built upon public provision of lower education levels can contribute to equity in the distribution of education. Additionally, and not surprisingly, introducing a compulsory education law increases mean income levels. Education raises income levels through both its direct market effect and a set of indirect effects (Choi, 2009).

Navigating the Educational Organization

The structure of education systems and the pathways through those systems can help or hinder equity. Traditionally, education systems have used examinations to sort students into different tracks, institutions, and streams according to perceived academic ability. Presumably this action allows teachers to adjust their teaching methods appropriately. However, vocational tracks often have been viewed as terminal education.

For purposes of equity, a better strategy could be to limit early tracking and early selection in basic education. Furthermore, other forms of evaluation in addition to examinations could be used to guide students through the system. In post-basic education, alternatives need to be provided, an action which may reduce dropouts and allow students to respond to the contemporary demand for a range of human resources. Upper secondary education, to be attractive not just for the academically-inclined elite, must offer good-quality pathways without dead ends, along with effective links to the world of work. Ideally there would be a variety of models available to allow those in vocational programs to gain access to tertiary education. In addition, lifelong education, including opportunities to re-enter educational programs for cultural, technical, or other reasons, reflects a policy commitment to equity and perhaps should be considered a right of citizenship.

The policies related to equity may be refined or altered during the implementation process. Within educational institutions and systems, streams of actors, problems, solutions, and choices of opportunities combine to produce outcomes that are difficult to predict.

Selecting Schools

Schools, even primary schools, may vary in quality. The perception of variation in quality of particular schools may also vary within or across communities. Steps need to be taken to ensure that this condition does not result in increased differences in the social composition of different schools. Given school choice, there are ways to promote an acceptable social composition in schools. For example, selection methods such as lottery arrangements are now well developed.

One important, but not necessarily popular, action is to direct resources to students and regions with the greatest needs. Countries need adequate mechanisms for redistributing resources and minimizing regional inequities of provision, so that minimum standards are met everywhere. Extra resources may also need to be channeled through schools to help disadvantaged students.

As noted above, Venezuela is currently undergoing a comprehensive national restructuring program called the Bolivarian Revolution and virtually no realm of Venezuelan life remains untouched. A major focus of the revolution is the allocation of state monies to marginalized sectors of the population. As this revolution has unfolded, profound sociocultural changes have occurred along with, and to some extent because of, significant shifts in modes of state functioning. In addition, shifts in state functioning have accompanied, or have caused, profound

socio-cultural change. Education, as a sector that intersects with both of these broad spheres, has seen significant reform efforts in terms of equity but not necessarily in terms of overall quality, so a further segmentation of the system is possible.

Developing School-Community Relations

Practices in the classroom affect equity, as do out-of-school practices, particularly relationships between schools, parents, and communities. Since no governmental or local reform alone will solve all the problems, parental and community actions and preferences at the local level may be crucial. For example, in a number of countries, families and communities have demonstrated that they are willing to learn to cope with many local problems related to schooling. Teachers in schools with small enrollments may teach multi-grade classes, community members with special skills may enrich the school curriculum, mothers may prepare and deliver food for lunch, and community adults may repair or modify school buildings.

Implementation of existing or new policies has been recognized by several countries as a persisting problem. Some national and local traditions such as Harambee (described by Macrina Lelei and John Weidman) and the Bolivarian model (described by Matthew Rhodes) could be key to the successful design and implementation of workable, participatory, local reforms.

Making Within-School Decisions

The student body may vary from school to school in terms of its social, economic, or demographic composition. Thus decisions made within schools can affect equity. For example, efforts may need to be made to respond to diversity and provide ways to successfully include migrants and minorities within mainstream education. Early childhood education and care is helpful for disadvantaged children and provides a strong environment in which to learn a second language. Special measures may encourage the children of immigrants to participate. Where immigrant and minority groups are disproportionately streamed into special education institutions, attention should be paid to two questions: Do diagnoses involve cultural biases? And is separate schooling in the best interests of the students involved?

Implementing High-Stakes Examinations

In attempting to assist their children to acquire an education most beneficial to them, many parents appear to follow the principles of *more* and *better*. This often takes the form of private tutoring focused on assisting the student to do well in science and mathematics, in English, and/or on the entrance examinations. When post-secondary education is rare, parents try to give their children sufficient support to complete this level (the principle of *more*). When post-secondary education becomes largely available, then competition moves to preparation for the

more prestigious institutions. Parents, to give their children an advantage, provide even more tutoring and other assistance to enter the "better" institutions (the principle of *better*) (see also Nagy, 2000).

As noted above, Korea has achieved universal secondary education. In addition to private businesses focused on English language instruction, there is a large and growing market for private tutoring to assist in the preparation for entrance examinations to higher education. Thus an increasingly popular "shadow education" is developing alongside the public system for those who can afford to pay the fees. In his case analysis, Chong Jae Lee identifies the equity issues related to private tutoring, describes the efforts of policy makers to cope with them, and suggests additional policy changes to address the problem. As in Korea, extensive private tutoring has led to many problems in several countries. One of several concerns is that a focus on tutoring is costly. Even though, on a personal level, private tutoring supports academic achievement and higher test scores, and helps to prepare for entrance competition, this approach restricts equal educational opportunity and may negatively affect the quality of the public schools. The richer students can obtain more expensive (and perhaps better quality) private tutoring; moreover, such tutoring often distorts the regular school study. For example, some students who study very hard at private institutes in the evening or at night are not alert during regular school classes in the morning or afternoon.

Three of Lee's suggestions for changing education policy to resolve the private tutoring problem are as follows. First, move from government intervention and regulation to giving autonomy to universities in selecting students to encourage universities to formulate multiple criteria for the selection process and respect the diversity of secondary education. Second, diversify the criteria for selection from a single test score to multiple criteria, such as student learning portfolios and achievements, since an exam has very limited capacity to measure the kinds of qualities needed in society. Third, increase the equity in the selection process by allocating some admission quota using affirmative action. (See also Lee, 2008).

CHOICES: A GLIMPSE OF THE FUTURE

What to continue and what to change? This is always the dilemma of educational reform. Considering the economic and social impact education has demonstrated over the last several decades, an observer might well argue for more of the same. Yet, in the vibrant context of global change this cannot be an acceptable response. Three models are presented for seeking higher quality. As will be described, they may vary in their contribution to equity. Model A utilizes a relatively new version of a rational planning model for education that has resulted from, or at least has been refined by, the recent development and use of international achievement tests. Model B radically extends the functions of schools at the community level. Model C maintains, but encourages improvement to, the traditional educational model.

Model A: Education for Global Economic Competition

Currently international tests are available which claim to measure both student achievement in various subjects and the ability of youth to apply their learning in the solution of life's problems. Andreas Schleicher (2009), a member of the OECD Directorate for Education, describes how PISA results may be central to strategic national education planning: PISA "can identify which factors appear empirically to be 'universal' features supporting good quality learning at school and which factors are specific to particular cultures or systems" (p. 254). Given this powerful information, some countries that are dissatisfied with the quality of their education systems as measured by international test scores are examining new pathways to educational reform. The approach is to look for models among the countries with higher PISA scores. Thus educational reforms may become a process of using higher educational standards as goals. At minimum, this approach to strategic planning has included the following sequence: (1) a review of local and national standards; (2) selection of standards from countries scoring high on PISA tests; and (3) establishment of a system for monitoring progress toward attaining the new benchmarks. A refinement to this process could include an attempt to choose high-scoring countries with some contextual similarities to the lower-achieving country.

Is there a choice among the models? Some of the international literature suggests that there is no logical choice but to follow Model A. Authors argue that only one route leads to an opportunity for economic survival, given the demands of economic globalization. Some observers would argue further that effective economic advancement means the choice of this education model emphasizing math and science within a planning context of competition, autonomy, and accountability.

Model A is becoming popular and should not be rejected lightly. Several powerful international organizations and many talented, experienced educators have laid the foundation for this view. Successful competition in attaining this goal may offer economic rewards. Moreover, in general outline, there is a planning model already available to follow. There are however, technical concerns and possible social costs in the process. The validity of PISA and other international test scores has been challenged and the subtleties of using cross-country comparisons to modify an educational system cannot be ignored.

Model B: A Community Learning Center

Model B rejects the perceived technocratic mindset of Model A and suggests a possible radical reconfiguration of the functions of schooling, to respond to both internal changes and international trends. An assumption is that education and schools should be part of a significant response to ongoing social and demographic changes. This model suggests the family can no longer be assumed to reproduce labor and knowledge as it has in the past and that schools may need to assume demanding new social functions.

Model B thus responds to the recommendation of placing the school at the center of a community learning network. There is a small but significant international literature that has forecast that such a reform can be effective in coping with changing family lifestyles and work patterns (Carnoy, 2001; Heyneman, 2008). Model B provides recognition of a potential need for "social integration", and the coordination and support of such functions as community services, nursing, caring, and various after-school services. Additionally, this model could facilitate community dialogue and lead to other educational and social networks. Close linkages to the community may add to the resilience of schools in facing new fiscal and other challenges. Under such a model teachers and administrators at the school level can influence policy and learn how to work in partnership with senior administrators, political leaders, and community leaders. Thus in this vision, schools may support a more comprehensive "lifelong learning" by giving leadership to a school-centered, community learning network.

Model C: Forward to the Basics

This model is based on the assumption that schools should concentrate on the performance of many of the functions they have historically performed. Adjustments and modifications can be made as new demands and needs emerge. A further assumption is that teachers and administrators can be designers as well as implementers of educational change. They can be, and should be, partners in designing and adapting new functions of the school.

Key characteristics of Model C include focusing on teaching and learning and enhancement of the roles of teachers, students, parents, and administrators. One continuing objective is to build a school culture that encourages learning and adaptation to changing local and global needs. Active approaches to learning have shown much promise and should be widely encouraged. Networks of teachers will expand, providing opportunities to share ideas and experience globally. We are only beginning to learn how the instructional and research power of computers and the Internet and the range of available technology can most effectively enhance productivity. The most effective roles of new technology will result from further demonstration and continued use in the schools.

In Model C, quality education will include competence in mathematics and science. Yet, quality education will mean very much more. To interpret all the other parts of the curriculum as irrelevant is naïve. Many vocations and lifestyles require, or are enriched by, the research skills and content knowledge from a range of disciplines. The new standards may include viewing problems through multiple perspectives, learning from history, and seeking a greater integration of the liberal arts and scientific inquiry.

PISA and other international tests, of course, could be used under Model A, Model B, or Model C. These models do not deny the technological globalization taking place. However, Model B suggests the need for a wide range of evaluation approaches to assess its many objectives. Model C could well utilize PISA and other international instruments to complement locally- and nationally-designed

evaluations. The heavy emphasis of these tests on science and mathematics makes them particularly central in implementing the changes required by Model A.

For an extended period, indeed centuries, nations have been borrowing and adapting ideas about education. Education systems will continue to reach out locally and globally for new ideas. With improved, extended research from the systemic level to the classroom, new ideas will find their way into practice. The media will continue to both help and confuse. It has been said that "It takes a community to raise a child". Perhaps we soon can honestly say, "It takes the globe to educate a population".

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