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The spread of targeted educational policies in Latin America:

Global thesis and local impacts*

1. Introduction

The process of globalisation generates significant economic, political, social and cultural changes that affect all corners of the globe, albeit in different ways and intensities and with different consequences. These changes are clearly reflected in the realm of education, and they generate multiple impacts on both educational supply and demand. The expansion of systems of educational assessment and standardisation on an international scale, the consolidation of new stakeholders capable of taking decisions and undertaking actions in the domain of education, and the emergence of new priorities and mandates for the sector are just a few of the current transformations that we could hardly begin to grasp without referring to the process of globalisation.

This article strives to analyse the characteristics and repercussions of what R. Dale called “the mandate of educational systems”, referring to what is regarded as desirable and legitimate for the educational system to fulfil (Dale, 1989). In particular, what we understand as the new educational mandate for Latin America will be examined, analysing its repercussions on the design and development of certain educational policies. In order to perform this analysis, it is crucial to bear in mind that the process of globalisation influences not only the content of this mandate but also the process through which it is created and consolidated. That is, in a context of globalisation not only are the priorities of educational policy changed or amended, rather at the same time there is an important transformation in both the stakeholders shaping these priorities and the scope and repercussion of them.

Traditionally, the guidelines and priorities of educational policy were primarily defined by the nation-state, as the main stakeholder in the regulation, provision and financing of education. In the context of globalisation, however, the stakeholders affecting the design and guidance of educational policies multiply, thus shaping numerous spaces and scales of decision-making on educational matters. In particular, we must highlight the influence wielded by international and supranational organizations such as the World Bank (WB), the World Trade Organisation (WTO) and the European Union (EU), which are gradually broadening their ability to influence the guidance and development of certain educational policies. Within this framework, it is no longer sufficient to focus on the national level to understand the mandate of educational policy; rather it is necessary to examine the interactions and relationships amongst different stakeholders and scales.

It should also be borne in mind that one of the characteristics of the process of globalisation is the increasing similarity of policies, priorities and ways of action on a global scale, thus generating a progressive convergence of action agendas in the northern and southern countries. The current mandate for Latin America thus forms part of what we understand as the new global educational agenda, one that defines the main educational challenges on a global scale in which the causes are pinpointed and policies to solve them are sought; an agenda agreed upon by national governments, international organizations and other nongovernmental agencies; an agenda that goes beyond individual cases and sets shared educational goals and priorities, regardless of the particular national contexts.

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When we speak about the construction of a new global educational agenda, thus, we are referring to the process through which educational decisions cease to be subject solely to the national scale, as they shift to being simultaneously defined by multiple processes and stakeholders. We are also talking about an action agenda that has consequences all over the globe, affecting – albeit in different ways and intensities – the policies and action priorities of all the countries and regions.

Finally, it is important to emphasize two elements, basic for understanding the agenda's specific meaning and way of acting. First, the global educational agenda doesn't imply global educational policies. With the establishment of a global agenda, international organizations have the possibility of guiding the international debate on educational policy, determining which topics are most relevant and considered a priority. At the same time, they can also elaborate recommendations for action to solve the identified problems. In this sense, the agenda is setting the rules of the game in which national educational policies will be made and applied. But this doesn't mean a direct imposition of these rules on the national context, nor the existence of common educational policies around the world. Globalisation doesn't make the nation-state obsolete. On the contrary, we can argue that the effects of the agenda are largely locally mediated. In this sense, and following R. Dale's proposal, we explicitly move away from the "World Institutional thesis" (represented by John Meyer, Francisco Ramírez, John Boli and other Stanford School academics)¹ and instead of defending a "Common World Educational Culture", we support the idea of a "Globally Structured Educational Agenda" (Dale, 2000). While Meyer (Meyer, 2000) views globalisation as an intensification of institutional emulation between states, a spread of supranational set of ideas, norms and values around the world and a convergence in universal values and common culture, in Roger Dale's proposal, globalisation is a set of political economic arrangements for the organization of the global economy, driven by the need to maintain the capitalist system rather than any set of values. It is in the latter conception of globalisation in which our analysis of the global educational agenda has to be understood and located.

Second, the global educational agenda is embedded into the dominant ideology of our time: neo-liberalism. Although it is important to differentiate the process of globalisation itself from the neo-liberal ideology (neo-liberalism can't be understood as an intrinsic characteristic of globalisation²), we can argue that the hegemonic kind of globalisation is the neo-liberal one. As Peck and Tickell (2002) pointed out, neo-liberalism has become "a common-sense of the times", because of its omnipresent character in ideology, policy and practices. According to Boaventura de Souza Santos: *Neo-liberalism is the political form of globalization resulting from US type of capitalism, a type that bases competitiveness on technological innovation coupled with low levels of social protection. The aggressive imposition of this model by the international financial institutions worldwide (...) forces abrupt changes in the role of the state and in the rules of the game between the exploiter and the exploited, as well as between the oppressor and the oppressed...* (Dale and Robertson, 2004: 151). Neo-liberal defenders claim the need to expand free market and reduce state intervention, arguing there is no other alternatives. They proclaim the failure of communist societies, social democracies and welfare states, presenting neo-liberalism as the only feasible course of our days. The best summary of neo-liberal principles and objectives lies in the Washington Consensus³. It is in this context, based on a neo-liberal kind of globalisation, in which should be located the analysis of the educational policies and the set up of a global agenda.

Within this framework, this article will be organised as follows. First the current anti-poverty educational agenda will be presented, and its thesis and foundations will be analysed. Secondly the repercussions of this agenda on Latin America will be discussed, explaining the emergence, spread and logic of action of targeted educational policies. The third and fourth sections will focus on a particular model of

educational targeting, initially explaining the features of the programme (called Bolsa Escola) and then presenting an assessment of its impacts from an educational standpoint. Finally, to conclude, the shortcomings and omissions of both targeted educational policies and the global anti-poverty agenda will be analysed.

2. The anti-poverty educational agenda: global influences on national policies.

Since the beginning of the 1990s, the struggle against poverty has served as the central pillar of the international development agenda, occupying a key place in the discourses and action priorities of both governments and international organizations. The international development summits (Copenhagen, 1995 and Geneva, 2000) and the Millennium Development Goals (approved in 2000 by the largest gathering of heads of state in history)⁴ have played a key role in shaping this agenda and setting out specific commitments, objectives and goals that would enable the progress and advances made by different countries to be assessed.

Within this action agenda, education has enjoyed a privileged role, with the understanding that it was a key investment for developing the productive capacities of poor people, easing their access to the job market and broadening their opportunities for social inclusion. This standpoint posits that investment in education generates significant benefits that are economic (investment in education has significant repercussions on income and work productivity), social (education is a tool for promoting social cohesion and equal opportunities) and cultural (education increases family cultural capital and affects factors as important as health, fertility and family organisation), all of which make it a key tool for eradicating poverty, stimulating growth and fostering national development.

The World Education Summits held in Jomtien (1990) and Dakar (2000) played a key role in this process by defining the avenues of educational policy that should be developed on a global scale in the coming years⁵. Likewise, the World Bank, the institution with the greatest ability to influence educational policy for development, has published numerous reports and documents that state the central role of education as an instrument in the struggle against poverty (World Bank, 1999a, 1999b, 2001, 2004), thus contributing to reaching an international agreement on the centrality of the education sector.

It is important to note that not all the international organizations related with education have the same capacity in setting the agenda, neither do all play the same role in its construction. Each organization has its own features, including their mandate, composition and funding. There is no doubt that the World Bank is the international organization with more interest and capacity for developing an anti-poverty educational agenda. On one hand, the WB saw in this agenda the possibility of recovering the legitimacy lost with the application of the Structural Adjustment Plans (we will get back to this issue in the following section). On the other hand, the WB has much more power, both in financial and political-technical terms, than any other organization (UNESCO, UNICEF or UNDP for example⁶) to establish and disseminate this action agenda within several countries. As Phillip J. Jones points out, although the World Bank is only one of the existing international organizations, the scale of its lending and the influence it has over economic and social policies across the developing world make it stand out (Jones, 2006). In this sense, we can argue that the Bank was the first promoter of an agenda, immediately followed, supported and expanded by many other organisations.

On the other hand, we have to bear in mind, that the international agenda is not limited to making recommendations as to the importance of investment in education in the struggle against poverty; rather in a parallel fashion it proposes the “best policies” to reach this goal: targeted intervention policies and programmes. The new Poverty Reduction Strategy Papers (PRSP), driven by the WB and the International Monetary Fund (IMF) since 1999, are a good example of this, and they include, amongst other “good

practices”, recommendations on investment in education centred on the most vulnerable sectors (Klugman, 2002). The Global Monitoring Reports on Education For All also show the importance placed on targeted interventions, recommending that attention be focused on the most vulnerable sectors in order to reach the proposed goals (UNESCO, 2002; UNESCO 2003/2004; UNESCO, 2005).

The current educational policy agenda, thus, not only indicates what education is expected to achieve, but it also sets forth how to achieve it, including a strong normative component that contributes to numerous countries’ adopting the agenda. It should also be borne in mind that the process of globalisation reinforces the importance placed on investment in education as a strategy to foster development and competitiveness (Carnoy, 2001), thus legitimising and spurring on the thesis of the global action agenda.

Within this framework, although the anti-poverty agenda does not entail any imposition by the international bodies advocating it, it has been explicitly or implicitly adopted by numerous countries and is clearly reflected in their action priorities and their educational policy models. In Latin America, in particular, starting in the 1990s, numerous targeted or compensatory educational policies have been developed which were either directly or indirectly inspired by the assumptions of the global agenda. These policies and programmes, guided by principles of positive discrimination in favour of the impoverished population, have been characterised by diversity in terms of both their way of acting and their sources of financing. Some act on demand, primarily via conditional income transfers to poor families; others act on supply, through programmes of pedagogical innovation aimed at schools with higher percentages of poor students, or investment in infrastructure and materials. Some are financed by the World Bank, while others receive its technical advice and yet other are “solely” inspired by its proposals. However, all coincide in a fundamental feature: they view investment in education as the best way of combating poverty, and they thus take on the mandate set by the global agenda.

3. Implementation of the agenda in Latin America.

To understand the particularities that the international action agenda has taken on in the Latin American region, it is necessary to consider certain socio-economic features of the region, as well as its relationship with international financial institutions. In fact, the same agenda may have, and already does have, profoundly different impacts according to where it is implemented, and there is a wide variety of mechanisms explaining the different guises the global agenda takes on in different parts of the globe (Dale, 1999). The position occupied by a certain region in the world system, and the economic, social and political particularities of the countries in the region are two key elements for understanding the “processes of recontextualisation” of the international agendas.

Latin America, in particular, is one of the regions in the world that has been most acutely affected by the recommendations on the international anti-poverty agenda, mainly due to the accumulation of three factors: the strong influence of international organizations such as the World Bank in the region, the effects of the Structural Adjustment Plans, and the high level of poverty and inequality that even now continue to characterise the region.

In effect, the emergence and expansion of targeted intervention programmes – implemented systematically throughout the entire region in the second half of the 1990s – falls within what has become known as the Post-Washington Consensus (PWC) and is part of the “second-generation reforms” proposed by the WB and the IMF after the failure of the Structural Adjustment Plans. The PWC, and the policies applied within it, was the response of the IMF and the WB to the increasing criticisms of its action and the claiming for

new policies with a “human face”⁷. Although some Structural Adjustment Plans did achieve the expected results in their macroeconomic goals, its costs were too high for the poor, and social exclusion and inequality increased in most of the countries of Latin America. In this context, the Bretton Woods institutions began to develop new discourses and policies which would establish them as global institutions in the struggle against poverty. Identifying the poor and concentrating resources and efforts on providing them with the opportunity to gain access to different markets became the predominant political strategy (Bonaf, 2007). These changes played an important role in the recovery of the increasing loss of legitimacy of the World Bank’s policies in the region.

This proved to be a turning point in the WB’s policy and led to a reorientation of its global action priorities. The 1990 *World Development Report*, published with the explicit title, *Poverty*, examined for the first time the possibility of implementing strategies that were complementary to the market-focused development model, and it acknowledged the excessive harshness of the adjustment programmes on the poorest sectors of society.

The struggle against poverty thus became one of the WB’s top priorities, and it set a dual strategy for achieving it: first, promoting growth based on the intensive use of labour by opening up the economies and investing in infrastructure; and secondly, providing basic health and education social services for the poor population (World Bank, 1990). Funnelling and concentrating the resources towards the impoverished people has become the WB’s prevailing political strategy, and targeted intervention programmes were placed on a pedestal. The WB gave two central arguments to make social programmes for the poor a top priority: first, it was associated with the need to compensate the sectors most direly affected by the structural adjustment without generating an excessive increase in social expenditures; and secondly, it was presented as the most efficient way of allocating resources, inasmuch as it allowed them to more effectively reach the poorest sectors and thus contribute to social equity (Filgueira, 2001). In this way, the WB not only managed to mitigate the existent criticisms of its management, rather it also painted itself as an organisation concerned with social welfare, the main agent behind the struggle against poverty on a global scale.

Under no circumstances, however, did the new anti-poverty discourse take into account the conditionality imposed to access loans, and it still considered that the effects of the adjustment are purely transitory and temporary, mainly associated with the lack of growth in the home countries. Thus, there is essentially no change in the stabilisation and structural reform policies; rather there is a quest for complementary strategies to these reforms that enable the poor to “participate” in the process of development. Seen from this vantage point, crucial importance is given to providing education for the poor population, viewed as a key mechanism for increasing its human capital and its chances for “activation”, thus contributing to increasing work productivity, economic growth and social development.

It is important to note the role played by the Poverty Reduction Strategy Papers (PRSP) in this new strategy, since they act as a new policy tool for the Post Washington Consensus. The World Bank’s idea is that impoverished countries, in particular those from the so called Heavily Indebted Poor Countries (HIPC), design themselves the strategies to be followed in poverty reduction (moving away, at least theoretically, from the Structural Adjustment Plans common patterns), in a participative and transparent process. According to this view, the priorities and policy content of each PRSP are supposed to be formulated by the developing countries themselves, reflecting the country’s individual circumstances, characteristics and needs. However, the World Bank provides a very detailed outline of the issues to be addressed in all PRSPs, and identifies specific policy criteria for the ultimate approval of any and all PRSPs (Ruckert, 2006: 10). The two volumes of the World Bank *Sourcebook for Poverty Reduction Strategies* (Klugman, 2002) identify four priority areas, considered as

a “correct way” to achieve simultaneously economic growth and poverty reduction. These priorities, moreover, have become compulsory conditions for a PRSP to be approved. One of these priority areas is macroeconomic and structural reform policies, such as trade liberalization and banking sector reform.

Therefore, according to the World Bank logic, economic growth continues to be one of the main factors determining poverty (if not the most important)⁸. Furthermore, macroeconomic and adjustment policies are still the best way for achieving economic growth. The logic of Post-Washington Consensus, then, is to complete, correct and complement the reforms of a decade ago but not to reverse them (Gwynne, 2004). In this sense, it could be argued that anti-poverty policies applied within the second generation reforms do not represent, at all, the end of neo-liberalism⁹. On the contrary, and following the thesis of authors like Cammack (2004), Weber (2002) or Soederberg (2005), anti-poverty policies are the best strategy of the World Bank and International Monetary Fund to maintain the neo-liberal model. As Soederberg pointed out: “...*the Poverty Reduction Strategy Papers are not about doing away with conditionality, but should be seen instead as direct responses to the above mentioned threats to neo-liberalism, which are, in turn, targeting at reconfiguring and deepening neo-liberal domination over the growing number of the poor in the South*” (Soederberg, 2005: 339). In the same way, Cammack argues that although the World Bank’s commitment with poverty reduction is real, this is only a secondary objective. Its principal objective since the 1990s is the reform of social and governmental relations and institutions in order to facilitate capitalist exploitation and accumulation on a global scale (Cammack, 2004). In fact, authors like Craig and Porter (2003) or Ruckert (2006) who defend the idea that poverty reduction strategies point out a new mode of “inclusive neo-liberalism”, are also emphatic in underlining the limitations and contradictions of this new model.

Indeed, several Latin-American researchers argue that it is precisely with the targeted intervention programmes and poverty reduction policies when neo-liberalism is fully developed in Latin America (Tavares, 1999; Lerner Sigal, 1998; Vilas, 1998)¹⁰. In this sense, it is interesting to take into account Demmers’ et al proposal about the relation between neo-liberalism and neopopulism in the region (Demmers et al, 2001). The authors suggest that in many Latin American countries (neo)populism has accompanied the rise of neo-liberalism. In fact, the coordination of neo-liberal policies with several kinds of anti-poverty and social policies, contributed enormously to expand the political base supporting neo-liberal reforms and to widen its social support during the 1990s.

Finally, it should also be borne in mind that despite the upswing in economic growth evidenced in the early 1990s and the increase in levels of social spending (both per capita and as a percentage of the GDP), the levels of poverty and inequality have remained alarmingly high throughout the entire region. The absolute number of poor people continued its steady climb during the 1990s (according to data from ECLAC – Economic Commission for Latin America and the Caribbean-, rising from 200,200 million in 1990 to 204,000 million in 1997). Moreover, despite the decline in relative poverty (shifting from 41% to 36% in the same period), it began to rise again starting in 1997 until reaching around 44%. Nor did the economic recovery of the early 1990s manage to improve the income distribution in the region, and a trend to distributive inequality continued to prevail. The percentage of income earned by the wealthiest 10% of the population remained at between 35% and 45% depending on the country, and the indexes of wealth concentration in the region showed an upward trend (ECLAC, 2002).

All these factors, thus, contribute to explain why targeted policies gained a great deal of legitimacy amongst Latin American governments, becoming widespread throughout the entire region after the second half of the 1990s. At a time of post-structural adjustment characterised by a steep decline in the social situation and the Latin American states’ inability to meet the multiple demands for social welfare, targeting was presented as

the most efficient and effective way of reaching the most disadvantaged sectors of society, as the only way of ensuring the minimal welfare levels needed to guarantee social order and sustained development in the southern countries (Tarabini, 2005).

The educational sector, in particular, was one of the most prolific in developing targeted programmes, as numerous programmes and policies that aimed their attention exclusively towards schools or students in a proven state of poverty or vulnerability were developed. Educational targeting became the central feature of the “third phase” in Latin American educational reform¹¹, and it was characterised by combining the emphasis on management, quality and competitiveness begun in the 1980s as a response to the structural adjustment, with the importance of educational opportunities that had characterised Latin American educational policies since the 1960s.

There are several examples of this kind of programmes in the region. The *900 Escuelas* project in Chile, the *Plan Social Educativo* in Argentina and the *Funescola* program in Brazil, are examples of supply-side interventions. All of these are centred on schools located in socially disadvantaged areas and concentrate the resources inside the school in order to improve the quality of teaching and learning. Providing textbooks and other teaching materials, improving school management systems or creating teacher-training programmes are some of the most common methods used by these programmes. The *Oportunidades* programme in Mexico (first called *Progresá*) or the *Bolsa Escola* programme in Brazil, are examples of demand-side intervention. They concentrate their efforts on poor families by offering conditioned cash transfers linked to the regular school attendance of their children. The amount of the transfer, the time families remain in the programme or the participation criterion are the main differences between the demand-side interventions.

The centrality given to these programmes in several Latin American countries has generated numerous debates as to the advantages and disadvantages of selective action compared to other more universal types of interventions. The suitability of the different modalities of targeting has been discussed, its designs and implementation plans have been examined, and its impacts and coverage have been analysed (Tarabini and Bonal, 2004). There has been a host of assessments, reports and reflections that analyse targeting’s capacity to effectively level poor students’ educational opportunities and to at the same time be a useful, effective tool in the struggle against poverty.

Given the impossibility of covering the multitude of debates existing on educational targeting in this paper, we shall centre our attention on analysing a specific model of targeting, which will enable certain shortcomings and opportunities in these programmes to be identified, and will serve as the foundation for a more general debate on the omissions in the global agenda. Our analysis, thus, will be limited to assessing both positive aspects and weaknesses of a specific programme which, due to its pioneering nature and scope, has constituted one of the most important compensatory educational strategies in the Latin American region in recent years. The programme is called *Bolsa Escola*, and it was implemented in Brazil in the second half of the 1990s. We will particularly examine one modality of this programme implemented in the town of Belo Horizonte (capital of Minas Gerais, a state in south-eastern Brazil).

4. A snapshot of the Bolsa Escola Programme

The *Bolsa Escola* programme (BE) consists on a monthly income transfer to poor families conditioned by their children’s school attendance, and thus it is a targeted programme with intervention in the demand. This programme is part of the Minimum Income Guarantee Programmes initiated in Brazil in the first half of the 1990s, and unlike other similar programmes implemented in Latin America (such as the Mexican

Oportunidades programme), from the very start it was developed in a decentralised fashion on a municipal scale.

The programme was first implemented in 1995 in the Brasilia region with the aim of achieving three goals: 1) increasing the families' standard of living in the short term; 2) lowering child labour rates; and 3) optimising children's staying in school with the ultimate goal of reducing future poverty. The highly favourable diagnoses on the earliest proposals implemented and the spread of the debates on this type of programme drove many other municipal governments – many of them governed by the PT (Workers' Party) – to develop education-associated minimum income programmes, which became widespread in the country during the second half of the 1990s.

The ways the programme is implemented on a municipal scale show differences in both design and management; however, generally speaking both their goals and the criteria used to choose the population converge. In terms of the goals, there is a general consensus with those set by the pioneering programme in Brasilia, with the exception of slight changes that correspond to specific characteristics of the different towns. In terms of the selection systems, the programmes share a series of criteria including family income, children's ages and time living in the town, with potentially eligible families being those with a per capita family income lower than a certain pre-defined level (generally, the poverty line) with at least one school-aged child and a minimum time of residence in the town that fluctuates from one to five years. The families that meet the requisites and are accepted for participation in the programme will receive a monthly income transfer conditioned on their child's regular attendance at school.

In Belo Horizonte, the Municipal BE Programme (BEM-BH) began to be implemented in 1997 following the same goals and selection criteria of its forerunners. However, there are certain specific characteristics in the design of the programme that are worth highlighting (Table 1):

First is the high relative amount of the benefit allocated in the programme (168R\$ per month, equivalent to €56 at 2006 values) and the repercussion this decision might have on the programme's potential impact. In fact, one of the dilemmas that this type of programme must strive to resolve is what has been termed the trade-off between breadth and intensity (World Bank, 2004), because in a context of scarce resources there are few possibilities of offering high transfers to a broad swath of the population. Thus, the choice of one type of strategy or another (breadth of coverage versus intensity of the benefit) implies a clear political decision and indicates the priority placed on one type of objective over another. Broader coverage can ensure greater equity in access to the benefit but less efficacy in achieving the goals; conversely, a higher transfer amount can enable certain families to escape from their poverty and generate mechanisms for independent wealth creation, yet it can also generate situations of inequality amongst sectors of the population that meet the eligibility conditions yet do not manage to benefit from the programme. A higher transfer can also ensure that the conditions associated with school attendance can be better met and that the beneficiaries give the programme greater social value (Bonal and Tarabini, 2006).

Secondly, what stands out is the length of time that the beneficiary families remain in the programme. The BEM-BH programme does not set predetermined timeframes for family participation, rather they may participate in it for an unlimited period of time unless: a) all their children are above the required age; b) the family moves to another town; c) their children leave the school; or d) there is a substantial change in the family's standard of living which no longer justifies its participation in the programme. This criterion is generally viewed as one of the most positive points of the programme, as it allows for ongoing work with the beneficiary families. The majority of evaluators of this type of programme stress the importance of length,

stable and lasting participation by families in order for the programme to have some type of repercussions on their family living conditions (Lavinás and Barbosa, 2000).

Finally, it should be borne in mind that, along with the monetary transfer, the programme also includes a powerful family assistance strategy starting from the idea that the income supplement is indispensable yet insufficient in itself to ensure families' dignity and social protection. The main initiatives developed within the family assistance strategy are: 1) socio-educational actions with the beneficiary families; 2) education of young adults and adults and professional qualifications; and 3) special attention to families with minors in a situation of social risk.

5. Limits and opportunities of educational targeting: An analysis of the BE Programme

The analysis in this section shall focus on the results of a fieldwork study performed in Belo Horizonte in 2004-2005¹². The analysis shall centre on assessing the educational impacts of the programme, and in particular on its repercussions on the conditions of educability of the poor students.

Conditions of educability have been defined by López and Tedesco (2002) as the set of resources (both material and not) that make possible the development of both educational practices and their potential success. From this standpoint, it is claimed that if everyone is potentially educable, it is crucial to take into account the role played by both the socio-family and the school context in the development or hindrance in this potentiality. The idea of educability, thus, is not linked to individual capacities to learn, rather to the very characteristics of the educational and socio-family system, mainly centring on the relationships between the two.

Impacts of the programme on education and educability

The conditional character of the BEM-BH Programme leads to the assumption that one of its immediate impacts will be an increase in beneficiary students' school attendance, since if they do not meet the minimum requirements in this realm the family's monetary transfer stops and does not resume until the children's school attendance once again "normalises". The increase in school attendance and the reduction of truancy during the period of primary education are, thus, direct educational impacts of this type of programme, derived from their very design and way of acting. Indeed, the fieldwork conducted allows us to confirm the positive effects of the conditions of the BEM-BH Programme from the standpoint of school attendance, an aspect acknowledged in both family accounts and in those of students and teachers interviewed.

However, the improvement in school attendance not only is a consequence of the programme (direct educational impact), but it is also linked to the economic and socio-cultural changes registered in the families as a result of their participation in it. From this standpoint, we can claim that the programme's effects on school attendance and how long children remain in school are characterised by having an eminently indirect relationship; that is, they are the result of the repercussions generated by the programme on realms that are not strictly educational. The improvement in school attendance, thus, can be viewed as both a direct and indirect impact of the implementation of the BEM-BH Programme inasmuch as it results simultaneously from the very design of the programme and its consequences on the family's standard of living.¹³

The monetary transfer associated with the BEM-BH Programme, with differing intensities, represents an improvement in the beneficiary families' living conditions inasmuch as it entails a fixed, sure and steady income, which can be used to cover the different material and educational needs. The interviews held with the beneficiary families reflect how this monetary benefit is a means for them to cover their most immediate needs,

such as food, clothing or health, and it thus entails an improvement in the living conditions that has a clear impact on the minors' educational opportunities.

Indeed, schools assume that students will arrive with a series of predispositions, attitudes and behaviours learned before starting school; they expect that the families ensure that their children are given the resources, values and habits needed for their education; and they trust that the students will reach their classrooms with the school supplies needed, the predisposition to study, the possibility of doing homework at home and a positive attitudes towards school. In this sense, we can claim that the BEM-BH Programme entails an improvement in the conditions of educability of the students receiving aid, not only because the programme requires students to attend school (direct educational impact) but also because it precisely makes this possible, inasmuch as it ensure the necessary conditions for school attendance (indirect educational impact).

The improvement in the conditions of educability of the students receiving aid from the programme not only comes from their improved living conditions from the material standpoint (consequence of the income transfer) but is also associated with processes of improvement derived from the family assistance methodology. The most important repercussions of this methodology are: (1) an improvement in the educational levels of the beneficiary mothers as a result of their participation in literacy courses, which in turn enables them to help their children to do homework and motivates them to continue studying; (2) an improvement in the network of relational resources as a consequence of participating in monthly meetings, a situation that generates many effects including an expansion of the information available about both the schools and existing low-cost extracurricular activities in the area; and (3) an improvement in the assessment, attitudes and discourses on education as a result of participating in the different socio-family assistance measures and the consequences of this participating on the families' feelings of security, capacity and control over their children's education.

We can thus claim that the BEM-BH Programme introduces an important novelty in the international agenda inasmuch as it regards the impact of poverty on education, and not only the opposite relation between them. Indeed, it is one of the few educational programmes that do not focus exclusively on school intervention. On the contrary, it is founded on the importance of education in the struggle against poverty, yet its intervention is not aimed at inside the school (the programme does not even restrict spending of the money transfers on strictly educational expenses) rather it is aimed at improving student's living conditions. Thus, it is a programme that is founded upon the explicit acknowledgement of the influence of socio-economic and family factors on the educational opportunities of poor sectors of society, and instead of merely acknowledging this fact it strives to influence it. From our standpoint, these factors make it a programme with a clear advantage over other educational anti-poverty strategies.

Shortcomings and omissions of the programme

Despite the importance of the direct and indirect educational impacts generated by the BEM-BH Programme, we can also identify a variety of shortcomings and omissions that lower the chances of expanding educational opportunities for poor students and thus lower their level of future poverty. In this section, we shall discuss the limits of the programme in two fundamental aspects: the difficulty of generating positive impacts in the area of educability in all the beneficiary families, and the difficulty of ensuring an improvement in the conditions of educability from the school standpoint.

From the family standpoint, the first factor to highlight is the vast heterogeneity of economic and social situations that characterise the families benefiting from the programme. Despite the fact that they all share a common situation of poverty, their living conditions differ widely according to factors such as income levels prior to the implementation of the programme, the composition and stability of the family structure, the

situation of the different family members – both adults and minors – in the job market, the neighbourhood where they live and the educational levels of the adult family members. These factors point to different degrees of family poverty, they identify different situations of social exclusion and, in short, they play a part in the type and intensity of impacts of the monetary transfer in different family and social settings (Bonal and Tarabini, 2006). Although the monetary transfer by itself is positive from the standpoint of material living conditions, its effect on other non-material dimensions of poverty is totally different according to the different family situations.

The diverse impacts of the programme are reflected in all the dimensions defining the conditions of educability from the family standpoint – educational assistance, help with homework, valuing activities done at school and family participation at school, amongst others – thus enabling us to claim that the families' living conditions prior to their entry into the programme are the key to understanding the different intensity of its educational impacts, as well as their potential duration and stability.

In this sense, despite the fact that the BEM-BH Programme is one of the most ambitious of its class, its impact on education and educability continues to present a high degree of diversity if other complementary measures or policies, that help elevate the standard of living of those families in more dire situations of vulnerability, are not simultaneously implemented. We are thinking in social and economical universal policies addressed to extend labour market opportunities or to improve the health system, for example. We have also in mind several measures directly addressed to improve living conditions of poor families, like housing or urban policies. It cannot be ignored that the families participating in this type of programme live in situations of poverty and indigence that, though they vary in degree, are characterised by the common challenges linked to unemployment, poor living conditions and health problems. In light of this situation, the monetary transfer – despite its high relative value in the Belo Horizonte municipal model – remains insufficient by itself to change certain families' practices, strategies and positions towards education.

Despite the programme's actions, situations of "ineducability" continue to be perpetuated, which cannot be overcome without the intervention of other types of policies. If educability conditions were defined as a set of needed resources (both material and not) for making education possible, "ineducability" conditions refers just to the contrary situation. A situation in which there aren't the minimal conditions for students to participate and have success in school. These two concepts place the emphasis on those factors associated with poverty that allow (in the case of educability conditions) or hinder (in the case of "ineducability" conditions) the poor from taking advantage of educational opportunities. The maintenance of "ineducability" situations, therefore, refers to the lack of resources of poor students. Lack of material and non material resources that difficult enormously their possibilities to attend, remain and have success in school. Drug dealing; lack of public investment in the *favelas*; lack of stable, high quality employment; insalubrious dwellings; and child labour (both domestic and outside the home) are just some of the situations characterising the everyday lives of these students and their families, which continue to hinder them not only from possibilities of educational inclusion but especially from the chance of social inclusion. Thus, it is crucial for targeted policies to be articulated in conjunction with universal social policies that enable the causes behind poverty, inequality and social exclusion to be attacked.

The variety of impacts of a programme like BE on the conditions of educability of minors depends not only on their family situations but also on the conditions and characteristics of the schools themselves. School attendance itself does not presuppose greater educational attainment, nor does it mechanically generate a change in the attitudes and positions towards education of both adults and minors. On the contrary, the role played by the school, the way it is organised, its way of dealing with learning difficulties and its way of forging

relationships with students' families are the keys to improving or hindering the educational careers of the students benefiting from the BE Programme (Tarabini, 2005).

The BEM-BH Programme, in particular, pretends to be articulated with a municipal educational policy oriented to improve the quality and equity of the educational system itself. Beyond the theoretical complementariness between supply and demand educational policies, however, there are still numerous problems and flaws in the educational system that perpetuate the inequalities between students from different social echelons. As an example, these problems include the lack of secondary education opportunities at schools near the poor families' place of residence, the high concentration of poor students at certain schools and the highly curtailed time that students spend at school each day, as low as four hours. In light of this situation, and despite the fact that these flaws cannot be attributed to either the BE Programme or other similar targeted educational policies, we can claim that greater interaction with other universal educational policies would contribute enormously to palliating this situation.

If the goal is to ensure that poor students' educational careers are developed under conditions equal to those of the rest of the student body, it is crucial to continue to make headway in improvements in the educational supply through educational policies that, along with monetary transfers, make possible an effective improvement in both the teaching conditions of the staff and the learning conditions of the students.

5. Conclusions: Omissions from the agenda

Our analysis of the Bolsa Escola Programme has revealed some of the shortcomings of educational targeting that enable us to embark on a more general reflection on the global anti-poverty agenda. Certainly, we will only be able to evaluate many of the effects of the targeted educational policies in the long term, yet a detailed analysis of the BE Programme shows indicators that lead us to question the efficacy of this type of programme as an "educational" mechanism for overcoming poverty. The programme's repercussions on families' improved living conditions cannot be denied, and its effects on increased school attendance of students receiving aid are also clear. However, these improvements do not lead children of poor families to go on to have successful educational careers; much less do they lead to a change in their long-term situation of poverty.

The positive effects of the programme from the educational standpoint, as we have seen, are characterised by its enormous heterogeneity and by its remaining subject to structural factors, both socio-economic and school-related. The magnitude of social exclusion in the region leads one to ponder the limits of targeting as an instrument for reducing poverty, especially for reducing a structural poverty that goes beyond mere improvements in consumption in the short term. Nor do these types of policies appear to be sufficient as a strategy for improving the schooling conditions of all the beneficiary students so they can aspire to educational attainment.

It is true that, in general terms, the Latin American educational situation has improved a great deal in recent years. The educational expansion has enabled it to achieve virtually universal primary education, it has considerably increased the schooling rate in secondary education, and it has raised the population's average number of years of schooling (ECLAC, 2002). However, this situation has not managed to reverse the existing inequalities in the educational system (especially the social polarisation according to the ownership of the schools), nor has it substantially modified the drop-out figures, which remain alarming despite having fallen in relative terms in recent years. The problem of school drop-outs is further aggravated in of children of poor families, and early drop-outs – that is, before finishing primary school – are particularly high (ECLAC, 2002).

This situation shows some of the shortcomings of the targeted policies for reversing the educational situation of the poor population by themselves and ensuring uninterrupted educational careers with the potential for success. It is true that educational targeting starts from an (implicit) acknowledgement of the insufficiency of the educational expansion to ensure equal educational opportunities amongst different social groups and justifies its intervention as a compensation for the situation of disadvantage suffered by the most vulnerable groups. However, this acknowledgement will not result in an effective levelling of educational opportunities unless there is a clear articulation with universal educational policies that are aimed at attacking the structural shortcomings of the educational system. Indeed, the BE Programme broadens the educational opportunities of the poor students as it ensures their regular school attendance and improves their conditions for taking advantage of this education. Still, it remains a limited strategy for dealing with the structural problems of education.

It should also be borne in mind that this type of programme can only influence inequalities in access to education, but not on the remaining dimensions of educational inequality. Obviously, access to and attendance at school are crucially important, and in themselves they generate positive impacts beyond academic performance. The children of poor families, however, not only have the right to go to school and attend regularly, rather they should also have the right to a quality school that ensures that they complete the different educational cycles with the same level of learning as other social echelons, and that enables them to use this learning in their subsequent foray into the working world.

As indicated by Morrison (2002), poor families are sensitive not only to the costs and quality of education but also to its future usefulness. If the families do not perceive that the investment in education will serve them in their future and to access possible jobs, demotivation will arise, which usually translates into school drop-out. When the same situation occurs in families from higher socio-economic strata, given their greater capacity and wider range of choices, they tend to translate their demand strategy to private schools, and school drop-outs are virtually unheard of amongst these sectors of the population.

On the other hand, the increase in poor students' access to and attendance at school generates new challenges for the educational system, inasmuch as it strives to welcome the poorest students into the schools. This situation may also contribute to further concentrating the most disadvantaged students into certain schools and increasing the polarisation of school networks (especially amongst private and public schools, but also amongst the public schools themselves). Within this framework, if targeted policies are not articulated with an effective plan aimed at improving the quality of teaching, they are unlikely to ensure the conditions of educational equity needed to make headway towards school attainment amongst these groups.

Moreover, the educational improvements generated by programmes such as Bolsa Escola can only be guaranteed during primary education since in the majority of cases they only cover students up to the ages of fifteen or sixteen. This shortcoming becomes particularly important if we take into account the displacement in the minimal levels of educational investment generated by globalisation, and it puts into question the ability of this type of programme to reduce the levels of future poverty of the beneficiary population through investment in education. Indeed, more than ten years ago, ECLAC pointed out the needed to have more than ten years of schooling in order for investment in education to have some kind of impact on individuals' prospects for social mobility (ECLAC, 1994).

As Filmus (2001) claims, "education is more necessary but less sufficient". That is, in the information age, education is indispensable to activate strategies of individual mobility and job placement, but given the increasing demand for education, there is a devaluation of the social usefulness of the degrees earned. Within this framework, having a school diploma is no longer sufficient to ensure labour (and social) inclusion, much

less to emerge from poverty. Thus, it is necessary to seek other strategies that complement the investment in education and pave the way for the shift from what is necessary to what is sufficient.

This situation puts into question one of the underlying assumptions that guides both the global anti-poverty agenda and the development of targeted policies. The priority placed on education in the struggle against poverty starts from the assumption that a greater investment in education will furnish the knowledge, skills, aptitudes and abilities that individuals need for future incorporation into the labour market. What is more, this assumption is supported on the illusion that this market is capable of absorbing all the trained citizens by offering them the salaries they need for social inclusion. The first omission in these assumptions, thus, is linked to the very structure and functioning of the labour market, since it does not consider this market's opportunities for possible individual insertion. Placing all the burden of the struggle against poverty onto investment in education (and ultimately in the use that each individual makes of this investment) thus entails ignoring the multidimensional nature characterising situations of poverty, inequality and social exclusion suffered by numerous individuals and social groups.

Obviously, education is necessary for labour and social inclusion, but if the social and economic conditions in which numerous social groups live are not improved, solid educational development can hardly be guaranteed. As stated by López and Tedesco (2002), education is a necessary condition for equity, but it is crucial to ensure a minimum level of equity for education to take place. Stromquist is also equitable by pointing out that "it is not that the families are poor because they have no education, rather what happens is that they have no education because they are poor" (Stromquist, 2001: 43).

The factors examined up to now enable us to identify two major omissions in the global anti-poverty agenda:

First, it is an agenda that focuses on investment in education as a strategy for overcoming poverty, yet paradoxically, it omits the effects that poverty itself generates on education. In effect, the current educational policy mandate embraces the virtues of education as a mechanism for "activating" the poor, yet it does not encompass the entire set of objective impediments that limit the real possibilities for poor people to make the expected investments in human capital. Likewise, it is forgotten that for education has some effect on reducing poverty, it is crucial to ensure equitable, high quality education for the entire population, an education that offers all the social groups the chance for success.

Secondly, there is excessive emphasis on compensation programmes, neglecting the fact that many of the countries that will implement them are plagued by structural problems of poverty and inequality. Obviously, targeting can be a useful strategy for diminishing both educational and social inequality inasmuch as it prioritises channelling the benefits to the neediest sectors. From this standpoint, the implementation of mechanisms that contribute to compensating for the initial inequalities of the social and economically most vulnerable individuals and groups may have positive effects on equity and social justice. In contexts marked by extreme levels of poverty and inequality, however, targeting is incapable of reaching all the needy groups and individuals and reinforces the need to distinguish between the "deserving poor" and the "undeserving poor" (Offe, 2002). Thus, the global agenda neglects the fact that targeting can only be an effective and equitable anti-poverty strategy if it is combined, framed and made compatible with universal programmes aimed at the population as a whole.

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¹ The central argument of the “world institutionalists” is that the institutions of the nation- state, indeed the state itself, are essentially shaped at a supranational level by a dominant world (or Western) ideology. Here, states have their activity and their policies shaped by universal norms and culture. In this context, the development of national educational systems is explained by universal models of education, state and society, rather by distinctive national factors. The major demonstration of these ideas, following their argument, is the existence of a global isomorphism of curricular categories across the world (Dale, 2000). From this point of view homology, isomorphism, convergence or homogeneity are the central concepts for explaining educational policies in a globalisation era.

² As Jessop remarks, globalisation assumes different forms in different contexts and can be realized through different strategies – being neo-liberal globalization just one of them (Jessop, 2003: 2)

³ The concept and name of Washington Consensus was first presented in 1989-90 by John Williamson, an economist from the Institute of International Economics, an international economic *think tank* based in Washington D.C. Williamson used the term to summarize the objectives with regard to the structural reforms demanded on Latin American governments by the World Bank and the International Monetary Fund in the context of the debt crisis of the 1980s. These objectives were specified in ten policy recommendations, including state fiscal discipline, trade liberalization, privatization of state enterprises and services and foreign direct investment, among others. Although these programmes were specifically planned for Latin American countries, they became the basis for worldwide neo-liberal programmes.

⁴ The Millennium Development Goals (MDG) represent an international commitment to tackle world poverty as a part of the road map for implementing the Millennium Declaration, which was adopted by 189 member states at the Millennium Summit in the year 2000. To measure progress over time, eight goals to be achieved in 2015 were identified. These eight goals are: 1) eradicate poverty and extreme hungry, 2) achieve universal primary education, 3) promote gender equality and empower women, 4) reduce child mortality, 5) improve maternal health, 6) combat HIV/AIDS, malaria and other diseases, 7) ensure environmental sustainability, 8) develop a global partnership for development.

⁵ Although the Education for All (EFA) Conferences are not an integral part of anti-poverty programmes they play a key role in strengthening the link between education and poverty. In fact, both Jomtien and Dakar goals highlight the importance of education for the most vulnerable and disadvantaged children.

⁶ The three major UN educational organizations, UNESCO, UNICEF and UNDP only have capacity for making educational recommendations and declarations and, therefore, their ability to influence on national educational policies is much more indirect. The WB instead has a punitive capacity that directly determines the development of educational policies.

⁷ The UNICEF publication “Adjustment with a human face” in 1987 contributed enormously to make people aware of the Structural Adjustment Plan impacts, spreading the criticisms against the World Bank intervention. During the 1990s there was a growing legitimacy crisis of neo-liberal capitalism, evidenced by the increasing protests against neo-liberal globalisation that materialized throughout the whole decade. Seattle 1999 was the culmination of this process. At the same time, there were also critical voices inside of the International Organizations themselves. Joseph Stiglitz, Chief economist of the World Bank from 1996 to 2000, is the best example of this. He has been very critical with some of the core assumptions of the Washington Consensus and the consequences of the Structural Adjustment Plans, playing an important role in the theoretical articulation of the Post Washington Consensus.

⁸ The World Bank *Sourcebook for Poverty Reduction Strategies* (Klugman, 2002) starts precisely with a discussion of why economic growth matters for poverty reduction.

⁹ Some authors (Booth 2003; Driscoll and Evans 2005; Stiglitz 1998) argue that Post Washington Consensus represents a fundamental rupture in development thinking and a progressive move away from neo-liberalism.

¹⁰ It is important to note that the origin of neo-liberalism in Latin America coincides with the debt crisis in the 1980s. Neo-liberal policies were presented in Latin America as the necessary and inevitable way to solve the debt crisis situation and overcome the perceived failure of the previous political economy paradigm of inward orientation. As Silva (2004) remarks, a general consensus emerged among most Latin American governments about the need to abandon the traditional pattern state-led industrialization and to modernize their economies by adopting neo-liberal free-market policies. In this context, in the 1980s neo-liberalism spread through the whole region, although each country presents its own features. There are, however, some exceptions of this rule. In Chile for example, neo-liberal policies began in the 1970s with Pinochet’s regime. In Brasil, instead, the experts talk about “late neo-liberalism” as it was applied under Cardoso’s governments in the 1990’s.

¹¹ The first phase in educational reform took place during the 1960s and was characterised by the quantitative expansion of the system, with special emphasis on broadening access, particularly to primary education. The second phase of reforms, however, initiated in the 1980s, was characterised by abandoning the quantitative ideal as the backbone of educational reform and shifting the emphasis of the reform onto improving the quality, management and productivity of the system (Reimers, 2000).

¹² The fieldwork was undertaken based on a qualitative methodology entailing interviews with three key stakeholders: mothers who were beneficiaries of the BEM-BH Programme, students who were beneficiaries of the programme, and the teaching and management staff of the schools hosting students who were beneficiaries of the programme.

¹³ We have taken the distinction between direct and indirect impact from R. Dale, and in the realm of this study it should be understood as follows: the direct educational impact of the BE Programme is what is derived from its nature, design and method of implementation. We can say that the improvement in school attendance is a direct educational impact because it is contained

within the BEM-BH Programme's explicit goals and is a requirement for continuity in the programme: if the child does not attend school regularly the monetary transfer is withdrawn and the family no longer participates in the programme. The indirect educational impact, in contrast, is characterised by not being intentional, even though it may be predictable. That is, it is what is derived from the changes experienced in the family's living conditions as a result of participating in the programme and thus is a consequence of the impact generated by the programme on the improvement in family life.