A comparative case study of female literacy and development in Guatemala and Bolivia

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A Comparative Case Study of Female Literacy and Development in Guatemala and Bolivia

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A Comparative Case Study of Female Literacy and Development in Guatemala and Bolivia

by

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Abstract

This comparative case study will analyze the education reform policies pursued by Guatemala and Bolivia from the 1980s to the present. Education reform projects and international aid were provided as development strategies in Latin America to improve gender equality in education and literacy rates during the 1990s. Female literacy was viewed as an important goal in obtaining human and economic development in the region of Latin America. Guatemala and Bolivia were two countries of interest because of high poverty rates, illiteracy rates and gender disparities in education. Both Bolivia and Guatemala signed on to educational goals of Education for All (EFA) in 1990, and renewed those interests with the Millennium Development Goals (MDGs) of 2000 when the goals of EFA remained unmet. Following Bolivia’s shift towards a leftist form of government in 2006, new laws and programs have created different education and literacy strategies that emphasize elements of critical social theory. The new education laws in Bolivia deviates from the dominant human capital theory methods used and promoted by various international development programs. This paper will argue that education methods and policies based on critical social theory, such as those being implemented in Bolivia, will be more effective than the currently dominant human capital theory methods and policies of international institutions, which continues to prevail in Guatemala, in addressing gender equity in literacy and education as well as society as a whole, particularly among the indigenous populations of Latin America.
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Chapter One
Introduction

Education as a Right

In 1948, the General Assembly of the United Nations approved the Universal Declaration of Human Rights. Education was listed as a fundamental human right in Article 26 of the declaration stating that “Everyone has a right to education”. Its inclusion was viewed as an important way to maintain peace: “It shall promote understanding, tolerance, and friendship among all nations, racial, or religious groups, and shall further the activities of the United Nations for the maintenance of peace”¹. In 1990, the commitment to education was revisited in the UNESCO-sponsored World Conference of Education for All (EFA). During the conference, delegates from 155 countries and representatives from approximately 150 organizations agreed to substantially reduce illiteracy rates and universalize primary education by the end of the decade².

The EFA conference recognized the importance of basic education as a foundation for human development. Scholarly research also supported and targeted the importance of educating girls as a crucial component of creating development and improving the quality of life for society as a whole³. Economists, in particular, began to advocate for female literacy and education as an important strategy for development. Amartya Sen’s research illustrated the higher than average levels of development in Kerala compared to the rest of India, which was correlated to higher


rates of female literacy in the region. The higher rates of return or “positive externalities” of targeting and investing in female education as a strategy for development included improved infant and maternal mortality rates, higher life expectancy, lower fertility rates, and opportunities for women to become politically and socially active and act as agents toward social progress\(^4\). International institutions, particularly the World Bank, provided significant aid towards reaching the goals of gender parity in primary education and increasing female literacy levels.

When the EFA reconvened in 2000, many countries were far from having reached their goal. The commitment to Education for All was reaffirmed in 2000 when the UN endorsed education goals that would meet the learning needs of all children, youth and adults by 2015\(^5\). The EFA goals contributed to the UN’s Millennium Development Goals (MDGs) of achieving universal primary education and gender equality in education\(^6\). Since female literacy has been recognized as a key strategy in improving the political, economic, and social development of a country, it is important to revisit the progress made in developing countries that have implemented education reforms since the commitment to “Education for All” was made in the 1990s. This is particularly important with the MDG and EFA’s deadline of 2015 quickly approaching.

**Financing Education Projects**

Since the 1990s, the international institutions such as the World Bank and IMF have financed education projects and molded the education strategies pursued in developing countries


with the aim of achieving these goals\textsuperscript{7}. The international institutions continued to use human capital theory in justifying the need to invest in female literacy and education. In the human capital theory rationale, basic education for poor people is the crucial element for stimulating empowerment by increasing their capacity to create income and break the intergenerational cycle of poverty. This strategy would also contribute to an increase in labor productivity, economic growth, and social development\textsuperscript{8}. Therefore, investment in female education at the primary level was simply good economic policy because it would allow them to acquire the necessary capabilities to participate in the labor market. Data for the World Bank’s support for primary education completed by the Independent Evaluation Group (IEG) demonstrates the hike in education lending after EFA and the MDGs.

The economic and market-driven methods employed in human capital-based models have been heavily criticized by critical social theorists, particularly those influenced by Paulo Freire

\begin{figure}
\centering
\includegraphics[width=\textwidth]{chart.png}
\caption{Education Lending Trends}
\end{figure}

\textit{Source: IEG, “Evaluation of World Bank’s Support for Primary Education”, Accessed April 26, 2012.}
\textit{http://go.worldbank.org/B8OF7YO3J0}

\footnotesize

and Deweyan pedagogical principles. Of particular concern is the fact that the World Bank and its education policy prescriptions are formulated by economists and not educators. The policy prescriptions lead to objectives focused on economic efficiency, freeing markets, and the globalization of capital. In addition, the human capital model creates an overemphasis on quantitative methods as a means of measuring the success of policies.  

Education policies that are focused on meeting the needs of the labor market or international market in general then do not address the historically and socially constructed structures that have maintained the unequal class system that exists today. Social critical theorists claim that functional literacy is the priority in these methods, which simply allows you to work within the system but it does not address unequal power relations. Critical literacy, on the other hand, signifies learning to read and write as part of the process of becoming conscious of your own experience within historically constructed power relations and to challenge them. More specifically, critical feminist literacy strives for a space that incorporates social practice within a post-patriarchal discourse. Restructuring relations of power is a basic premise needed to end sexist oppression and to challenge the politics of domination of not only gender but also race, class, and ethnicity as well. Such discourse will be analyzed within the new Education

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Law in Bolivia, which has embraced a plan to institutionalize “anti-imperialist and anti-patriarchal” curricula in its public schools.12

**Project Outline**

This thesis will compare the new Education Law in Bolivia to the education policies and strategies implemented in Guatemala. The research will use a comparative case study model using the ‘Most Similar Systems Design’, a method which is derived from John Stuart Mill’s ‘Method of Difference’. The ‘similar systems design’ method uses countries that are “similar in a number of specified variables (the control variables) and different in regard to one aspect (the independent variable under study)”13. Both Bolivia and Guatemala are lower-middle-income countries that have struggled with large income disparities and inequality due to the hold on power by a very small group of elites that sustained oppressive policies and left the rural, indigenous populations largely excluded and politically unrecognized for most of post-independence history. However, the recent governments of Bolivia have pursued reforms focused on addressing the social and cultural needs of the indigenous population and have made strides in improving female literacy and gender parity at the elementary level.

The case studies will use both quantitative and qualitative methods to understand the historical background of each country. The economic indicators and strategies/methods that have prevailed in studies by international institutions and organizations since the 1990s will also be utilized and analyzed. My analysis will take into account the resurgence of leftist policies in

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Latin American caused by resistance movements in the region leading to more critical approaches and shifts in education policies as was the case in Bolivia.

The second chapter will provide a brief historical background as to why international institutions began to promote education. The scope focuses on the 1990s to present, but the historical analysis will require brief explanations and references to periods prior to the 1990s. The time frame when the International Declaration of Human Rights was created will be a starting point. Then, the economic problems of the Latin American region will be analyzed because they occurred along with the rise of neoliberal economic policy use and implementation in the international market system. The Structural Adjustment Programmes (SAPs) were dominant economic policy prescriptions during the 1980s. These prescriptions cut government spending along and increased privatization, liberalization, and deregulation. It is argued that these economic policies helped increase inequality and created social discontent, especially among indigenous communities.

The chapter will examine how the growing discontent in Latin America led to a shift in focus towards different policies in the 1990s that were suppose to address poverty alleviation and development. There was a focus on education lending that was meant to address gender gaps in education and literacy rates\textsuperscript{14}. The 1990 World Conference on Education for All was held to address concerns about inadequate basic education services, particularly in developing countries. Gender parity became an important issue as it was viewed as a necessary component to not just reaffirm the right to education listed in the Declaration of Human Rights, but also to address the issues of poverty and development. Economists used studies to show how high levels of female literacy, in particular, were correlated with higher than normal levels of human development.

\textsuperscript{14} Torres, 365-385.
Therefore, female literacy rates and primary education enrollment became important development strategies. These international objectives led to an increase in education aid by international institutions such as the World Bank to developing countries.

The second chapter provides an in-depth look at how international financial assistance influenced education policies, procedures, and reporting methods. Then, when the results were not achieved, the commitments to the methods were reaffirmed in 2000 with the Millennium Development Goals. This approach to education reform will be compared with the push for critical literacy and critical pedagogical methods that were also researched and written about during the same period. Scholars on both sides adamantly defended their approaches as a better way of addressing issues of poverty and development. Some scholars argued that the new focus on development and education by international institutions was used as a way to appease the anger and social unrest caused by the various economic crises that had spread throughout the Americas and resulted in dire poverty conditions for the poorer populations.

Bolivia and Guatemala are both developing countries with high poverty rates and high illiteracy rates especially among the indigenous groups. The World Bank created a report in 1992 on both Bolivia and Guatemala. The findings helped the two countries obtain aid to address their issues and meet development goals set by EFA and international institutions such as the World Bank, Inter-American Development Bank, and the U.S. Agency for International Development (AID). The report demonstrated significant similarities between the two countries in terms of three areas: ethnicity, education, and earnings. However, Bolivia has recently taken a


more leftist approach in terms of policies including education. Due to the similarities that will be detailed in the subsequent chapters, my comparative research project follows the framework of the ‘most similar systems design’\textsuperscript{17}. Women in both countries were heavily disadvantaged, even more so if they were indigenous, in terms of educational attainment in comparison to men. The gender disparities were very high in all literacy rates and primary education. The two countries began with the same problems and still have many of the same issues, but Bolivia has made a much more significant shift in terms of policy and governance. The policies toward education, while recently implemented, are expected to use critical pedagogy influenced by Paulo Freire.

Terminology will be explained and elaborated clearly in each chapter, but it is important to begin with some basic definitions of key terms to be used throughout this research project. Literacy is usually defined by most as the ability to read and write. Literacy can be viewed as a nonpolitical function, a skill obtained to provide opportunities and upward mobility. Critical literacy and pedagogical methods go beyond that basic understanding. Critical literacy is based on the pedagogical principles of John Dewey and Paulo Freire. For the purpose of this thesis, the definition used by Henry Giroux will be employed. This definition states that “Literacy is a discursive practice in which difference becomes crucial for understanding not simply how to read, write, or develop aural skills, but also recognize the identities of ‘others’ matter as part of a progressive set of politics and practices aimed at reconstruction of democratic public life”\textsuperscript{18}.

In order to understand the significance of the change and shift in educational philosophy, it is important to begin the comparative case study with Guatemala. It is the country whose

\textsuperscript{17} Anckar, 390.

educational policies have continued under the influence and guidance of the World Bank since funding in the 1990s. Chapters three and four provide overviews of the development models employed in Guatemala and Bolivia, focusing on the implications for their educational systems and the role of women within them. Chapter three provides a brief historical background of Guatemalan social and economic development and the organization of the national education system. A historical background is necessary to understand the struggle to achieve a more equitable society where all people have the right to quality education. The World Bank, the primary organization aiming to reach the MDGs of 2015, is still providing assistance and recommendations to the Ministry of Education in Guatemala in how to address issues of illiteracy and gender parity in primary education. The justification for recommendations tied to assistance remains the same, with the reliance on human capital theory for their argument. The resulting methods, along with their impact on the levels of human development, will be evaluated. Social, political, and economic factors will all be taken into account as they are all heavily influenced by education. The Human Development Reports of 2010 and 2011 will be used as sources of economic indicators such as the gini-coefficient and education expenditures as a percent of GDP. Guatemala is a country plagued by inequality, poverty and lack of education, particularly in areas that are often rural and indigenous. This inequality in access to opportunities is the reason for its long history of civil unrest and brutal repression, but the period following the Peace Accords has allowed for a more stable government. Still, the country has not moved in the leftist direction as have some countries with high indigenous populations and a history of social unrest.

Bolivia, on the other hand, has taken a leftist turn in terms of politics and social movements. Grassroots social movements led to the rise of its current leader, President Evo
Morales, the first indigenous president in the country. The historical background and the important social, economic, and political turning points that led to this outcome will be explored in Chapter four. Like Guatemala, Bolivia has also experienced social and civil unrest. In this case, however, the social movements have been more effective in drawing attention to the deficits faced by the indigenous population. While the country did receive aid for education from the conventional multilateral sources, it has really made a strong effort to ally itself with other leftist countries in the region. Bolivia’s main international partnership is with President Hugo Chavez of Venezuela. Bolivia remains a strong participant in the cooperation agreement between Venezuela and Cuba, and it has deepened its economic and social ties with Brazil, Ecuador, and Paraguay. The agreements among these countries have effectively removed the heavy influence of the World Bank and IMF in the policies pursued within their governments. They have found through economic crisis, that neoliberal prescriptions have often had dire consequences on society and the economy as well as the political party in power. The recent policy shift, especially in education, then needs to be analyzed. The most recent law in Bolivia regarding education was passed in December 2010, and has included gender issues maintaining a promise to provide empowering education that is not based on a patriarchal system. While Bolivia is still working to correctly implement the goals outlined in the law, my goal is to compare the law with the recommendations of critical theorists for critical literacy in the 1990s.

The final chapter will then outline the similarities and differences between the two countries. The chapter will also analyze the impact the leftist policies could have once implemented. The social, political, and economic barriers for the implementation of critical

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education will also be discussed. The purpose of this research project is to argue for the critical methods in education policies and practices as a better method of addressing not only gender disparities in literacy and education, but also for changing the historically imposed unequal systems that do not allow for a more just and equitable society. Critical methods are necessary to improve learning outcome, and provides the foundation for why learning and education are important and useful. Critical pedagogy allows students to embrace learning, and creates an environment of empowerment and reflection.

Historically, Latin America has struggled to fix its social, political, and economic problems but critical methods in education create the thinkers that can relate to the situation and provide viable solutions. This thesis will attempt to defend critical methods as not only more effectively promoting education for all but also for advancing quality education that creates real understanding and opportunity. Promoting equality and understanding is the reason the Declaration of Human Rights was created to begin with. Human Capital Theory methods only address issues of labor by teaching people to obtain skills to meet labor market needs. There may be improvements in terms of health and mortality with higher levels of education, especially for girls, but education systems have to change more profoundly if Latin America is ever going to be a developed region that is not susceptible to the phases of disequilibrium in the international market economy. The limitations to the argument lie within the newness of the new political direction taking place in Bolivia. Therefore, data will have limited potential in defending the theoretical perspectives. However, present policies will be analyzed in order to outline the potential for change in addressing not only poverty but gender equality.
Chapter Two
The History, Support, and Criticism of
Literacy and Education as a Development Strategy

The Historical Role of International Institutions in Development

Education has long played a crucial role in development strategies. Investment in education was seen as the key strategy in new initiatives for alleviating poverty and achieving development for all impoverished nations. The type of strategies implemented to create development seems to adjust to the needs and changes of each era. The notion of development itself goes back as far as the early post-World War II period, when international institutions such as the United Nations, the World Bank, and other various international agencies were created.

The IMF and World Bank, specifically, were created as a result of the UN Monetary and Financial Conference at Bretton Woods in 1944. The World Bank was initially named the International Bank for Reconstruction and Development with the term “Development” added as an afterthought. During this period most of the developing countries were still colonies or in the process of decolonization. However, by 1948, they realized European reconstruction was a larger task than anticipated. The United States, emerging as the more mature power, established the European Recovery Program also known as the Marshall Plan. The World Bank was then left with a minor role in reconstruction, and shifted its attention to lending to the developing region for economic development.

The focus of the IMF and the World Bank was primarily on ensuring global economic stability to prevent another economic depression. The policies of economist John Maynard

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Keynes had been implemented to adjust the economy to full employment levels\textsuperscript{22}. The ‘Keynesian’ fiscal and monetary policies were referred to as a form of political-economic organization referred to as ‘embedded liberalism’\textsuperscript{23}. These policies began to break down both internationally and domestically by the 1960s causing a serious crisis of capital accumulation that would last throughout much of the 1970s\textsuperscript{24}. Theoretical economic debates regarding Keynesian economics had always existed, especially between Keynes and economist Friedrich A. Hayek. The breakdown created an opportunity for a shift in economic policy. This shift would occur under the leadership of Milton Friedman, who was a member of the Hayek’s Mont Pelerin society, with the takeover of the Chilean economy.

The later termed ‘Chilean Miracle’ was led by young Chilean economists trained at the University of Chicago under Milton Friedman. The free market reforms had managed to create a positive economic boom in Chile after military leader, Pinochet, had ousted socialist President Salvador Allende in 1973\textsuperscript{25}. The economic turn was used to justify the need for more interventions in international economies using neoliberal policies. While there were various examples of economic “miracles”, most Latin American countries continued to struggle. Excessive loans had created problems with repayments when they were due creating the Latin American Debt Crisis in the 1980s\textsuperscript{26}. The ‘Chilean Miracle’ established a validation for more neoliberal restructuring in the Latin American region under the leadership of Ronald Reagan and Margaret Thatcher.

\textsuperscript{22} Stiglitz, 11.

\textsuperscript{23} David Harvey, \textit{A Brief History of Neoliberalism} (Oxford: University Press, 2005), 11.

\textsuperscript{24} Harvey, 12.


\textsuperscript{26} Vanden and Prevost, 167.
The neoliberal movement was focused on increased privatization and implementation of free market principles using Structural Adjustment Programs (SAPs) in an attempt to address the broad Latin American debt crisis. The SAPs would provide Latin American countries with loans to deal with the crisis but they had to implement necessary neoliberal reforms to balance their budgets. The SAPs in Latin America were “a laboratory for a huge experiment in promoting economic development through orthodox liberalism”\(^{27}\). The World Bank and IMF emphasized the need for downsizing government by cutting public spending through methods of privatization, deregulation, and trade liberalization. Since the policies were created by the IMF, the U.S. Treasury, The World Bank, and Wall Street, it was referred to as “The Washington Consensus”\(^{28}\). This new method was expected to remove responsibility for economic stability from government, and create a “trickle-down” free market system that would eventually reach the poor and lead to overall development. The SAPs arguably proved effective for middle-income export countries like Brazil, but poorer Latin American countries were not able to cope with the adjustments\(^{29}\). The experiment came at the expense of those in need of the most assistance and protections by their governments – the poor. The poor had to bear the largest share of the adjustment burden. This was due to the rapid privatization that opened markets for competition too quickly to create new jobs to replace the ones being destroyed. The result was rising unemployment and increased poverty\(^{30}\).

\(^{27}\) Cohn, 320.


\(^{29}\) Cohn, 322.

\(^{30}\) Stiglitz, 18.
The other criticism was due to the disregard of gender inequality and exploitation of women that was and is evident in almost all societies. The SAPs were not gender neutral, and did not take into account the subsidiary role of women. Women occupy various positions in society depending on their social class and ethnicity but there are certain challenges that most women face due to the lack of recognition for the work they do within the informal sectors and unpaid subsistence work in the household. This type of work is not counted when creating production statistics, nor is it adequately protected with enforced labor laws. In addition, the cutbacks in government spending on health, education, and water led to a higher burden on women to counter the effects in their community and households. The raising prices of food caused by international pressures to phase out food subsidies meant women also had to use cheaper foods that took longer to prepare. The cutbacks that were supposed to increase inefficiency only shifted the costs to the unpaid economy, where women contribute most of their work. In other words, women suffered the most under the adjustments, and the unreasonable burdens would contribute to the social movements that resisted the harsh structural conditions.

In addition to women, indigenous populations have a long history of oppression and exclusion. The indigenous communities tend to remain in isolated, rural areas. Isolation did not make them immune to the effects of neoliberalism and the SAPs. A report by Dr. Juliet A. Melville for the Caribbean Development Bank found the incidence of poverty in the sub-region to be high and more concentrated in rural areas. The shocks that came with the structural adjustments led to rising discontent and popular movements in countries that are home to ninety percent of Latin America’s indigenous peoples - Mexico, Bolivia, Guatemala, Peru, and

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31 Cohn, 323-324.

The conditions required mobilization in order for indigenous people to gain the political recognition necessary to allow changes to occur. Indigenous women were doubly affected, and became very involved in the social movements in order to gain recognition of their demands. Table 1 below demonstrates how movements were mobilized by peasants because of the dismantling of rural state programs.

### Table 1 Emergence of Indigenous Movements in Latin America: Overview of Argument and Cases

<table>
<thead>
<tr>
<th>Country</th>
<th>Opportunity: Political Liberalization</th>
<th>Incentive: State Reforms Challenge For Peasants</th>
<th>Local Autonomy For Amazon</th>
<th>Capacity: Pre-Existing Networks</th>
<th>Outcome: Indigenous Movements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>Partial opening 1988 on</td>
<td>Dismantling of rural state programs, 1980-1990</td>
<td>-------</td>
<td>Peasant unions &amp; church networks</td>
<td>Significant regional movements: i.e., EZLN</td>
</tr>
<tr>
<td>Guatemala</td>
<td>Uneven opening 1985 on</td>
<td>Dismantling of rural state programs after 1954 coup</td>
<td>-------</td>
<td>Peasant union is repressed, churches create new networks</td>
<td>Significant national movements: i.e., Majawi Q'í, CONIC, COMG</td>
</tr>
</tbody>
</table>


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The social movements created a disruption in the implementation of SAPs and there was a strong resistance to many recommendations made by international organizations such as the World Bank and the IMF. The World Bank and the IMF needed to change their negative image in order to maintain influence in the region as well as the stability of the international market system. While many argued that the negative effects of the neoliberal prescriptions were temporary, the growing levels of not only poverty but inequality created a serious problem and posed a serious threat to their argument. The Human Development Report was created in 1990 with the purpose of measuring and prescribing solutions to poverty and inequality. According to The Expert Group on Poverty Statistics, overall income inequality in Latin America had significantly increased during the 1980s and into the 1990s. In that time period, income inequality measured by the Gini coefficient had increased from an average of 0.25-.28 to 0.35-0.38.

A Shift in Development Strategies

The World Bank and IMF funded research projects to find new ways to address poverty issues. It was then that education and literacy became a strong focus for the new World Bank and IMF projects. Education and literacy were distinguished as a necessary achievement for economic and human development. Important economists made the case for education and literacy. The vast levels of illiteracy were areas of concern during the Education for All (EFA) in 1900 at Jomtien, Thailand. The EFA also recognized the gender disparities, and why it was important to address them.

In 1992, at the Development Economics Seminar of the World Bank, Lawrence Summers made the case for girls’ education, arguing that educating girls and women was a crucial

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investment to end the vicious cycle of poverty. Education was viewed as an investment in capital, human capital, which was necessary if a developing country was to have economic growth. Summers’ argument was based on the GDP growth that came with additional years of schools. The World Bank’s extensive research had demonstrated how female education could help address the financial issues of countries while also improving society as a whole by creating five important outcomes detailed in the following section. These five outcomes would change the vicious cycle of poverty into a virtuous cycle of growth and development.\textsuperscript{36}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure1.png}
\caption{Graph from Larry Summers, “Investing in All the People: Educating Women in Developing Countries” (Paper presented at a Development Economics Seminar at the 1992 Annual Meeting of The World Bank, Washington D.C., 1994).}
\end{figure}

\textsuperscript{36} Figure 1 Graph was recreated using Larry Summers, “Investing in All the People: Education Women in Developing Countries” (Paper presented at a Development Economics Seminar at the 1992 Annual Meeting of the World Bank, Washington, D.C., 1994), 6.
In this argument, education provides more economic opportunities. If girls are educated, their families will have more concern for their success and survival. Educated girls marry later, and have more of a voice in household decisions. They also have fewer children which allow them to invest more in their children’s health and development. This type of investment creates a higher probability that their children will escape poverty or at least gain some higher social and economic mobility. So, educating girls not only address the issues of female deprivation, but creates a healthier, more educated society over time.

The benefits then have a higher rate of return on investment than any other developing strategy. The most obvious return is the increase in productivity with a more skilled female work force that would be entitled to higher wages. In economic terms, there would be a ten to twenty percent increase in wages for each additional year a girl is in schooling\(^\text{37}\). The same occurs with boys’ wages but girls also generate particular social benefits.

One benefit is the reduction in child mortality. Educated women are more likely to pursue a healthy pregnancy and seek the type of medical attention required for a healthy baby to be born in. The next benefit, according to Summers, is that fertility rates are reduced. Women have fewer children because they are now involved in childbearing decisions. Then they have more input on the desired number of children. The third benefit is the reduction in maternal mortality rate. Similar to the first benefit or positive externality, educated women have more knowledge about health care practices needed to maintain a healthy pregnancy. The fourth issue that Summers brought up in the seminar is the prevention of the spread of AIDS. AIDS had just started to become an epidemic in the past decade, and the spread of the virus could be solved if empowered women took control of their lives and bodies. Educated women would be more likely to enter stable marriages and look out for their health. In the end, educated women are less

\(^{37}\) Larry Summers, “Investing in All the People: Education Women in Developing Countries”, 8.
likely to become prostitutes which World Bank research saw as an important contribution to the spread of AIDS. The conclusion was made by doing a comparative case study of urban Zaire and urban Zimbabwe, with Zimbabwe being the country with higher female school enrollment levels and lower HIV prevalence. The fifth benefit identified was environmental protection. Female education was claimed to have the highest return on investment in environmental benefits if undertaken by developing countries. Lower fertility meant less use of resources. The raised opportunity cost of women’s time discouraged them from clearing forests, and they more efficiently managed natural resources. Various case studies were used to support the World Bank’s push for girls’ education as a method of reaching growth and development. Literacy and primary education were viewed as important because it helped create academic success, and it was cheaper to start eliminating educational discrimination at the earlier stages.

Larry Summers had used the article “More Than 100 Million Are Missing”, the work of his fellow economist, Amartya Sen, in the opening of the seminar on girls’ education. In the article, Sen brought up the state of Kerala in India in defending the importance of having a society with high literacy rates and educated women. Amartya Sen further solidified the argument with the research findings he created with Jeane Dreze in his work on India. In India: Development and Participation, the case study of Kerala was more closely examined. The book illustrated the correlation between female literacy and higher levels of human development compared to other regions of India with the same economic conditions. High female literacy rates had created higher life expectancy, lower maternal and infant mortality rates, and greater social participation in the democratic process. Sen’s argument was also created from an

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38 Summers, 18-19.

economist lens where literacy and education are needed to create improved capabilities and bring up the value of human capital by producing a more skilled labor force. The research, however, also looked at how the importance of health and education not only improved commodity production but improved the quality of life and increased participation in democratic society. The latter would also be emphasized by critical theorists and feminist writers during the same time period.

Sen’s research in India supported investments in education and health because of its valuable connection to freedom. Literacy was specifically identified as influential in various instrumental roles towards economic development and social opportunity. Greater literacy levels played instrumental social roles by facilitating public discussion of social needs and encouraging informed collective demands. Greater literacy was also valuable for empowerment and distributive roles because citizens had an increased ability to resist oppression, to organize politically, and get a fairer deal. He used the state of Kerala as his main case study in support of this theory. Inequality in basic education signified inefficiency.

Kerala, unlike many regions in India, had a relatively higher female literacy rate, and this had created a very high quality of life despite lower levels of economic development. Kerala stood in sharp contrast to the rest of India in terms of gender disparities. Kerala had no gender bias in literacy in the younger age groups. When Sen compared India to China, he also pointed out that Kerala had higher literacy rates than any provinces of China. The higher literacy rates were correlated with the positive human development indicators. Kerala had an average life

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40 Dreze and Sen, 42-43.
41 Dreze and Sen, 14-15.
42 Dreze and Sen, 5.
expectancy of 72 compared to the average of 60 in India and of 69 in China. Infant mortality was also affected by higher female literacy rates with a rate of only 17 out of 1,000 live births in Kerala compared to the 79/1000 average for India and the 31/1000 average of China. Apart from the higher health indicators, women of Kerala were also more politically and socially active in their communities.

The focus on women’s agency has to be distinguished from the more usual concentration on women’s well-being. There are good reasons to pay particular attention to each in examining the requirements of economic development and social change in India. The persistence of sharp gender inequalities in many different forms is one of the most striking aspects of the Indian economy, and it yields disparities in the overall well-being of the population as well as difference in power and decision-making authority.

There was much for India to gain by investing in female literacy as the case study of Kerala clearly showed. However, economic challenges remained as Kerala had poor economic growth which Sen attributed to overregulated governance. The government’s economic policies were very hostile to market mechanism. The lack of economic opportunities led women to leave the state in search of economic opportunities elsewhere, and made Kerala dependent on remittances. According to Sen, the situation then limits a clearer idea of what economic gains can be made with proper economic policies that are conducive to market mechanisms.

Sen’s work has been very influential, but critics argue that the focus of international institutions relies solely on the human capital theory argument and not the other historically linked social and cultural aspects in his work. For example, Kerala has a long historical background of recognizing the status of women. This provided the foundation for women to

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43 Dreze and Sen, 3.


45 Dreze and Sen, 192-193.
actively participate within the community, and work towards more progressive democratic changes that met the needs of the community.

**The Feminist Perspective**

The shift in strategies for development by IMF and the World Bank came from social pressures. As stated before, there were criticisms about the lack of focus on gender equalities. Feminist theorists continued to be very critical of the female education and literacy strategies pursued under the influence and finance of international institutions. While there was a shift that created support for investment in education and decreasing the gender gap, neoliberal principals continued to be embedded in the policies pursued. In fact, feminist critiques focused on the reasons why the IMF and the World Bank had taken a sudden interest in women’s education.

The United Nations Educational, Scientific, and Cultural Organization (UNESCO) had an interest in universal literacy and education since its creation, because its purpose was to promote peace through collaboration. UNESCO had continued to be a strong influence and support of the new EFA and eventually MDGs, but the IMF and World Bank’s involvement was looked at with skepticism and mistrust. The IMF and World Bank justified their shift in development policies as an attempt to create development both human and economic. For feminists, the focus on how female education is viewed in terms of investment and savings does not take into account gendered economic relations. This perception reduces any potential effectiveness of the programs. Feminists take issue with Summers’ simplistic idea of a virtuous cycle that is partially attributed to a decrease in fertility rates. The idea of schooling as contraception is not upheld in the case of Bangladesh where fertility rates are falling despite the continuing marked gender gap.

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in literacy and school attendance. Education is definitely supported, but feminist theorists such as Nelly Stromquist think there is too much focus on gaining access while content is ignored\textsuperscript{47}. The feminist concern is not only on who is creating the policies, but also on what types of policies are being implemented, who is affected and how, and why these policies are being created.

The feminist analysis also looks at the impact the SAPs had on making the gender gap continue. In many countries, budget cuts in education had caused standard of living to fall making it difficult for families to invest in education. Economic survival also created a heavy reliance on child labor, and girls were often kept at home to help. The World Bank decided to increase lending into the education sector to address this problem, but the motive was misplaced. The motive was to encourage finance-driven education reforms, so reforms emphasized efficiency instead of equity issues.

The focus on increasing enrollment and creating universal literacy meant that investment focused on the primary school level. The secondary and tertiary levels, meanwhile, were sometimes privatized making it difficult for families to pay school fees (a strategy encouraged by the World Bank) necessary to attain competitive levels of schooling\textsuperscript{48}. If girls are at a disadvantage for primary school then higher levels are no different, and privatization limited opportunities for real change within a gendered society. It is also necessary to take into account what concerns and priorities women in these developing countries have regarding these policies. For indigenous women in Latin America, unequal access to education and health is a concern, but the lack of recognition for non-economic activities and indigenous values of sharing

\textsuperscript{47} Heward, 7-9.

knowledge and mutual exchange is a greater concern. The content embedded in these international policies and education methods are the problem because they do not recognize the legitimacy of their own knowledge and values⁴⁹.

A more recent analysis discusses the notion of engendering development, where the World Bank lays out a “market-centered” approach to gender equality. Gender equality is considered an important objective for economic growth. While the idea sounds good, Kerry Rittich states that these policies are only conforming to rather than challenging current norms. The important battles and debates regarding gender equality, including education, need to be conducted within the discourse of economic development⁵⁰. The controversy lies within the argument that gender equality is good for economic growth and vice versa. However, as the SAPs and crises in Latin America have shown, women tend to be at an economic disadvantage during these periods of economic disequilibrium. Gender equality initiatives are a matter of policy and cost/benefit analysis rather than a matter of “rights”⁵¹. If the focus is simply on incorporating women into the market system, it is not taking into account the historical institutions and issues that have left women at a disadvantage in society. It then is not addressing the protection of equal rights and freedoms, but creating a workforce that can meet market labor demands.

Due to these feminist critiques, scholars that support critical literacy often claim to address these inequalities that functional literacy alone does not address. A well-known feminist scholar and educator, bell hooks, wrote of the importance of using engaged pedagogy in

⁵¹ Rittich, 583.
education. This progressive, holistic educational approach was supposed to be more demanding than conventional critical or feminist pedagogy because it also emphasized the well-being of the student\textsuperscript{52}. Critical pedagogy is very similar to what bell hooks envisioned as both pedagogies have been influenced by the educator Paulo Freire. The pedagogies in the end have the same objective, which is to empower students.

**Critical Literacy: The Other Argument for Education**

Peter Lankshear and Peter McLaren’s work on critical literacy was primarily influenced by the critical pedagogical methods of Paulo Friere. If you search for the definition of the term ‘literacy’, you will commonly find it defined as “the ability to read and write”\textsuperscript{53}. Lankshear and McLaren identify three ways to think about the word ‘literacy’ and its definition. The first is to accept the common definition and its authoritative simplicity that lacks any theory or praxis. The second is to deny that ordinary language has authority, and assert there are differences between literacy and reading and writing to be recognized and reflected one way or another in theory and practice. The third goes farther by stating that “the truth is that some important insights have emerged within the field of literacy studies and the practice of literacy in the adult education arena, and the opportunity should be taken to make these known and to encourage their engagement and further elaboration by those who would identify themselves as concerned with literacy”\textsuperscript{54}. McLaren and Lankshear believe the third is necessary to put the term ‘literacy’ in the realm of substantive debate.

\textsuperscript{52} bell hooks, “Engaged Pedagogy” in *Teaching to Transgress: Education as a Practice of Freedom* (New York: Routledge, 1994), 14-16.


This critical literacy concept goes beyond the common definition of literacy. The common definition used in most dictionaries refers to the kind of functional literacy that is identified as necessary to be “employable” in the labor market\(^5\). Teaching and practicing literacy require going beyond the basic skills to understand the histories and the systems of hierarchy, race, patriarchy, and capitalism that have been created by it. The principles to learning to read and write should then follow Paulo Freire’s learning principles so that learners embrace the importance of print and its potency by the simple act of understanding the meaning. In obtaining this critical level of literacy, people would then not only meet practical needs of literacy, but engage in a level of reflection and action that would create social change and justice in an oppressive system. Learners can realize the possibility for “new makings” of reality, and the new makings can be a collective, shared, social enterprise where the voices of all participants must be heard\(^6\).

While the work by McLaren and Lankshear is primarily influenced by Paulo Friere, critical pedagogy can also be rooted to the critical theory derived from the work of the Frankfurt School. An article by Mary Breuing titled “Problematizing Critical Pedagogy” attempted to summarize the ideas of key critical theorists. Her summary of Theodor Adorno and the “Critical Theorists of the Frankfurt School” established in 1923, was as another form of social criticism that embraces Marxist views as related to education and literacy. Critical theorists of the Frankfurt school argued that the process of schooling withheld opportunities from students, and encouraged dependency through a hierarchical understanding of authority. This understanding then undermines the formation of any type of social consciousness that might bring about change


\(^6\) Lankshear and McLaren, 43.
or social transformation. The prevention of social action or transformation then allows for socio-economic inequality to continue, and is heavily focused on labor and economic conditions. This type of philosophy would then be reintroduced by the “New Left Scholars” in the 1980s. Henry Giroux formulated a critical pedagogy that used not only the critical theory of the Frankfurt School but also the more progressive elements of John Dewey’s philosophy on education.\(^{57}\)

John Dewey helped create the American school of thought known as pragmatism which favored a more naturalistic approach to acquiring knowledge.\(^{58}\) In *Chomsky on Democracy and Education*, Noam Chomsky identified John Dewey’s work as important in education and its ability to create social change. Reforms in early education were identified as an important force in creating a more just and free society.\(^{59}\) John Dewey’s ideas have many things in common with Paulo Friere so it is easy to understand the combined influence of these prior theorists and philosophers on the more recent, prominent advocates of critical theory and pedagogy.

Giroux and Peter McLaren both identified the way schools can transmit messages that are political, social, and economic. Education is not apolitical; it establishes certain social values and norms. Critical pedagogy can then be used to help students become educated, involved citizens. An active civil society has been identified as a necessary component in a democratic government, which is viewed by international institutions as crucial to development by ensuring the rights and freedoms of all citizens. This is where neoliberal ideology comes into play for these “New Left Scholars”. The concept of “freedom” has a central role in the culture, ideology, and politics of neoliberalism. These neoliberal principles are embedded in the international


institutions such as the International Monetary Fund (IMF) and World Bank. The idea of freedom is reduced to freedom from government restraints, and the right to consume whatever one chooses. Consumerism is viewed as an important ideal for a market economy and society where development can occur\textsuperscript{60}.

Critical pedagogy, on the other hand, would push students to think of a world and life outside the market system where people are not commodities and left extremely susceptible to changes of a market economy. In addressing feminist criticisms, Henry Giroux acknowledges how feminism has influenced critical pedagogy by asserting the power of social criticism\textsuperscript{61}. Feminist criticisms of critically pedagogy have not recognized the potential such education can have on opposing gender oppression through its resistance to the power of the private\textsuperscript{62}. While feminist scholars do not recognize the need to contend the power of the private, the domination of the private is repeated in this historical cheapening of women’s labor. The gender relations continue to be unequal in a public space where power is asserted and is still dominated by men. Women remain unacknowledged in the private space. The public and private divide then needs to be addressed by creating social change. Education and literacy need to create and do more than prepare students for a global, technologized labor market within the international market system. As Robin Goodman wrote:

\textit{Teaching girls calculus or physics or providing them with computers will not in itself end sex/gender oppression but might, without further critical or feminist engagement,}

\textsuperscript{60} Donald Maceo, Bessie Dendrinos, and Panayota Gounari, The Hegemony of English (Boulder, CO: Paradigm Publisher, 2003), 124.


\textsuperscript{62} Goodman, 23.
reinforce it, assimilating girls into an economic system that exploits sex/gender difference for a profit.\textsuperscript{63}

Critical instruction, especially in literacy, can help girls understand the historical processes that led to present gender relations and perhaps empower them to change it. If teaching girls functional literacy has made significant gains in the area of human development, imagine what changes can occur if critical literacy is obtained. Merely teaching girls to read and write without understanding the origins that contributed to their social and political inequality only maintains the system in place\textsuperscript{64}.

**Gender and Education in Latin America**

With female education becoming a central issue for development in Latin America during the 1990s, countries with large gender gaps in education were placed under a microscope and offered monetary incentives to address the disparity issues. In a study by UNESCO, an overview of gender equality in basic education for Latin America from 1990-200 was analyzed\textsuperscript{65}. Messina defined ‘basic education’ as “the level or stage of an education system that includes early-childhood, primary education, and the first phase of secondary education\textsuperscript{66}.” ‘Gender’ was defined as “a social construct that transforms differences between sexes into social, economic, and political inequalities\textsuperscript{67}.” If equality is based on principles of justice and freedom, then inequality is based on privilege and discrimination. This helps create an understanding for what

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\textsuperscript{63} Goodman, 153.


\textsuperscript{66} Messina, 12.

\textsuperscript{67} Messina, 13.
is expected in terms of gender equality in basic education. In the 1980s, research demonstrated that lack of any schooling in four countries ranged from half to almost all of indigenous women (See Table 2). During the 1990s, indicators illustrated that most Latin American countries had girls participating in basic education at near similar levels to and even slightly higher than boys. The problem in gender equality still came when identifying countries with high illiteracy rates and/or a high percentage of indigenous populations.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bolivia</td>
<td>95%</td>
</tr>
<tr>
<td>Guatemala</td>
<td>74%</td>
</tr>
<tr>
<td>Panama</td>
<td>53%</td>
</tr>
<tr>
<td>Paraguay</td>
<td>75%</td>
</tr>
</tbody>
</table>

George Psacharopoulos study of Bolivia and Guatemala also identified ethnicity as problematic when addressing issues of equality. In the report, poverty and low levels of education were associated with the indigenous community. In comparing non-indigenous and indigenous communities, the gap in education created large disparities in terms of income earnings. The research samples of Bolivia and Guatemala in this 1993 study showed that Bolivians were more educated than Guatemalans, but still had issues in terms of wages and earnings. The lack of wages and earnings still did not take away from the fact that basic

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68 Table created from Graciela Messina, “Gender equality in Basic Education in Latin America and The Caribbean (state of the art)”, UNESCO Regional Offices of Education for Latin America and the Caribbean, Santiago, Chile (March 2002): 17.

69 Psacharopoulos, 9
educational attainment improved their economic position. The study used human capital theory to explain the findings, in which each year of schooling or education created a return to the past investment in human capital. Lower levels of education then had less rewards in the labor market. Psacharopoulos did recognize the fact that the data driven report did not permit incorporating the issues of discrimination in respect to the earnings differential in the labor market. Still, the overall conclusion was that a high indigenous population led to lower levels of educational attainment and less labor market rewards compared to the nonindigenous population. Investment in education could create more economic opportunities for both groups, and the conclusion was sufficient for financial lending and projects by international institutions.

Therefore, both issues of gender and ethnicity needed to be addressed if the goals of Education for All and development were to be realized. A feminist NGO ‘boom’ had already begun in Latin America during the 1980s. The second wave of feminism created NGOs focused on popular education and women’s empowerment. Many NGOs provided services and advice to poor and working-class women. The new international development goals of the 1990s focused on addressing gender equality in basic education and illiteracy helped create a demand for gender expertise. There had been barriers and a lack of political representation in government so NGOs created a space for women to participate in.

Many national leaders in Latin America had pledged to enhance gender equity, and declared their intention to promote and incorporate women into development. Some governments, such as Bolivia, even began to establish laws establishing quotas to ensure female

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70 Psacharopoulos, 20.

representation in government positions\textsuperscript{72}. Basic education was better institutionalized during the 1990s and became linked to compulsory schooling. In identifying inequalities among indigenous groups, both boys and girls in rural regions had problems with grade repetition and dropping out compared to urban areas. The highest dropout rates, however, were held by indigenous girls in rural areas despite studies that have them exhibiting better academic achievement\textsuperscript{73}. The more interesting part was that there seemed to be gender equality in access at the early childhood level, but the inequalities or differences usually occur “after” entry into the education system. Then, numerical data alone cannot seem to address the reasons for the increase in gender gap with each additional year or level of schooling. Differences in treatment and sexist stereotypes are identified as the most difficult barriers to achieving gender equality\textsuperscript{74}. Addressing these forms of obstacles would mean changing the educational institutions within which students are taught. Perhaps a closer look at the two countries with high levels of poverty and indigenous populations that are pursuing similar goals using different methods will help address the obstacles and issues in regard to gender disparity in education and development.

\textsuperscript{72} Alvarez, 190.

\textsuperscript{73} Messina, 18.

\textsuperscript{74} Messina, 19.
Chapter Three
The Case Study of Guatemala
International Institutions and Education

Historical and Political Background

Much research has been conducted in addressing the gender disparities in education in Guatemala. However, if one is to understand the present issues of poverty and marginalization, it is important to understand the history of this Central American country. Guatemala is located just south of Mexico and is described as being slightly smaller in size than the state of Tennessee. Guatemala is distinct from the rest of modern Central America in that it is has a large, unintegrated indigenous population. The enormous Mayan indigenous peoples make up more than half of the total Guatemalan population. The indigenous population is dispersed throughout all regions, but historically concentrated in the western highlands called altiplano in primarily rural areas. Guatemala has a very diverse with an ethnic population that is 59.4% Mestizo, 9.1% K’iche, 8.4% Kaqchikel, 7.9% Mam, 6.3% Q’eqchi, 8.6% labeled as ‘other Mayan’, and .2% indigenous non-Mayan with 23 officially recognized Amerindian languages.

The indigenous population has a long history of being exploited and oppressed through colonization and a turbulent political history up to present day. For time purposes, we will focus on providing a brief historical account of political shifts since independence from Spain. This period is important to the education systems that would be implemented and remain unchanged.

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77 Jonas, 305-306.

for a long portion of time. Independence from Spain brought little change in regard to the societal hierarchies where indigenous peoples remained at the bottom. The Liberals took control in 1871 and dominated a majority of the time until the 1940s. This period focused on modernizing and investing in the infrastructure including roads, railways, a national army, and schools. The Liberals also opened up communal lands held by indigenous populations for cultivation by large landowners called latifundiatas. This was done in an attempt to create foreign investment in the region. This liberal phase forced many indigenous Guatemalans from their land and coerced them to work on coffee plantations. While indigenous populations suffered in these conditions, the business elite gained the majority of wealth and power.

By the 1940s, labor unrest and middle-class democratization pressures led to the election of an educator named Juan José Arévalo Bermejo in 1944. Arévalo wanted to create a modern capitalist society while addressing the root of the country’s societal issues which were attributed to the “liberal” reforms. This required implementing numerous reforms including a labor code, professionalization of the military, rural education, public health promotion, and cooperatives. In 1950, Jacobo Arbenz Guzman was elected to succeed Arévalo. He sought to continue the revolution’s social reforms. Arbenz’s reforms included the Agrarian Reform Law that shifted economic power toward workers and peasants. Farmland owned by latifundiatas and employers were confiscated and redistributed to 100,000 peasants.

These socialist reforms were noticed at the international level. It particularly affected the US-based company called United Fruit Company. The United States viewed Guatemala as a

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80 Booth, Wade, and Walker, 135-36.

81 Ibid., 136 - 137.
communist threat. The CIA intervened and staged a military coup through a disloyal army faction led by Colonel Carlos Castillo Armas. Armas replaced Arbenz and created a counterrevolution that revoked the Agrarian Reform Law, dismantled social movements by killing and jailing thousands, and maintaining a strong repression of the opposition\textsuperscript{82}. This did not stop new social movements from forming from the 1960s-1970s, and they were met with constant government repression\textsuperscript{83}. Guatemala spent the next almost four decades shifting from military to civilian rule as massive civil conflicts continued. This 36-year old conflict ended with the 1996 Peace Accords, but there was and is much to rebuild and overcome in terms of a democratic participation and trust. A report in 1999 by the Historical Clarification Commission found that more than 200,000 people had died during the conflict, and 1.5 million were displaced\textsuperscript{84}.

The Education System and Attempts at Reform

The history of education in Guatemala shows strong interconnectedness with the historical shifts in power within the country. During the liberal phase after Guatemala’s independence, educational reforms were implemented to create a democratic government where citizens were educated enough to know their rights and duties. Education was considered compulsory at the primary level. The reforms were characterized by systematization and centralization that represented an effort to homogenize instruction. All citizens need to know how to read, write, and count to fully exercise their rights. These skills were implemented by a

\textsuperscript{82} Booth, Wade, and Walker, 137.

\textsuperscript{83} Jonas, 311.

\textsuperscript{84} Booth, Wade, and Walker, 149.
centralized governmental institution called a ministry of instruction. It is essentially the creation of a public education system.\(^8^5\)

However, free and compulsory public education was only available at the primary level. Secondary education was neither free nor compulsory, and it was reserved for the ‘superior’ ranks of the population. The Liberal argument for this decision during this time was that the ‘inferior’ ranks had a lack of intelligence that would prevent them from knowing how to develop their intellect. The scholar, Eric Mulot, makes the argument that liberal reformers did not want education to divert their labor force away from the work needed for their agrarian capitalist reforms. The objective was to constitute a popular education that did not question the hierarchical organization that resulted from their established division of labor.\(^8^6\)

Under the leadership of Juan José Arévalo and Arbenz Guzman from 1944 to 1954, radical reforms were based on a reinterpretation of the reasons behind the economic inequalities and the capitalist division of labor.\(^8^7\) The structural equality could not be solved at the individual level, and had to be managed by social policies created by the State. While the number of schools in rural regions was increased to provide more access to indigenous peoples, the principles of organization of the education system remained unchanged. Therefore, the change was only quantitative and the principles of the educational liberal logic regarding the principles of hierarchy of the levels remained unchanged and unquestioned.\(^8^8\)

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\(^8^6\) Mulot, 77.

\(^8^7\) Mulot, 78-79.

\(^8^8\) Mulot, 80.
Once the right-wing military government removed Arbenz from power and took control in 1954, education and literacy gains suffered. A literate and educated indigenous population was seen as a threat to its authoritative rule. Consequently, education remained restricted to certain privileged Ladino population that lived in the cities or along the main road villages. Only during the brief democratic period before the 1954 coup were the issues of disparity in regard to education addressed. During the civil war, one third of the rural educational system (non-coincidentally predominantly indigenous) was negatively affected by violence. By the mid-1980s the rural educational system was in ruins which created very low levels of academic completion at the primary and secondary levels. Guatemala had one of the highest illiteracy rates in Latin America. The SAPs of the IMF and the World Bank further harmed the dire situation as public expenditures on education where continuously diminished from 2.4 percent of GNP in 1980 to 1.6 percent in 1990. Government investment in education also fell from 16.6 percent of GDP to an all time low of 6 percent in 1990.

The shift in World Bank policy in the 1990s would occur as poverty was still very rampant in Guatemala with more than two thirds of the population considered to be living in poverty and 58 percent categorized as living in extreme poverty. The poverty levels composed primarily of the indigenous population with over 90 percent labeled as poor. With female education as a primary strategy for development by the World Bank, and under heavy scrutiny by international organizations and social movements against the negative impact its neoliberal

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90 Poppema, 387.

91 Poppema, 387.
policies had on the poor during the 1980s, the World Bank used the 1992 study of Bolivia and Guatemala to strategize how to address ethnic and gender disparities in education. The technical paper was one of the first reports that recognized and recommended bilingual programs as a way to improve academic achievement at the primary level, but still emphasized the need for the indigenous population to acquire and learn in Spanish at the higher levels of education\(^\text{92}\).

Despite the World Bank’s initial report on education in Guatemala in 1992, the field of education would remain seemingly forgotten during the civil war. Once a peace agreement was reached in 1996, educational improvement became a significant strategy to renew Guatemala. The Ministry of Education began a program to address the goals of EFA with the creation of the PRONADE Programme (Spanish acronym for National Program for Self-Managed Educational Development) in 1994. This program focused on increasing access for three grades of primary education in isolated rural areas inhabited mainly by indigenous population groups. The PRONADE initiative was quickly financed and supported by the World Bank and other international financial lending institutions like the KfW German Development Bank\(^\text{93}\). The PRONADE education initiative would overshadow previous agreements that had occurred during the Peace Accords (PA) under the council of various civil society organizations representing the Mayan communities. The Accords included specific commitments that would help tackle the inequalities in Guatemala between the indigenous and non-indigenous as well as gender disparities. These discussions included an agreement to tackle maternal mortality rates,

\(^{92}\) Psacharopoulos, 19.

\(^{93}\) Poppema, 392.
malnutrition, and lack of access to education. These were all issues that would be later incorporated into the Millennium Development Goals.

During the PA meetings, Mayan academics and activists had allied with grassroots communities and teachers to articulate the discrimination towards Mayans and the need to take into account Mayan culture and language in education reform. In 1994, the First National Congress of Mayan Education was held, and the entitlements in regard to culture and community of the Mayan communities were discussed. The Peace Accords emphasized participatory mechanisms of decision-making for all of society in the policy changes that were required within the country - including involvement in the education system reform process. When the PAs were signed, two educational commissions were created to draft and implement education reform policy recommendations. The two commissions were the Parity Commission for Educational Reform (COPARE), which was in charge of drawing up a proposal, and the Consultative Commission for Educational Reform (CCRE), which would oversee the implementation and promote broad civil society participation.

The recommendations for obtaining a more socially just education system were created a few months after the Peace Accords were signed. The official Education Reform was presented to the government under President Arzu in 1998. The Education Reform found considerable barriers as it lacked support from the government and the Ministry of Education (MINEDUC). In the end, most of their proposals and recommendations were blocked, particularly those that


95 Poppema, 387.

96 Poppema, 388.

97 Poppema, 389.
favored the indigenous people, and instead the PRONADE program was created in 1997 and financed by the World Bank. Since PRONADE was completely a parallel organized program of self-managed schools, further involvement of civil society was avoided\textsuperscript{98}.

Members of the CCRE ended up feeling manipulated since the commission for the implementation of the agreement of the PAs was only used to legitimize the government’s own plans. In other words, the commission was created to provide a documented report of participation that met the terms of the Peace Accords. Once the commission proposed its findings, the government could put forth the program it had created with the help and support of the World Bank a year earlier. The debate regarding educational reform had become highly polarized as attempts at creating a more culturally aware and just system were opposed by the elite class still in a position of power. Elite opposition consisted of an influential conservative business sector, the military, and a mass media that argued the multicultural and intercultural aspects of the reform would fragment the nation. For these elite, a more uniform and universal education policy like that of PRONADE would be better for the country\textsuperscript{99}.

This argument would also hinder other initiatives that had gained support from various national and international organizations, such as the Maya schools. The Maya schools’ main aim was to create new opportunities for indigenous children without making them sacrifice their language and cultural identity. The Maya schools were considered to be pioneers in educational innovations with its bottom-up community-based approach. A decade since the Peace Accords, however, funding for the Maya schools initiative has been much more difficult, with significant amounts of funds diminishing. They had gained substantial support during the PA negotiations, but after the Accords were signed the funds, particularly those provided by the international

\textsuperscript{98} Poppema, 390.

\textsuperscript{99} Poppema, 390.
sector turned out to be very short-termed. Since the Maya schools had no support from the government, insufficient funds plagued further expansion and implementation. The supposed success of the PRONADE program as reported by the World Bank also drew attention away from these successful education programs.

**PRONADE and the World Bank agenda**

There are currently three models that share the education scene in Guatemala. The most common and most supported by the state is the assimilationist model. The assimilationist model aims to integrate the indigenous peoples into the dominant Castilian-speaking culture. The second is the bilingual model. This early transitional model prioritizes teaching students in their mother tongue in the first three or four grades of elementary school then transitioning them into Spanish instruction. The bilingual model does not allow for a curricular transformation from below so the content taught is similar to the assimilationist model, it is simply translated. The third is the Mayan or indigenous model that seeks to incorporate indigenous culture and knowledge into the curriculum. The goal is to preserve cultural identity while creating a foundation on which to approach Western knowledge. The first two receive more support from the state while the third comes from contributions from local communities and international support. The PRONADE program is identified as following the third model but there are issues with this identification.

The PRONADE initiative was claimed to be a success as net enrollment rates increased from 72 percent in 1996 to 89 percent in 2003. The government also claims that if the gains

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101 Poppema, 392.
continue, Guatemala should be able to meet the 2015 deadline for the EFA and MDGs. Despite the reported gains, there are problems as education levels are still the lowest among girls in poor, indigenous families which are supposed to be the areas targeted by both EFA and the MDGs. The following data will help us understand some of the aspects of the PRONADE spending and coverage as illustrated by the “Case Study Meeting EFA: Guatemala PRONADE”, a report by USAID (See Table 3, Fig. 2, and Table 4).

<table>
<thead>
<tr>
<th>Year</th>
<th>Schools</th>
<th>Students</th>
<th>Teachers</th>
<th>Joint Directors</th>
<th>Instituciones de Servicios Educativos</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>477</td>
<td>27,730</td>
<td>564</td>
<td>N/A</td>
<td>N/A</td>
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<td>1997</td>
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<td>1998</td>
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<td>124,240</td>
<td>3,011</td>
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<td>1999</td>
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<tr>
<td>2001</td>
<td>3,423</td>
<td>310,119</td>
<td>10,091</td>
<td>3,423</td>
<td>17</td>
</tr>
<tr>
<td>2002</td>
<td>3,419</td>
<td>321,629</td>
<td>10,560</td>
<td>3,419</td>
<td>19</td>
</tr>
<tr>
<td>2003</td>
<td>4,162</td>
<td>386,038</td>
<td>12,641</td>
<td>4,114</td>
<td>26</td>
</tr>
<tr>
<td>2004</td>
<td>4,555</td>
<td>445,003</td>
<td>14,579</td>
<td>4,555</td>
<td>20</td>
</tr>
<tr>
<td>2005</td>
<td>4,633</td>
<td>455,185</td>
<td>14,955</td>
<td>4,633</td>
<td>N/A</td>
</tr>
</tbody>
</table>


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Table 3 demonstrates an increase in not only the number of PRONADE schools but also enrollment. Figure 2 demonstrates how PRONADE has been implemented in rural regions. While schools and enrollment have increased the government still holds a higher percentage using traditional schools. Table 4 then demonstrates how the costs and completion rates are close in comparison even though government schools have a much larger budget. The increase in schools and enrollment, along with the cost comparison is provided as evidence of PRONADE’s success. Other studies made outside of USAID and the World Bank found significant problems with this reported successful initiative.

As mentioned earlier, the PRONADE initiative was drafted and approved without the involvement of official PA commissions. Other civil society organizations and teacher unions were also not included in the discussion of the project. The main participants in the creation of the PRONADE programme were the educational experts of the World Bank, MINEDUC.
officials, staff of the neoliberal think tank CIEN, and some academics that shared similar educational visions with the World Bank. The goals in formulating the education project were created to meet demands of an open global economy where human capital could be improved for the expansion of a skilled labor force\textsuperscript{103}. The specific objectives were to increase access to primary education in rural, isolated areas inhabited by indigenous population through a decentralized system of self-managed schools that would be primarily administered or run by parents. It was this aspect that made them a community-based system.

The PRONADE education system is not part of the public education system, but ran parallel to it. Management at the department level is contracted by privatized Educational Service Institutions (ISEs) which are either NGOs or private companies, and which consult the communities and parent committees in Coeduca. The Coeduca are parent-run committees that are responsible for hiring and paying teachers as well as monitoring attendance. They are also responsible for buying and distributing snacks and learning materials. Essentially, the consultants are training parents to manage schools. Only 25 pre-registered children are required to establish a school that parents will also be responsible for maintaining. All of these responsibilities and jobs carried out by parents are not paid but voluntary work. Parents are often among those classified as poor, yet they sacrifice time and money to make sure their children get an education. In the study carried out by Margriet Poppema, parents complained about the norms and regulations of the PRONADE programme, reporting that they are simply “executors of top-down demands and regulations”\textsuperscript{104}. Still, parents remain silent out of fear that any criticism will create an end to funding that would leave their children without education.

\textsuperscript{103} Poppema, 392.

\textsuperscript{104} Poppema, 394.
Meanwhile, the World Bank claims that the parent councils help them have more control over issues so the specific needs of their children are met\(^\text{105}\).

Teachers in the program also face a difficult teaching environment in what they describe as infrastructures that are often worse than public schools. They work on yearly contracts so there is no job security, and they are not allowed to join any existing teacher unions. The volatility and turnover of teachers is three times higher in these schools than for teachers in public schools (which is very similar to how charter schools function in the United States). The problem with this volatility and turnover rate is a neoliberal method that helps keep wages in this type of system very low as teachers know they are disposable. It is no surprise that many interviewed expressed a preference to work for the public school system\(^\text{106}\).

The public school system is not that much of an improvement because parallel programs help justify keeping investment in the public education system low. While the Education for All update claims that from 2000 to 2005, the government of Guatemala doubled its public education spending from $362 million to $611 million, which is still a very modest as a percentage of GDP\(^\text{107}\). A comparative study of the region identified Guatemala as allocating the smallest portion of its resources to education than any other Latin American country. Most countries in Latin America spend around 4.5 percent of their GDP on public education while the budget of Guatemala’s Ministry of Education was around 2 percent in 2009\(^\text{108}\).


\(^{106}\) Poppema, 394.

\(^{107}\) Porta and Laguna (Education for All Monitoring Report, UNESCO 2007): 5.

\(^{108}\) Menkos, et al., 17
More importantly, reports show that Guatemala is only partially meeting the EFA and MDGs requirements that World Bank says it is on track to meet before 2015. The focus on creating gender parity still has not been achieved, and it is one of the few Latin American countries where the gender disparities are more visible\textsuperscript{109}. Guatemala is reported to have the greatest disparity between boys and girls at the primary level\textsuperscript{110}. In many of Guatemala’s government policies, gender is not specifically mentioned as a goal despite the fact that in the PAs education reform equality to overcome the divides mentioned not only indigenous and rural areas in particular but gender as well\textsuperscript{111}. Also, while access to and expansion of services have occurred, quality has remained very substandard.

**Critical Analysis of PRONADE and International Influence**

While most international institutions and agencies support the policies of the World Bank, they acknowledge the lack of attention to quality in education in targeting the specific EFA and MDGs. Yet these prescriptions do not require a shift in the policy methods that are pursued. They simply recommend providing more monetary assistance and teacher training. In theory, more money will improve numbers by increasing access for all children, and more training for teachers will address quality issues. The theory does not then identify the specific issues described in Margriet Poppema’s analysis of the PRONADE programme. They still base success rates on increased numbers. Since the enrollment for both boys and girls at the primary level is increasing, and the gender gap is closing, they feel the programs are working. These number-driven reports lack in-depth analysis into other issues that go further than enrollment rates such as what it means to be literate (as different methods and theories view literacy

\textsuperscript{109} Burley, 3

\textsuperscript{110} Menkos, et al., 11.

\textsuperscript{111} Poppema, 395.
differently). Furthermore, this type of analysis does not take into account retention rates or completion above the third grade level.

In my view, the Maya schools would have been a more adequate form of the third model of education in Guatemala. The Maya schools needed the funds that went to PRONADE in order to continue implementing a more accurate form of the third model. The PRONADE initiative overshadowed the intercultural purpose of the Maya schools, and did not effectively emulate it. The PRONADE project created more pressures for the community with the excessive responsibilities that came with following complex international policies and budgets. This method then does not follow the community-driven approach proposed by the Maya schools.

The decentralization process underwritten by the World Bank finance of the PRONADE programme is also preventing a greater increase in government education spending in Guatemala. Since the World Bank provides a strong financial backing for the government, the changes in the public education system have not been very substantial. It is these neoliberal policies that are embedded into World Bank policies that are hindering real change, as many critics have pointed out. The decentralization of programs promotes reduced spending on social safety nets, and thus hurts the population it claims to be helping. It is also not doing much to address gender disparities and other gender-related issues. Educating girls is supposed to have social and economic high rates of return yet the “Rights or Privileges? Fiscal Commitment to the Rights to Health, Education and Food in Guatemala” report claims that maternal death rates are still high compared to other Latin American countries and malnutrition as well as illiteracy remain significant problems. These are all things that were supposed to improve under EFA and MDGs, but have yet to make significant gains.

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112 Menkos, et al., “Rights or Privileges? Fiscal Commitment to the Rights to Health, Education and Food in Guatemala”.
Most critics, including feminist scholars, also point out the neglect of education quality in policy initiatives such as PRONADE. As pointed out earlier, the World Bank policies tend to focus on addressing the needs of a global economy without recognizing what women contribute outside the labor economy. The policies promote this ‘girl-citizen’ that is encouraged to acquire entrepreneurial and self-management skills, but do not provide quality education for real opportunities that can create change\textsuperscript{113}. This raises the question: is creating gender equality in primary education really helping women if policies are economically focused? If World Bank goals are focused on meeting demands of the global economy, they are focused on meeting the labor market needs and not gender issues or poverty. Incorporating women into the labor market with only a primary education places them at low paying jobs that can be very susceptible to economic downturns. In fact, women are often the ones that suffer the most in economic crisis\textsuperscript{114}. The global capitalist system is very volatile, and crises are inevitable (making women’s susceptibility to crisis unavoidable as well)\textsuperscript{115}.

Then, there remains lingering impacts from the SAPs on the indigenous women. The low investment in public education and the increase in finance-driven World Bank policies have created little space within which indigenous women can really participate in gender education and development discussions. International education policies ignore the real needs of women that vary among communities whether indigenous or not. In the case of Guatemala, where

\textsuperscript{113} Notion of ‘girl-citizen’ obtained from Kellie Burns, “(re)Imagining the global, rethinking gender in education,” \textit{Discourse: Studies in the Cultural Politics of Education}, Vol. 29, No. 3 (September 2008): 343-357.


\textsuperscript{115} David Harvey, \textit{The Enigma of Capital}, (New York: Oxford University Press, 2010).
indigenous females are at a particular disadvantage, their concerns, values, and needs, which are often outside the economic sphere, continue to be ignored\textsuperscript{116}.

A UNDP report looking at the human development in Guatemala only lists seven gender-related laws approved in Guatemala from 1996-2009. Only one of the seven was focused on protecting women’s right to an education, and it was created in 2002\textsuperscript{117}. The implementation of laws is another question to consider. Ruth Moya Torres uses the Peace Accords of 1996 as an example. The Mayan people had concentrated their struggle in two areas during the peace talks. The first was to achieve a legal standard that protects their educational and cultural rights, as well as transforming the educational bureaucracy so that bilingual and intercultural education could be implemented. The second was to gain a sense of well-being that centered on the legalization and adjudication of lands. Yet a 2007 report by the National Permanent Commission of Education Reform found that despite the proliferation of legal standards addressing bilingual education, these laws had not been carried out\textsuperscript{118}.

**Overview of Guatemala’s Economic and Social Indicators**

Before concluding the case study of Guatemala, it is important to look at the most recent economic and social indicators. This will help create a better comparison in the final chapter, and it will help analyze the varying arguments. The data will help identify whether human capital theory is creating its intended effects, such as whether or not it is helping address gender equality in education and if social indicators are improving (See Tables 5, 6, and 7). The


criticism of PRONADE provides certain arguments that may or may not be seen using economic and social indicators, but it will hopefully create an easier visual snapshot at the situation in Guatemala.

Table 5. Selected Economic Indicators for Guatemala

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP – Real Growth Rate</td>
<td>3.8% (2011 est.)</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>4.1% (2011 est.)</td>
</tr>
<tr>
<td>Population below poverty line</td>
<td>54% (2011 est.)</td>
</tr>
<tr>
<td>Distribution of family income - Gini Index</td>
<td>55.1 (2007)</td>
</tr>
<tr>
<td>Budget:</td>
<td></td>
</tr>
<tr>
<td>Revenues</td>
<td>$5.54 billion (2011 est.)</td>
</tr>
<tr>
<td>Expenditures</td>
<td>$6.86 billion (2011 est.)</td>
</tr>
<tr>
<td>Public debt</td>
<td>24.5% of GDP (2011 est.)</td>
</tr>
</tbody>
</table>


Table 6. Selected Social Indicators for Guatemala

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population growth rate</td>
<td>1.948% (2012 est.)</td>
</tr>
<tr>
<td>Maternal mortality rate:</td>
<td>110/100,000 live births (2008)</td>
</tr>
<tr>
<td>Infant mortality rate:</td>
<td>25.16 deaths/1,000 live births</td>
</tr>
<tr>
<td>Life expectancy at birth (total population):</td>
<td>71.17 years</td>
</tr>
<tr>
<td>Health expenditures:</td>
<td>5.7% of GDP (2009)</td>
</tr>
<tr>
<td>Education expenditures:</td>
<td>3.2% of GDP (2008)</td>
</tr>
<tr>
<td>Literacy (defined as age 15 and over that can read and write)</td>
<td></td>
</tr>
<tr>
<td>Total Population:</td>
<td>69.1%</td>
</tr>
<tr>
<td>Male:</td>
<td>75.4%</td>
</tr>
<tr>
<td>Female:</td>
<td>63.3% (2002 census)</td>
</tr>
<tr>
<td>School life expectancy (Primary to Tertiary Education)</td>
<td></td>
</tr>
<tr>
<td>Total:</td>
<td>11 years</td>
</tr>
<tr>
<td>Male:</td>
<td>11 years</td>
</tr>
<tr>
<td>Female:</td>
<td>10 years (2007)</td>
</tr>
</tbody>
</table>

Table 7. Breakdown of Literacy Rates by Gender, Area, Ethnicity, and Poverty (Percentage)

<table>
<thead>
<tr>
<th></th>
<th>Population Ages 15 and up</th>
<th>Youth Age 15 to 24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>60.3</td>
<td>68.2</td>
</tr>
<tr>
<td>Gender:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>69.7</td>
<td>77.2</td>
</tr>
<tr>
<td>Female</td>
<td>51.7</td>
<td>60.2</td>
</tr>
<tr>
<td>Area:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Urban</td>
<td>79.6</td>
<td>83.5</td>
</tr>
<tr>
<td>Rural</td>
<td>48.2</td>
<td>56.9</td>
</tr>
<tr>
<td>Ethnicity:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indigenous</td>
<td>35.6</td>
<td>50.1</td>
</tr>
<tr>
<td>Non-indigenous</td>
<td>73.8</td>
<td>79.4</td>
</tr>
<tr>
<td>Poverty Level:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extreme Poverty</td>
<td>37</td>
<td>39.9</td>
</tr>
<tr>
<td>Above Poverty Level</td>
<td>79.3</td>
<td>82.8</td>
</tr>
</tbody>
</table>


Table 7 demonstrates the gap is closing. However, Tables 5 and 6 demonstrate poverty is still an issue, and the literacy gender gap remains significant despite heavy investment by the World Bank. The more in depth analysis in this case study of Guatemala demonstrates the policy prescriptions have not created substantial progress in either areas of gender equity or poverty reduction. While disparities may have improved by increasing access to the historically oppressed and excluded indigenous population, the increase is purely quantitative as quality education is still significantly lacking. The focus on decentralization programs by the World Bank has decreased the role and accountability of the state within the public education system by limiting the influence that national civil society can have on vocalizing needs to government. The claimed success of initiatives like PRONADE assisting in meeting EFA and MDGs by or before 2015 is more symbolic than a real victory.
The health and economic benefits expected to occur by creating equity at the primary level of education have yet to materialize. The focus on primary education limits economic opportunities to low-level employment positions that are very susceptible to economic downturns. Also, the focus is on increasing access when it should also take into account the quality of content. The contribution and needs within the non-economic sector are also not taken into account, and could be an area where improvements in conditions for women and the poor could occur. In the end, international influence, such as the policy prescriptions in primary education by the World Bank, limit and even hinder progress in addressing gender issues, improving education, and creating poverty alleviation when they are focused solely on quantitative not qualitative data.
Chapter Four
The Case Study of Bolivia
Impact of Social Movements on Education

Historical and Political Background

Bolivia is a landlocked country in Latin America that is considered one of the most ethnically diverse countries in the hemisphere with a population that is approximately 62 percent indigenous. The ethnic breakdown of the population is 30% Quecha, 30% Mestizo, 25% Aymara, and 15% White. The official languages are Spanish, Quechua, and Aymara. Apart from the large ethnic and linguistic diversity, Bolivia is also large in size. Bolivia is the sixth largest country in Latin America with a length that is approximately twice the size of France. Bolivia is very rich in resources yet remains among the poorest countries in South America. It is a land of ancient indigenous civilizations with geographical and social contrasts that have created a persistent tradition of political instability and revolution to redress social inequalities and historic oppression of its majority indigenous population.

Bolivian governments rarely carry out entire terms because of constant shifts of power through violent coups, oppressive dictatorships, and destabilizing protests. Despite the constant shifts over the last five centuries, political and economic power has continuously been maintained in the hands of a small elite group. This continued hierarchical position of power has historically been at the expense of the indigenous population. The rise of Evo Morales has created a new shift with the promise of a more equitable society where the indigenous population


will no longer be marginalized. Evo Morales has also stated his attention will not only address ethnic inequalities but gender inequalities as well. This section will provide a historical background to help understand the social movements that led to the rise of the first indigenous president, and how education remained inaccessible to many indigenous peoples for a long period of time. There will be a brief description about Bolivia’s post-independence but the focus will be from the 1980s forward as it marked a transition that would lead to democratic rule in the 1983. The period from the 1930s onward will also be of importance in terms of the education system and reforms in the following section. The purpose is to continue to make the argument that education is very much political in nature.

After Bolivia gained independence in 1825 it would remain in political turmoil as military strongmen know as caudillos fought for control. A republican government based on civil rule would be implemented in 1880 and last until the Chaco War of 1932. This period was centered on competing elites and their political parties representing special ethnic and class interests. Two major political parties, the Conservative Party and Liberal Party, were created. Both parties represented civilian rule of the predominantly white privileged class. Despite franchise limited to less than 5 percent of the population, both parties believed the constitutional government would bring stability and national unity needed for economic prosperity. However, the country experienced a deep economic and political crisis in 1930 because of a crash in global tin prices that political oligarchies depended on. Revolts and a “constitutionalist”


123 Morales, 571.

124 Morales, 573.
revolution followed, leading to the presidency of Daniel Salamanca, whose aggressive foreign policies would lead to the Chaco War\textsuperscript{125}.

The Chaco War was a territorial dispute that led Bolivia into war with Paraguay. The war created the social and political preconditions for the revolution in 1952. Meanwhile, the end of the Chaco War in 1935 ushered in a fundamental social change that swept away the tin oligarchy and traditional political class. The gradual integration of the indigenous peoples began during this postwar period. The 1938 Constitution established the social function of private property and state control over the economy along with educational reform that promised free, universal education to all\textsuperscript{126}.

The postwar radicalism threatened the oligarchy. They quickly formed a coalition that included a conservative military to regain control of the presidency in 1940. The oligarchy and military repressed all social opposition up until the 1952 revolution. The most notable outcome of the revolution was the abolishment of literacy tests required to have the right to vote. This created a large number of eligible illiterate indigenous voters. This period also suffered another economic crisis because of cuts in U.S. tin quota. The U.S. provided the most generous amount of aid in the region to Bolivia to help the economy recover from the crisis, but it was conditional and served to control the outcome of the revolution\textsuperscript{127}.

The transition into democratic rule after military rule happened in 1982 with the election of Hernan Siles. During this period, the populist government struggled to resolve the severe economic crisis that engulfed Latin America. It had inherited a $5 billion foreign debt and could

\textsuperscript{125} Morales, 574.

\textsuperscript{126} Morales, 575-576.

\textsuperscript{127} Morales, 578-579.
not make its interest payments. In 1984, it accepted an IMF stabilization program that required neoliberal austerity policies to control inflation. Many workers lost their jobs, and close to 2 million Bolivians faced starvation\textsuperscript{128}. Vast demonstrations and social movements resulted from the SAPs created for Bolivia. Of particular importance within these social movements was the indigenous movement and its rejection of increased privatization implemented through IMF conditionalities and the Law of Capitalization. The indigenous resistance recognized how the globalization agenda of the technocratic and westernized political leaders was only for their personal benefit and the benefits of foreign corporations. The economic model of the 1980s came at the expense of the popular classes, and their resistance led to a shift in policies with the 1994 and 1995 constitutional reforms. The reforms increased popular participation, and created a powerful indigenous civil society that would help create a populist democracy and lead to the presidency of Evo Morales in 2006\textsuperscript{129}.

**The Education System and Attempts at Reform**

By the time Evo Morales had been elected, the reforms of the 1990s had already helped make education more accessible. However, there had been a long history of attempts at creating education reform to make literacy and education accessible to indigenous communities. The first known attempt at education reform came in 1931 with the Warisata community schools. Up until the 1930s, schools were not available to the indigenous population. Literacy requirements for voting and gaining government positions kept the indigenous peoples from democratic participation during the republic government period\textsuperscript{130}. The creation of the school-community of Warisata in 1931 came after a long process of advocating for indigenous schools. The ability to

\textsuperscript{128} Morales, 582.

\textsuperscript{129} Morales, 585-590.

read and write was identified as necessary to defend themselves and regain their lands. Two educators, Avelino Siñani and Elizardo Perez, created the principal characteristics of the Warisata School. Siñani was Aymara and Perez was a teacher committed to indigenous self-education\textsuperscript{131}.

The Warisata School was built by the indigenous community working in shifts, providing both materials and labor to create an immense two-story building. Communal assemblies were established to decide the building design, organized the school activities and curriculum, and administered the school. Teaching took place outside and inside the school, and children also participated in the school’s maintenance as well as decision-making in the school’s daily function. The school was very much part of the community and contributed to strengthening it by validating indigenous identity and community culture. The model was very successful, and before long was replicated around the country. By 1940, the government put an end to the school community and closed down the institution. The success of the program was seen as a threat to the established and oppressive political system. Teachers were persecuted and the site was ransacked. This movement towards education was slightly recovered with the 1952 revolution\textsuperscript{132}.

The ‘National Revolution’ of 1952 led to massive inputs of capital into health and education to develop a more modern system. The investment into the infrastructure came from U.S. aid that did not come without costs. Bolivia had to open itself to private American companies that operated overseas\textsuperscript{133}. There were still gains made by indigenous communities.


\textsuperscript{132} Zibechi, 318-319.

\textsuperscript{133} Klein, 219.
The Educational Reform of 1955 allowed for rural schools to open and spread throughout the nation. The schools followed the tradition of the schools from the 1930s. A piece of land was designated for the construction as well as a plot for cultivation that was a source of food for teachers. Pablo Regalsky and Nina Laurie argue that beginning with this period, schools helped introduce new institutionalized forms of authority. Rural schools were created, but the state attempted to have it function as a political tool to create a homogenized identity that represented the hegemonic political culture. The tensions and conflict regarding the overlapping territorial jurisdictions between ethnic authorities and the state would continue into the 1980s. The result of the conflict would lead to the 1994 Bilingual Intercultural Educational Reform.

Before the 1994 educational reform was created, gender had begun to play an important role in implementing international development goals. Poverty and low levels of education were higher among women than men. In the 1990 EFA conference report, females needed to be a priority because of their special role in “the intergenerational transfer of knowledge, attitudes, and behavior”. The other reason was because it was believed that educating girls and women would control rapid population growth, which international institutions believed exacerbated issues of poverty, poor health, and the absence of well-being. Educating women and girls would improve human development conditions, which according to human development theory,
would also lead to economic development. These issues would eventually come under heavy criticisms by feminists, but the implementation of the goals led to the conceptual framework of “women in development” in Bolivia’s government agenda.

The Bolivia Education Reform Project of 1994 was funded in part by the World Bank, the Inter-American Development Bank, and other multi-lateral organizations under President Sanchez de Lozada. The education reforms were aimed at promoting a multicultural, multilingual, common core curriculum that would meet the needs of all Bolivians to support a more pluralist, democratic learning experience. The reforms were expected to transform Bolivia’s school system by creating “equal opportunities” where intercultural values and gender equity were intertwined. The inclusionary practices were expected to address school retention of not only the indigenous population but also girls where the school retention rate was the lowest. In doing so, the reform on gender equity in education highlighted three issues that needed to be addressed in the curriculum: 1) identity and self-esteem conditioned by stereotypes; 2) sexual division of labor, and inequitable allocation of responsibilities between men and women; and 3) historical discrimination against women in the social, political, and scientific spheres.

The reforms were supposed to foster democracy and social equality through this concept of interculturality. Interculturality went beyond recognizing or simply co-existing with other

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140 Steele, 25.

141 Contreras and Simoni, 15.
cultures, and instead advocated for sharing and interaction among cultures\textsuperscript{142}. The reforms were to be integrated slowly as the transformation of the education system would take time.

Therefore, it was not entirely surprising that Bolivia was not able to meet the goals of Education For All. While the goals were then incorporated into the MDGs with a new deadline of 2015, the World Bank studies found that an increase in literacy and education retention was occurring. Therefore the education reforms in Bolivia were seen as an overall success. Below is a table recreated from the Contreras and Simoni study under the World Bank regarding the impact that implementing The Bolivian Education Reform from 1992-2002 had on illiteracy rates\textsuperscript{143}.

\begin{table}[h]
\centering
\begin{tabular}{|l|c|c|c|c|c|c|}
\hline
Geographic area and gender & 1992 (1) & 1996(2) & 1997(2) & 1999(2) & 2000(2) & 2001(3) \\
\hline
Total for Bolivia & 20 & 16.6 & 15.2 & 14.8 & 13.8 & 13.3 \\
Men & 11.8 & 8.5 & 8.4 & 7.5 & 7.4 & 6.9 \\
Women & 27.7 & 23.9 & 21.6 & 21.7 & 19.6 & 19.4 \\
\hline
Urban area & 8.9 & 7.2 & 7 & 5.3 & 6.3 & 6.4 \\
Men & 3.8 & 2.5 & 2.5 & 1.7 & 2.5 & 2.5 \\
Women & 13.5 & 11.4 & 11 & 8.6 & 9.6 & 10.1 \\
\hline
Rural area & 36.5 & 32.2 & 29.7 & 33.8 & 29 & 25.8 \\
Men & 23.1 & 18.3 & 18.1 & 18.7 & 16.7 & 14.4 \\
Women & 49.9 & 45.3 & 41.5 & 48.3 & 41.2 & 37.9 \\
\hline
\end{tabular}
\caption{Illiteracy Rates in Population 15 Years of Age and Older According to Geographic Area and Gender (1992-2001) (in percentages)}
\end{table}

The table illustrates why most governmental and nongovernmental institutions, including the Ministry of Education and international institutions like the World Bank, felt that the gradual implementation of the reforms were working. Yet criticisms began to surface about its effectiveness of creating real social progress and change. The first was on the idea of \textit{interculturality}. In 2007, a report by Pablo Regalsky and Nina Laurie looked at the deep

\textsuperscript{143} Contreras and Simoni, 20.
structures of the hidden curriculum in the indigenous education of Bolivia. While cultural traditions were recognized there were still issues raised in the indigenous community that provoked tension. A large portion came from the fact that community schools had lost their jurisdiction or control of over what and how it was taught. They concluded that the hidden curriculum continued to reproduce hierarchies that did nothing to recognize or value peasant or campesino communities’ work and knowledge, but continue to portray them as backward.\textsuperscript{144}

A more in-depth look at the changes the 1994 education reforms created within the Bolivian education system were analyzed in the ethnographic report by Julie Reid in 2007. There were various issues about the education law and its claim of fostering democracy and social equality particularly in regard to the most important aspect of the reform, which was on the representation of cultural diversity and indigenousness. While many educators were critical of certain areas of the reform, a majority spoke in support of the reform’s multicultural objectives about respecting and valuing all cultures. In the study, Reid uses the example of the bilingual textbooks that were created. Prior books had been representations of non-indigenous, very European-like characters.

Now, textbooks included characters of various indigenous identities to recognize the multitude of identities that existed in the pluri-national state. One of the issues was the potential of creating stereotypes through these illustrations which would reinstate and create static notions of identity that could be binding instead of liberating. The next issue was pictures of urban life versus rural life. Both pictures portrayed the different living styles of children in each setting, and each seemed very happy and joyful. Everyone was happy in each setting, even the animals. What is missing is the issue of the economic conditions and hardships of each scenario, particularly in the rural region. People living in rural areas were often forced to go to the city to

\textsuperscript{144} Regalsky and Laurie, 248.
look for work because they needed to help support their families. Then, there is a missing component in addressing issues of social justice through critical pedagogical practices. Critical learning was supposed to be incorporated into the curriculum, yet it seemed to be missing in the bilingual textbooks that were created. Again, this was an example of how a real opportunity to understand the reality of different cultures was prevented. It was more of a mere recognition of different lifestyles but not a better understanding of them.

Girls were also to be represented more in the bilingual textbooks and curriculum, but there were issues raised by Reid here as well. In one example, a children’s storybook that was created by the Ministry of Education chronicled the life of a young, poor, rural, indigenous girl named Maria. Maria was able to further her education through her friendship with another girl in the city, and she was able to become a teacher. Maria then returned to her community to teach in the village to share the knowledge she had gained, and become a role model for girls in similar situations\textsuperscript{145}. An encouraging story for girls perhaps, but was interesting was that this obligation to return to their communities was only required in the lessons taught to indigenous groups’ not non-indigenous groups living in urban area. The non-indigenous groups living in the urban areas could move wherever they wanted after their education, including studying abroad. There was no pressure on them to preserve their culture as among the indigenous students. In fact, preservation was strongly emphasized, as Maria from the story had settled in her village with her husband and had children. The goal of preserving one’s culture also meant preventing any “intermixing” because then its authentic identity was jeopardized. This was a direct contradiction of the reform’s philosophy of interculturality which emphasized interaction and sharing between culture rather than just co-existence. Then, there is the issue of freedom when comparing the obligations of indigenous students versus non-indigenous students which makes

\textsuperscript{145} Reid, 97.
one’s identity binding instead of liberating and not addressing the inequalities in terms of opportunities.

There is also an argument against neoliberalism as women are incorporated into the market for economic purposes. Then, I also revert back to the story of Maria, where responsibility of leaving then returning to help her own community was a choice solely placed on the character. Social and economic barriers are identified as self-created barriers that individual students must overcome. The responsibility in improving the situation in the village is placed on the people, and takes away responsibility from the government. It does not take into account the poor wages that are paid to teachers in rural schools, who often take second jobs to support themselves. It does not take into account the poor condition of the schools and the need to create multi-grade classrooms146. Again, it is a story creating simplified situations that do not address the realities and hardships that both indigenous girls and teachers face.

**Bono Juancito Pinto and the New Education Reform Law of Bolivia**

After Evo Morales was elected president in 2005, he set to correct the social inequalities and marginalization of the indigenous population that had not been truly addressed by previous governments. He also vowed to increase the participation of women in government and policy making because they were important contributors to the potential for social progress and transformation. Morales set forth to create a new programs and eventually a new education law that would transform the education system where critical pedagogical practices would be emphasized.

Before the law could be created and passed, a conditional cash transfer program was created to address gaps in education enrollment at the primary level. The *Bono Juancito Pinto*

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program was implemented in 2006 for primary school students. The cash stipend of two hundred bolivianos (the equivalent of approximately twenty eight US dollars) was provided per student attending grades 1st through 5th each year. The program expanded within the following two years to cover 6th grade through 8th grade as well as students in special education programs or alternative youth education programs. The incentive is provided to the mother, father, tutor, or guardian of the student with the expectation that it will help students stay enrolled in school. The outcome is for enrollment levels to increase and income inequality to be reduced. It is particularly targeted at addressing major gaps for girls and indigenous and rural students where opportunity costs are higher. Although education is free there is a cost in sending them to school, often due to school supplies, textbooks, and uniforms. There is also an opportunity cost in not having the extra help at home or on the farm.

Figure 3. BJP Beneficiaries
(thousands of people as percentage of total population)


The continued expansion of the program (See Figure 3)\textsuperscript{150} has been very successful. According to the Yáñez, Rojas, and Silva study, Bolivia has achieved universal access to education for children up to the age of 11 with gender parity in literacy and enrollment rates. However, dropout rates are still highest at the secondary level with a continued significant gap in terms of gender, ethnicity, and location. The gaps at the secondary level continued to be addressed, but the primary achievement has been beneficial in meeting the MDGs of 2015. While poverty reduction has not been significant, it has helped lower levels of extreme poverty and decreased income inequality by one percent\textsuperscript{151}.

The \textit{Bono Juancito Pinto} program is funded by the royalties gained by the Direct Tax on Hydrocarbons and the mining sector, and allows for more than 1.5 million students to benefit\textsuperscript{152}. The overall improvement in indicators have been great, but Morales had campaigned with the Movement Towards Socialism (MAS) party’s political message focused on the idea of “decolonizing the state” and integrating indigenous cultural knowledge into government policies. The newly proposed education bill, which is called \textit{Ante Proyecto: Nueva Ley de Education “Avelino Siñani y Elizardo Pérez”} (ASEP) embodies the idea of “decolonization of education” through the use of “intra-cultural education”. The law states that education is to be free, obligatory, unitary, and secular. Therefore, private education should be dismantled, class-based

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\textsuperscript{150} Figured obtained from Yáñez, Rojas, and Silva’s study in the \textit{Focal Policy Brief} (May 2011): 2.

\textsuperscript{151} Yáñez, Rojas, and Silva, 4.

\textsuperscript{152} “The Juancito Pinto Bono, a grant to stop absenteeism”, Theprisma Multicultural Newspaper (November 14, 2011), accessed May 18, 2012. \url{http://www.theprisma.co.uk/2011/11/14/the-juancito-pinto-bono-a-grant-to-stop-absenteeism/}.
differentiation between rural and urban education would be abolished, and religious education in schools would be dispensed\textsuperscript{153}.

The plan seeks to get rid of any Western ideas, and its hierarchical systems including those based on class, race, and gender. While the law had been passed by the Education Congress in July 2006, the decision to create a new constitution led for the postponed approval of the new ASEP Law until December 2010\textsuperscript{154}. After the law passed, the plan was to implement it gradually to ensure it is implemented properly unlike the initial attempt to implement the 1994 on a massive scale\textsuperscript{155}. The research project by Mieke T.A. Lopes Cardozo creates a detailed analysis of the distinct changes between the 1994 reform and the new education reform. There is an important pedagogical distinction as the new law is more influenced by Paulo Freire’s theory on critical reflection and learning than on the constructivist model of the older reform (see Table 9)\textsuperscript{156}.

\begin{itemize}
  \item \textsuperscript{154} Howard, 591.
  \item \textsuperscript{155} Senneseth, 29.
  \item \textsuperscript{156} Lopes Cardozo, 113.
\end{itemize}
<table>
<thead>
<tr>
<th>Models of Teacher Education</th>
<th>1994 Education Reform and Teacher Education Policies</th>
<th>2006-2010 ASEP Reform and Teacher Education Policies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td>1992-2010</td>
<td>In Development since 2006, approved as law December 2010</td>
</tr>
<tr>
<td>Ideal</td>
<td>Intercultural and Bilingual Education (IBE)</td>
<td>1) Decolonised, 2) Inter/intracultural/plurilingual, 3) Productivity and 4) Communitarian education</td>
</tr>
<tr>
<td>Representative School</td>
<td>Warisata</td>
<td></td>
</tr>
<tr>
<td>Pedagogical Influence/ Learning Theory</td>
<td>Constructivism, Vigotsky</td>
<td>Freire, Action Research, coloniality theories of knowledge</td>
</tr>
<tr>
<td>School and Classroom Teaching Technologies and Methods</td>
<td>Child-centered, participatory, core and addition curriculum</td>
<td>Community involvement, productive education, core &amp; additional curriculum, problem-based learning</td>
</tr>
</tbody>
</table>

There is constructivist influence in Paulo Freire’s critical pedagogy. Some of the influences of constructivism as a learning theory include the education philosophy of John Dewey. The shift in pedagogical methods comes in the area of content. Teachers are trained to use a socio-historical approach to understanding postcolonial issues. The community is given importance, not just the individual. It is part of the four pillars that have shaped the ASEP reform and its teacher education policies which are listed under the ‘Ideal’ in Table 9. This new ideal requires teachers to be trained in a manner that allows them to facilitate reflection and critical thinking. The teacher education policy has been modified to create a 5 year training program that will equip teachers with the skills to teach within the ideals of social justice education. The extension of the training program is contrary to the global tendencies to shorten teacher training. The table also illustrates the effort to limit funding and influence by outside international institutions. Common lenders such as the World Bank, the IMF, and UNICEF were removed in the new reform for financing the project.

The law is quite new, and still has to be fully implemented into the education system prevents a full-detailed analysis of its effectiveness. This, however, has not stopped the ongoing debate regarding the new education law. The criticisms have come from all sides in the state, including the far left. The first, probably more obvious comes from the church. Private, religious education is common in most countries, and the fact that private schools and religion are expected to be taken out of the equation has the Catholic Church very uneasy. Catholicism is the identified religion of more than half the Bolivian population. The Catholic Church sides with others (often upper-class families with children in private schools) that believe the right to

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157 Lopes Cardozo, 108.
choose the type of education children receive is being taken away from them. Their defense is that they no longer have a choice, and choice is an important concept of freedom\textsuperscript{158}.

Many critics on this side of the debate feel that it is an attempt to indoctrinate and impose the views of Evo Morales. The law also received heavy criticism from the far left, particularly the Trotskyite left that dominates the Urban Teachers’ Union\textsuperscript{159}. The proposal is thought to have many left-wing phrases that emphasize making the education system more liberating with its anti-imperialist, anti-Western, anti-patriarchy jargon but the actual process does not change what has already been attempted and done. There are even debates and confusion about the terminology. The use of “indigenous people” is seen by the far left as a continued use of terminology that was created by the colonizers\textsuperscript{160}. They are quick to then point out the fact that it seems to mirror much of the same objectives of the reform project of 1994. For this group, the only exception is the plan to get rid of privatized schools and religious content. They are quick to recall that the 1994 law had also stated it would use critical pedagogical practices but it was never really implemented. The Morales administration stands by its policy, and identifies the goal of having students understand the social-historical aspects that have led to present systems of inequality as it is a necessary component for social transformation to occur.

Helen Strom wrote her observations in the Fall 2011 \textit{ReVista, a Harvard Review of Latin America} about the differing concerns among the indigenous groups. Strom had attended an indigenous march held by the CIDO (Confederation of Indigenous Peoples of the Bolivian Oriente) to demand modifications to the new law. Strom had hoped to understand why not all

\textsuperscript{158} Senneseth, 50.

\textsuperscript{159} Howard, 590.

\textsuperscript{160} Senneseth, 48.
indigenous groups were in support of the new law regarding education. A common theme seemed to be concern about the autonomy the community would have in implementing the education strategy\textsuperscript{161}. Grassroots movements had held an important voice in creating social change in Bolivia, and their participation should continue into the field of education. They wanted to make sure the needs and concerns of a specific community could be taken into account. Other groups, like the Guayara, felt that the move was too radical and needed to be adjusted. As a primarily Catholic indigenous group, the issues of religion were also of concern. These critics fail to recognize that the law is abolishing state funding for Catholic and private schools. It is not outlawing the existence of the schools; it is only attempting to create a strong separation between church and state.

Teachers and women involved in the reforms of 1994 had concerns about changing the law because they felt the previous reforms were making progress. Also, while anti-patriarchy was mentioned in the law, the actual focus on gender was not clearly outlined. However, as Robin Goodman’s book \textit{World, Class, Women: Global Literature, Education, and Feminism} points out, critical pedagogy and the feminist legacy are very much intertwined. Critical pedagogy is an important tool in helping understand the gender inequality that exists in society\textsuperscript{162}. Evo Morales has campaigned on promises of equality, including gender. The administration of Evo Morales has been the most gender inclusive and diverse in Bolivia’s


The higher representation of women in government could benefit how policies toward improving not only education but other gender-related issues are created and implemented.

**Overview of Bolivia’s Economic and Social Indicators**

As specified in the previous chapter, the most current economic and social indicators will be important for the final comparative analysis. Bolivia’s nationalization of important resources, mainly the hydrocarbon sector, has created an economic surplus for government to use towards improving social services such as health and education. The economic growth will be a crucial factor for the implementation of the new constitution and new laws, including the new ASEP education law. The literacy rates breakdown by gender and area was illustrated in the earlier section to demonstrate the reasons as to why the 1994 education reform was seen as a success. The literacy rates have continued to increase under the Morales administration, and the administration declared the state had achieved gender parity at the primary level with the *Bono Juancito Pinto* program.

<table>
<thead>
<tr>
<th>Table 10. Selected Economic Indicators for Bolivia</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP – Real Growth Rate</td>
</tr>
<tr>
<td>Unemployment Rate</td>
</tr>
<tr>
<td>Population below poverty line</td>
</tr>
<tr>
<td>Distribution of family income - Gini Index</td>
</tr>
<tr>
<td>Budget:</td>
</tr>
<tr>
<td>Revenues</td>
</tr>
<tr>
<td>Expenditures</td>
</tr>
<tr>
<td>Public debt</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Table 11. Selected Social Indicators for Bolivia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population growth rate</td>
</tr>
<tr>
<td>Maternal mortality rate:</td>
</tr>
<tr>
<td>Infant mortality rate:</td>
</tr>
<tr>
<td>Life expectancy at birth (total population):</td>
</tr>
</tbody>
</table>

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163 Morales, 588.
The tables limit the analysis that can be made because the information provided by the CIA World Factbook is limited or dated. The information gathered by the CIA website is limited due to the present volatile relationship between the United States and the Morales administration. The 2011 estimates still show positive indicators in terms of economic growth but an in-depth analysis based on data for social indicators could not be assessed. However, the World Bank Database had some interesting social indicators to assess.

### Table 12: Bolivia Social Indicators

<table>
<thead>
<tr>
<th>POPULATION</th>
<th>1999-2001</th>
<th>2002-2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population, mid year (millions)</td>
<td>9.2</td>
<td>9.7</td>
</tr>
<tr>
<td>Growth rate</td>
<td>2.0</td>
<td>1.9</td>
</tr>
<tr>
<td>Poverty (% of population)</td>
<td>62.7</td>
<td>65</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SOCIAL INDICATORS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Expenditures</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health (% of GDP)</td>
<td>4.3</td>
<td>6.4</td>
</tr>
<tr>
<td>Education (% of GDP)</td>
<td>6.4</td>
<td>18.1</td>
</tr>
<tr>
<td><strong>Net primary school enrollment</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total (% of age group)</td>
<td>95</td>
<td>108</td>
</tr>
<tr>
<td>Male</td>
<td>95</td>
<td>108</td>
</tr>
<tr>
<td>Female</td>
<td>96</td>
<td>108</td>
</tr>
<tr>
<td><strong>Access to improved water</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total % of population</td>
<td>85</td>
<td>86</td>
</tr>
<tr>
<td><strong>Immunization Rate</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(% of children 12-23 months)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2006</td>
<td>2009</td>
</tr>
<tr>
<td>------------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td><strong>Measles</strong></td>
<td>64</td>
<td>81</td>
</tr>
<tr>
<td><strong>Life Expectancy</strong></td>
<td>65</td>
<td>66</td>
</tr>
<tr>
<td><strong>Infant Mortality</strong></td>
<td>54</td>
<td>46</td>
</tr>
</tbody>
</table>

*Source: World Bank Development Indicators Database, 2006 and 2009*

Table 12 illustrates the great gains that have been made as of 2008. Investment in education has tripled since the 1990s. This has created a drastic increase in enrollment levels at the elementary level. Poverty and expectancy have improved at a smaller rate, but like Guatemala has seen improvements. The New Education Law is supposed to help address the rate of improvement in quality of life. There are definite legitimate concerns about the effect that the New Education Law of Bolivia will have on the education system and development in general, but many of the objectives seem to address what the Education Reform Law of 1994 was lacking. The focus on critical pedagogy in classroom instruction will be an important method at understanding and addressing the issues of poverty and inequality in the state. Perhaps the notion of *interculturality* will finally be obtained. The type of education received is just as important if issues of gender inequality are to be understood and addressed. Critical literacy and education pedagogy is an important step in reaching that level. If critical pedagogical methods are incorporated into the classrooms of Bolivia, then it may lead for feminist action regarding gender issues in the future. It is an important first step. The development strategies focused on females prior to the ASEP law did not address this.

The education system is a political space, and the type of policies and how they are implemented are important. Therefore, there are also legitimate concerns by indigenous groups in their role and control of such social structures. The needs of the indigenous population need to be taken into account. There have been instances where indigenous communities have taken over abandoned schools, and been successful at maintaining the school and its academics with an
emphasis on valuing the contributions of their indigenous culture. Therefore, the way that education policies are created and implemented should remain bottom-up not top-down. It is how Evo Morales and the MAS party initially rose to power after all.
Chapter Five
Comparative Analysis, Limitations, and Conclusion

Historical Comparative Analysis

The historical background in both Guatemala and Bolivia demonstrate how intertwined the political, economic, and social spheres are. Each sphere has a significant impact on the other. Guatemala and Bolivia both have gone through constant regime changes in their post-colonial history. The shifts from democratic to military rule had significant impacts on public policies pursued, including the area of education. The economic gains or setbacks also influenced the direction that each government took. The social sphere assisted in creating political shifts, and has been influential in its reaction to economic changes by mobilizing and establishing strong social movements that drew attention to societal issues within each country.

Literacy and education had been a political goal for both countries after independence, as it was deemed necessary if the government was to successfully function politically and economically. Primary education was made compulsory, but was never carried out or meant to include everyone. The hierarchies that were established during the colonial period remained in place, and those at the top maintained higher accessibility to higher levels of education. Access to basic education remained extremely limited for the indigenous populations in both countries. It would lead to high illiteracy rates that particularly affected indigenous populations living in rural areas. Literacy tests were required to vote which prevented indigenous participation in government. While democratic governments were more likely to create schools, militaristic regime changes limited or eradicated any progress made in improving access to education.

Military rule had a particularly negative impact on Guatemala’s education system. The thirty-six year long civil war left the education system in ruins, while Bolivia slowly recovered from the shutdown of Warisata-modeled schools that were created in the 1930s.
Outside influence played an important role in the direction each country took as well. The entrance into the global market economy meant outside economic interests were at stake, and the government was an important player in maintaining those interests. Intervention by the United States had significant impact in both Guatemala and Bolivia. However, the CIA assisted military-coup that removed Jacobo Arbenz Guzman from power in the 1950s had a longer lasting negative impact on Guatemala. U.S. influence in Bolivia was not as extreme due to the government’s susceptibility to accepting of any economic conditionalities tied to U.S. aid.

The debt crisis in Latin America in the 1980s increased outside influence as World Bank and IMF policies were implemented through SAPs that both Guatemala and Bolivia accepted. The SAPs prescribed cutting important public funding in the areas of health and education. The economic crisis and following prescriptions had a detrimental impact on the poor. A population that was usually concentrated in rural, indigenous regions. Social movements were mobilized to bring attention to the dire situation of the poor, and the social unrest in Latin America created a shift in international economic strategies. Indigenous grassroots movements in Bolivia were particularly effective in limiting the implementation of neoliberal reforms. The success of social movements in Bolivia was due to the fact that the government was less militarily repressive compared to Bolivia. Another setback for Guatemala was the indigenous fractions that prevented diverse groups from coming together and creating a cohesive social movement.

Gender, Education, and Development

Poverty became an important international issue during the 1990s, and education was identified as an important strategy to address the problem. International institutions such as

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164 The increase in privatization of companies during the 1990s led to growing social discontent with the ruling MNR party and helped bring the MAS party to power. The success of the 2000 “Water War” in Cochabamba Valley that prevented the privatization of water was an important turning point for indigenous movements (Chapter 9 of Herbert Klein’s *A Concise History of Bolivia, 2nd Edition*, 2011).
UNESCO created policies such as “Education for All”. Gender became a highlighted issue as females had lower levels of literacy and education. In Bolivia and Guatemala, the lack of access to schools by indigenous communities and the high level of gender disparity led to an emphasis on increasing literacy and education for indigenous girls and women.

The World Bank and IMF provided lending and created programs to achieve the international initiatives towards improving literacy and education for all. The human capital theory and argument by economists such as Amartya Sen and Larry Summers created the necessary justification for economic aid and involvement. The impact of the SAPs of the 1980s had created a negative and suspicious image of the World Bank and IMF particularly among indigenous populations. In order to change this image, new programs were created during the 1990s that claimed to be more inclusive and socially aware in addressing the societal needs of each country. The main strategy was to create more schools in rural regions so indigenous communities had access. For Guatemala, the World Bank provided lending for various education projects but the biggest project implementation was PRONADE. In Bolivia, the World Bank (among other international institutions) assisted in the financing and policy counseling for the implementation of the 1994 Education Reform law under President Sanchez de Lozada.

Both Bolivia and Guatemala are reported to have made gains in addressing gender disparities and accessibility to education. However, Bolivia has made greater gains when compared to Guatemala. The 1994 Education Reform act to help increase the number of schools accessible to rural indigenous communications yet both countries struggled with these purported inclusive, multicultural policies. The top-down approach limited the voice and influence of the indigenous population on policies implemented. The PRONADE program created their own
policy ideas that were modeled after community schools like the Maya schools, but did not take the recommendations provided by those they were modeled after. The designs were created by technocrats working within the World Bank not by the communities. Bolivia had similar problems. Materials within the reformed curriculum did not represent the realities of indigenous communities. The content did not create the notion of *interculturality* because there was only attempts to create recognition not improve understanding of different lifestyles and cultures.165

During this period, indigenous communities in Bolivia continued to be more politically active in drawing attention to their issues. They gained more control over the policies that the government pursued through grassroots mobilization. The political activism of the indigenous populations led to the election of Bolivia’s first indigenous president, Evo Morales, in 2005. This brought indigenous issues to the forefront in government. The Morales administration has made new policies and laws to address the issues of inequality that have long been embedded in Bolivia’s history. The new Constitution and its laws also include an effort to address gender inequalities in not only education but society as a whole. The higher representation of women in the Bolivian government is one strategy expected to continue to identify and address gender-related issues.

The ASEP education law of Bolivia is a significant shift in the strategies implemented in the 1990s. An interesting aspect of the new law and its policies is that it will be financed outside the sphere of influence of the World Bank and other important international institutions. Meanwhile, education initiatives in Guatemala continue to rely on lending from the World Bank. The latest projects implemented in Guatemala were in 2001 for primary education and in 2007 for secondary education. Bolivia also received a loan in 2007 for a project targeting access to

secondary education but the amount is much less significant. The 2007 World Bank loan for Guatemala was eight times larger than the loan Bolivia obtained (See Table 13)\(^\text{166}\). The ASEP plans for financing will still depend on foreign aid but it will come from unconditional funds from countries other than the United States\(^\text{167}\). The overall project totals towards education reform are also higher for Guatemala, and the country continues to struggle in achieving gender parity at the primary level.

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Project</th>
<th>Loan Amount</th>
<th>Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guatemala</td>
<td>2007</td>
<td>Education Quality and Secondary Education Project</td>
<td>$80 million</td>
<td>Grace Period=6 years Maturity Period=16 years</td>
</tr>
<tr>
<td>Guatemala</td>
<td>2001</td>
<td>Universalization of Basic Education Project</td>
<td>$62.16 million</td>
<td>Grace Period=4.5 years Maturity=17 years</td>
</tr>
<tr>
<td>Guatemala</td>
<td>1997</td>
<td>Basic Education Reform Project</td>
<td>$33 million</td>
<td>not provided</td>
</tr>
<tr>
<td>Bolivia</td>
<td>1994</td>
<td>The Education Reform Project</td>
<td>$28.8 million</td>
<td>not provided</td>
</tr>
<tr>
<td>Bolivia</td>
<td>1998</td>
<td>Education Quality and Equity Strengthening Project</td>
<td>$75 million</td>
<td>not provided</td>
</tr>
<tr>
<td>Bolivia</td>
<td>2007</td>
<td>BO Secondary Education Transformation</td>
<td>$10 Million</td>
<td>Grace Period = 5 years</td>
</tr>
</tbody>
</table>


A February 2011 report by Isabel Ingualzo demonstrates the difference in emphasis on the importance of education. For Bolivian deputies there is a 60.7% importance given to addressing problems in education compared to Guatemalan deputies’ 46.3% importance on education\(^\text{168}\). Citizens in both countries view education as an important issue, but there is a higher emphasis on addressing it in Bolivia. The report also provided some interesting insight into the funding in education based on departments. In Bolivia, departments that are predominantly non-indigenous dedicate a larger share of funding to education while the opposite


\(^{167}\) See Table 9 in Chapter 4

occurs in Guatemala. The increase in budget allocation in Bolivia for predominantly non-indigenous departments is 35.7% of their budget compared to 28.3% for predominantly indigenous departments. In Guatemala, predominantly non-indigenous departments allocate 29.7% of their budget to education while predominantly indigenous departments use 36.4% of their budget for education[^169]. One might conclude the higher allocation for non-indigenous departments in Bolivia might be linked to the current criticisms and fears regarding the implementation of the new education law. For Guatemala, it could be that indigenous departments recognize the needs of their community to allocate more money to its schools. A case can be made for this when comparing overall education expenditures. Guatemala’s education expenditures are 3.2% of GDP compared to Bolivia’s 6.3%[^170]. Bolivia is investing close to double the GDP than Guatemala. Therefore, there is more money in government to invest. Guatemala’s larger investment in indigenous departments is likely due the need because of limited monetary resources. In Bolivia, the use of cash incentives through the Bono Juancito Pinto program could also be a reason for a decreased investment in education for departments that are predominantly indigenous. The numbers in this report are then misleading, but show that indigenous communities in Guatemala are attempting to address problems in education.

The governments of both Bolivia and Guatemala have maintained their commitment to meeting the EFA goals and MDGs created in 1990 and 2000. The shift in Bolivia’s political, social, and economic strategies has been very recent. Guatemala’s civil war that ended with the 1996 Peace Accords also left Guatemala at the starting line in terms of access to education. These are some of the limitations to be identified in the following section. However, the massive scale of education reforms that focused on improving and addressing gender disparities in

[^169]: Inguanzo, 6-8.

[^170]: See Tables 6 and 11 in Chapters 3 and 4.
literacy and education still need to be analyzed. There are some important gains and setbacks in terms of access and development that need to be identified for the conclusion to this project. The Human Development Report was created in 1990 to monitor, research, and report the progress being made in addressing the internationally identified problems of poverty, health, education, inequality, and gender disparities. Both Bolivia and Guatemala have maintained a medium level of human development. The most recent 2011 UNDP Human Development Report provides important insights for this comparison (See Figure 4, Figure 5).\textsuperscript{171}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure4.png}
\caption{2011 HDI Indicators Comparison}
\end{figure}

\textsuperscript{171} Figures 4 and 5 and Table 13 were created using statistics from the UNDP 2011 Human Development Report, accessed May 30, 2012, \url{http://hdr.undp.org/en/data/profiles/}
The terms of gender inequality indicators are significant in the argument for female literacy and education (See Table 14). The Gender Inequality Index (GII) reflects women's disadvantage level in each country. The UNDP Human Development Report currently has three dimensions and five indicators used to measure the inequality comparing all country using data of reasonable quality allow. The five indicators are maternal mortality, adolescent fertility, parliamentary representation, educational attainment (secondary level and above), and labor force participation. The first two indicators fall under the dimension of Reproductive Health,
parliamentary representation and higher levels of education fall under the dimension of Empowerment, and the last indicator of labor participation falls under the dimension of the labor market\textsuperscript{172}. The Gender Inequality Index is designed to reveal the extent to which the achievements of each country are eroded by gender inequality, and to provide empirical foundations for policy analysis and advocacy efforts. The GII trends demonstrate the Bolivia’s Index of .788382 in 1995 has gone down to .476353 in 2011, while Guatemala’s index has only moved down from .567738 in 1995 to .541824 in 2011\textsuperscript{173}. Therefore, Bolivia has continued to improve at a higher level than Guatemala in terms of addressing gender inequality. The ASEP law focusing on empowerment can be a future positive gain under the umbrella of empowerment.

The Gini coefficient is also an interesting and important component to the concluding argument of this project. The index provides an insight into the income inequality that exists within each country. The higher the number signifies a higher level of inequality. The indicators from the case study tables in previous chapters had Bolivia with a Gini Index of 58.2 (2009) while Guatemala had a Gini Index of 55.1 (2007)\textsuperscript{174}. The 2011 UNDP Human Development Report has demonstrated a decrease for both countries with Bolivia at 57.3 and Guatemala at 53.7\textsuperscript{175}. As mentioned in Chapter four, the Bono Juancito Pinto program has helped decrease inequality in Bolivia. In Guatemala, the indigenous population continues to be marginalized but have been more politically active since the Peace Accords. In the 2003 election, the indigenous


\textsuperscript{174} CIA World Factbook Indicators (See Tables 5 and 10 in Chapters 3 and 4).

\textsuperscript{175} UNDP, “2011 Human Development Report”.

turnout was 3 percent higher in predominantly indigenous departments than in Ladino departments. There is still much to be done to address the rights of Guatemala’s indigenous population but they still were able to maintain a slightly lower level of income inequality than Bolivia in this most recent report.

In comparing Bolivia and Guatemala to Amartya Sen’s research on Kerala, the HDR reports create different outcomes than expected. Not all claims coincide when comparing female literacy and education levels to certain social indicators related to human development. Guatemala has better health indicators and higher life expectancy despite lower levels of female literacy and education. Guatemala’s life expectancy is at 71.17 while Bolivia’s is 67.9. Maternal mortality rates are also lower in Guatemala. What does coincide with Kerala is the correlation between the higher level of female education and its lower female fertility rates, higher female labor force participation, and women’s political activism.

The discrepancies do not take away from the importance of Sen’s work. Female literacy and education are still important factors for creating strong democracies in each country. The state of Kerala women act as important social agents towards progress and change. The high level of female participation in civil society has been successful in making sure societal needs within their communities are met. Sen’s research demonstrated the significant contributions women could make to the overall quality of life within a country. Women’s agency is then necessary to address gender inequalities that exist in society but there is a historical background to creating that agency. In Sen’s work he did point out the fortunate historical past that could make Kerala’s experience more difficult to emulate. Kerala’s strong social movements had

176 Booth, Wade, and Walker, 156.

177 See Tables 6 and 11
helped educational advancement along with the emancipation of lower castes\textsuperscript{178}. This means that hierarchical structures within Kerala’s society changed allowing for the researched gains to be made. Bolivia and Guatemala’s hierarchal systems remained unchanged after independence. Bolivia’s new constitution and new laws are an attempt to dismantle that system which is believed to be the main reason poverty and inequality has continued.

**Limitations and Conclusion**

Female literacy as a development strategy can have significant gains on societies in developing countries but the methods and focus are important to the success of these strategies. Historical hierarchies and patriarchal norms are all issues that need to be addressed if countries are ever to gain gender equality. Education can be an important contributor to creating such a change. The case studies demonstrated how politics influence the types of policies pursued in areas such as education. Education is not apolitical, as has been explained by critical theorists.

It brings to mind the work of Aurora Levins Morales regarding the importance of ‘controlling the story’. In “The Historian as Curandera”, Morales explains the importance of history in explaining our present. The way history is told shapes the contemporary needs in society. During colonialism, the history of the indigenous peoples needed to be replaced by a new story that explained the new imbalances of power. The restructuring had to seem natural, inevitable, and permanent to create a legitimacy of the new power structures. History is then a form of storytelling. Storytelling is not neutral as it is controlled by those in positions of power. Women can change the history by finding their own voice and identity to tell their own stories. Stories can include the untold or undertold histories of not only women but children, workers, the poor, etc. The article uses a ‘curandera’s handbook’ to motivate women, particularly

\textsuperscript{178} Dreze and Sen, 200.
indigenous women, to change the current landscape by showing agency and revealing hidden power relationships to expose the inequality that exists within the present system.\textsuperscript{179}

The new ASEP law in Bolivia could be an attempt to change the story. The new ASEP law brings indigenous issues to the forefront and is attempting to dismantle the hierarchal systems to create a more equitable society. The focus on increasing gender parity not only at the primary levels, but secondary levels as well, may continue to address gender inequalities. The current female representation in government can also be beneficial in terms of access to education and other gender-related issues. There are several limitations to my analysis. The recent passing and implementations of the law make it impossible to assess consequences. The newness of the law prevents any significant outcomes on poverty, equality, and human development to be determined or analyzed.

Uncertainty about the direction that each country will continue to take in the future is also a limitation. Both countries have a strong history of creating constant and even radical political changes in government. Just as indigenous mobilization brought the MAS party to power, the non-indigenous business elite may attempt to reassert their control of government. However, it is unlikely that US intervention will occur as it did in Guatemala in the 1950s. For Bolivia, US relations will be impacted politically and more importantly economically. Investment and aid continue to be impacted by Bolivia’s economic and political policies which have created diplomatic and economic tensions not only with the US but the World Bank as well. This may or may not affect the sustainability of leftist policies.

The positive outlook in terms of economic sustainability for Bolivia’s policy implementation is the nationalization of important natural resources that are more resistant to

economic downturns. This will provide a cushion for any economic impact caused by political policies. Guatemala does not have the type of natural resources that Bolivia has. Therefore, a similar movement and government shift in Guatemala is not likely to be established or maintained outside influential international institutions such as the World Bank which have been historically led by US leaders. Guatemala has continued to faithfully implement education policies lauded by the World Bank. The consequence of this fidelity is a fragmentation of educational provision because lack of control by the state and overemphasis on delegating responsibilities to unprepared indigenous communities. The continued political activism of indigenous communities may help address inequalities in education and problems of implementation and control. Again, more time is needed to see how policies evolve.

The influence of NGOs is also not analyzed to see how the influence or impact education policies and practices. The focus was on the education policies and programs of the state and major international institutions (mainly the World Bank). Chapter two had mentioned the feminization of NGOs as it created a sphere in which women could participate and address gender inequalities. The programs focused on popular education and women’s empowerment. The outcomes and influences of these programs on policies at the local, national, and international level were not addressed. There was also a debate on whether or not these programs where creating social change or maintaining justification for continued neoliberal policies. The debate and vast amount of programs seemed too considerable to analyze within this thesis project.

While international influence on Bolivia’s policies may be limited, Guatemala will likely still rely on funding to meet international goals of EFA and MDGs. However, strategies at the international level whether non-profit, intergovernmental, or nongovernmental also need to
change if they are expected to continue to meet the development goals of 2015. The human capital theory used by the World Bank had focused too much on incorporating women into the labor market as a method of addressing poverty. Incorporation into the labor market meant an increase in income through wages. However, as the HDI report demonstrates, when it comes to gender inequality labor force participation is only one indicator. The empowerment indicator maintains two important indicators – higher education and political representation.

These are areas where real and important development changes can occur. Empowerment is viewed by critical theorists as a crucial tool in achieving equality and a just society. Content as described under Bolivia’s new law helps students understand the historically derived problems of today. Only in understanding the reasons and histories behind the problems can real solutions be created. More importantly, the integration of gender perspectives is necessary to attain gender equality in an all-inclusive learning and social system. Gender equality in education aims to transform gender relations to establish more equitable societies.\(^{181}\) Women then are a crucial component in creating effective policies. Then content of policies takes on a more important role than increasing access and numbers.

Even the most recent IEG report of the World Bank reported that content and quality had been crucial areas that were not addressed with prior education programs. The increase in accessibility was good for improving levels but no real development gains had been made because content and quality was poor.\(^{182}\) There is also a newly identified focus on secondary education as it continues to be a problem for both Guatemala and Bolivia. Bolivia has gained gender parity at the primary level but it continues to struggle with maintaining those levels at the secondary level.

\(^{181}\) Diallo, Aicha Bah, “Introduction,” of “Gender equality in Basic Education in Latin America and The Caribbean (state of the art).” UNESCO Regional Offices of Education for Latin America and the Caribbean, Santiago, Chile (March 2002).

secondary level. Guatemala continues to struggle in both primary and secondary levels but expects to meet gender parity at the primary level by 2015. It will be necessary to revisit the gains in female literacy and education in 2015. While it is unlikely that all objectives of the EFA and MDGs will be achieved within the next three years, the outcomes and shifts in policies will continue to shape how poverty and gender equality are addressed. The certain outcome of this research is that the methods of the 1990s did not work in addressing either issues and drastic changes have to occur if gains are to be made. Table 15 provides an overall summary of whether or not Bolivia and Guatemala are making drastic changes to address and meet both EFA and MDGs.

<table>
<thead>
<tr>
<th>Government Policy Changes</th>
<th>Guatemala</th>
<th>Bolivia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refoundational Constitution</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>New Critical Literacy Education Program</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Including gender issue in education policies</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Met the Gender Parity at the Primary Level Goal</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The summary of Table 15 demonstrates that Bolivia has made significant changes surrounding gender inequality and inequality overall. The purpose of this research was to argue that critical methods are required if real changes in society are to occur. There was insufficient data to use in terms of outcomes for Bolivia’s education policies. While the argument for critical literacy could not be proven, current indicators and statistics demonstrate that there is potential for a stronger argument in the future, especially when comparing recent gains in Bolivia compared to Guatemala. The future outcomes within an established curriculum that emphasizes on critical literacy and methods will determine the strength of the argument. This research,
however, should serve as a “build-on it” type discourse in terms of education and education policy.
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