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Editorial

LEFT RETRENCHMENT AND RIGHT RESURGENCE IN LATIN AMERICA: NEOLIBERALISM REDUX?

Barry Cannon

This issue of Policy and Practice on the theme ‘New Models of Development: Lessons from Latin America’ is very welcome for a number of reasons. First, Latin America is rarely discussed in terms of development these days – many agencies are pulling out of the region and indeed some of its larger states are now known as ‘emerging economies’ rather than developing countries. Yet some countries in the region – such as Honduras, Nicaragua, Bolivia, Paraguay or, indeed, Haiti if we include the Caribbean region – remain very poor and can only really be regarded as developing. Second, the emphasis on learning from Latin America is welcome. Latin America’s development experience, I would contend, is not simply applicable to the ‘development context’ but also, if we take Payne and Phillips’s (2010) wider political economy concept of development, as relevant to all states including those traditionally regarded as ‘developed’. Third, the issue is timely as Latin America may be going through one of its periodic historic shifts, as Gutiérrez and Vega Cantor’s article on the Latin American Left here seems to suggest, with a waning of the post-neoliberal Left, dominant in the region since the beginning of the millennium, and a resurgence of the neoliberal Right.

Latin America then remains a key site of hegemonic struggle between neoliberalism and contesting development models. Some of its states, such as Chile, were among the first to experiment with neoliberalism in the 1970s, while in more recent times as O’Connell points out here, citing Kirby (2012: 27), Latin America was ‘the only region of the world where a “fundamental change” of development model’ was occurring. Latin America then can be considered a ‘development bellwether’ – a site of contestation
between development concepts where important future trends and patterns can be discerned, which can sometimes lead to the generation of new concepts, theories and even models of global reach and impact.

The three Focus articles appearing in this issue – José Gutiérrez on participatory action research in the context of Colombia; Chris O’Connell on the emergence and impact of the Yasunídos movement in support of the Yasuní national park environmental protection initiative in Ecuador; and, Su- ming Khoo and Aisling Walsh on two experimental tertiary education institutes in Mexico – all point to the importance of bottom-up initiatives aimed at consciousness raising to effect progressive change. Each article to some degree illustrates the enormous contribution which Latin American intellectuals have made to development practice. Figures such as Paulo Freire and Orlando Fals Borda are identified as key to developing techniques which ensure the participation of the poor and marginalised in decision-making processes around development initiatives. Furthermore, these articles point to the wider significance of such approaches, which go beyond what is traditionally regarded as ‘development’ and into the realm of the political. In each article grassroots and bottom-up initiatives and approaches are seen as having direct significance for development outcomes resulting from policy decisions taken in the political arena. The essential question, then, to which each article speaks in its own manner, is how to ensure that such input from the grassroots, developed often through the participatory approaches pioneered by Freire, Fals Borda and others, can be integrated in an effective and faithful manner into state policy – or indeed if they should be at all. Hence, a central theme emerging in these articles – and indeed the Viewpoint piece by Gutiérrez and Vega Cantor – is this relationship between state and civil society in contemporary Latin America.

Case studies are different in each paper. O’Connell illustrates how the law of unintended consequences intervened to allow a state-sponsored environmental educational initiative in Ecuador, based on Freirean principles, to inadvertently lead to the emergence of a movement in defence of an abandoned state initiative aimed at preserving the Yasuní national park from
oil exploration. As O’Connell states in his conclusion, the inventiveness of this movement, using social media and other strategies to build momentum, shows the importance of grassroots initiatives and educational techniques to maintain the conditions for critique and protest, even under Left-led governments with supposed progressive objectives. Khoo and Walsh’s article, on two alternative, community-based tertiary education colleges in Mexico, shows a community in revolt against a (Right-led) state, building ‘autonomous educational niches’ which seek to re-route ‘development according to local objectives of economic viability, dignity, and sustainability’. Gutiérrez’s article on Participatory Action Research (PAR), Orlando Fals Borda and Peasant Reserve Zones in Colombia, also seeks to underline the emancipatory potential of liberationist educational (and research) methodologies, such as PAR, to build alternative, autonomous grassroots social and political organisations among the poor and marginalised. In both cases – in Mexico and in Colombia – we see an emphasis on autonomous organising, not simply independent of the state but with a view to permanent disengagement from it, to further embed such autonomy. In neither case is contact with the formal (electoral) Left seen as of any consequence.

This aim is also the cornerstone of Gutiérrez and Vega Cantor’s argument in their Viewpoint article on the Latin American Left governments. They rightly point to the key role that such participatory educational techniques had in forming social movements, which helped create the conditions for the rise of the current crop of Left governments in the region. Yet these governments, the authors argue, have betrayed the aspirations and trust of these movements, showing the need for ‘an abandonment of ... electoral politics ... [in favour of] collective leadership and ... a process which requires new channels of participation and decision-making’; these to be developed through the implementation of techniques such as PAR. Hence the authors seem to be calling for a break from the state as it is currently configured, the implementation of a process of popular re-education along PAR lines, and, on achieving the required level of consciousness, the
reconfiguration of a participative, non-representational and non-electoral state.

While these are all worthwhile long-term strategic aims, what of the short-term, of the now? To answer this question it is instructive to cast a glance at the activities of the Right in Latin America in the present context, including their strategies and ideological and development aims; indeed, to learn from the Latin American Right to inform strategy on the Left. In a forthcoming volume, *The Right in Latin America* (Cannon, 2016), I provide an overview and interrogation of the Right in the current context. Using Michael Mann’s framework on social power, I argue that the Right is underpinned by elite power in four distinct but inter-related networks: economy, ideology, politics and the military – all of these intersected by transnational power. In each of these I find that neoliberalism is hegemonic, precisely because in a context of inequality, it fosters, promotes and perpetuates elite power. In those countries most dominated by neoliberalism – primarily Chile, Peru, Colombia and Mexico, but also many of the smaller Central American countries such as Costa Rica, Guatemala and Honduras – neoliberalism is so deeply embedded in these power networks that it is extremely difficult to effect a decisive change in a heterodox direction, even if there is a viable Left party in the country and it attains power (as can be seen in Chile, for example, or indeed El Salvador).

Moreover, this status quo is supported transnationally: through international sponsors of Right-wing or liberal political parties and think tanks; through FDI (foreign direct investment); through membership of international organisations, such as the OECD (Organisation of Economic Cooperation and Development), with Mexico and Chile being members, and possibly Colombia in the near future, as well as through the enhanced influence of the International Monetary Fund (IMF) and the World Bank in these countries – an influence rejected by Left-led countries; through free trade agreements with the US and the EU; and, through the formation of new regional groupings based on neoliberal principles, such as the Pacific Alliance (PA). The PA, furthermore, could become the incubus for a wider
hemispheric free trade agreement once the Right gains power in the main Mercosur countries which, it could be argued, it is now en route to achieving. Moreover, it could conceivably link up to the super-free trade blocs formed by the Trans-Pacific Partnership (TPP) between the United States and other Pacific Rim countries in Latin America and Asia, and the Trans-Atlantic Trade and Investment Partnership (TTIP) currently under discussion between the US and the EU, as some of the more breathless commentators have suggested (George, 2014). For all these reasons, I call such countries right-oriented state/society complexes, to help signal the depth of embeddedness of neoliberalism in both the state and society, tempered, nevertheless, with a certain level of flexibility in terms of the presence of some Left organisation and policy input, but never to the extent of threatening in any meaningful way the existing neoliberal order.

In counterposition to these countries, I would argue that the changes implemented by the Left governments in the region, while undoubtedly disappointing for many of the social movements, nevertheless have been of sufficient depth and reach to present a challenge to the Right and the furtherance of the neoliberal model. In my book I show that in the Bolivarian countries, as well as in Argentina and even in Brazil, there has been a challenge to the neoliberal model in one or more of the power networks in each of these countries: economically with a halt to privatisations and in some countries nationalisations among other measures; ideologically with new laws limiting private media oligopolies, including ownership; politically through repeated electoral wins; militarily through achieving more civilian control over the armed forces, and in many cases reducing budgets and personnel; and, transnationally through the construction of new regional groupings that pointedly exclude Washington. Most importantly, there have been reductions in socio-economic inequality and poverty and increased action, in some cases, to correct gender and ethnic inequalities.

All these changes have signalled a sufficient threat to Right-wing elites to prompt their use of a wide variety of strategic responses which I group into three levels: electoral, mobilisational and extra-constitutional. In
terms of electoral strategies, in every country the Right has continued to contest elections, with important recent gains in 2015 in Argentina, with the election of Mauricio Macri and in Venezuela, with the opposition achieving a two-thirds majority in the National Assembly. In terms of mobilisational strategies, elites in Venezuela, Bolivia, Argentina and Brazil have utilised what Fairfield (2015) has called their instrumental power in the economy and in the media, among other areas, to mobilise huge sections of the population to help bring down Left governments. These tactics can also be augmented by extra-constitutional strategies such as the successful coup in Honduras in 2009; the aborted coup in Venezuela in 2002; and, a further attempted coup in Ecuador in 2010. We have also seen the introduction and refining of what I call ‘smart’ or ‘soft’ coups in Paraguay in 2012 and also possibly in Brazil currently, whereby a country’s institutions, dominated by the Right, are used to remove a sitting Left president. Nevertheless, it is important to note that these different levels of strategic activity are not mutually exclusive, but rather are often used concurrently and in a dynamic, flexible and dialectical manner.

The Latin American Right, then, in the current context can be said to show the following characteristics. First, a consistent unity of ideological purpose which is dominated by neoliberalism; second, a remarkable strategic diversity and flexibility in pursuit of this ideological purpose; third, considerable strategic transnational alliances and links with international financial institutions (IFIs), with powerful foreign governments, and with private organisations, such as political parties and think-tanks, as well as the monopolised, private international media. Finally, its discursive insistence on issues such as crime, corruption and economic efficiency, chime well with voter concerns, many of which are being worn down by economic uncertainty brought on by the end of the commodities boom and the continuing ‘war on drugs’ in the more northern countries and beyond.

The Left needs to respond to these challenges urgently if its project of building a post-neoliberal order is to continue. It needs to re-establish links with the grassroots in such a way that enhances government; it needs to
build a unifying counter-hegemonic narrative, which can attract and engage voters; it needs to exploit divisions in the Right – between radicals and moderates and with regard to differences on social welfare rights and on inequalities; it must assess its own ‘structural’ power and learn to use it effectively – or construct new elements, such as think-tanks, alternative media, grassroots discussion and mobilisation – which pertains directly to the Left, rather than the Left-led state; it should pursue a more aggressive transnational strategy, linking up with new Left alternatives in Europe, such as Syriza in Greece or Podemos in Spain, augmenting its reflexive capacity and international weight; it needs to take more seriously issues which the Right capitalises on such as security/crime, economic efficiency, and corruption, while carving out a space for itself around identity inequalities of gender and ethnicity.

Most of all it needs to highlight what it does well, while pointing out flaws in Right arguments and policy positions; simultaneously it needs to produce innovative and effective policy solutions which further rather than reduce or retract the political and social inclusion of the majorities. An urgent part of that task will be to articulate a new and more vigorous economic model which can leave behind the divisiveness, inequities and environmental dangers of extractivism. Overall, it needs to work relentlessly within the cracks and seams of the current model in order to learn from and reflect on its own praxis, as many of this issue’s articles recommend, so as to construct a ‘pragmatic post-neoliberalism’ that can counteract the formidable challenge of the Right.

Hence, rather than a single strategy based on consciousness changing effected by PAR and other reflexive and organisational techniques, crucial though this is, the Left in fact needs a twin-track strategy. The first is long-term based around such participative strategies as signalled by the articles in this issue; the second, however, must be short-term with an aim to securing Left dominance over the state. And both these strategies need to be united around a basic set of objectives, that is ‘a counterhegemonic narrative around which centre-Left and Left forces can coalesce for progressive
change’ (Perla, Mojica and Bibler, 2013: 328), or as Burbach et al. (2013: 158) term it, ‘a singular socialist horizon’, which is open but without ‘divisions that allow the Right to strengthen’.

While the experience with the recent Left governments may have been discouraging on so many levels, it is important to also recognise and reflect on the positive – the reductions in inequality and poverty and the introduction of anti-racist measures and discourse, for example. Abandoning electoralism will mean ceding the state to the Right with the inevitable negative outcomes in terms of the reversal of these advances: increased inequality, continued and intensified environmental destruction, and increased ethnic, and possibly, gender discrimination. Furthermore, it risks the deeper embedding of the neoliberal ‘development’ model in those countries which have been led by the Left, to the extent seen in those countries identified here as dominated by neoliberalism and grouped into the Pacific Alliance. This is a stark choice and one not to be taken lightly. The reaction by progressive forces to it could well determine the extent of neoliberalism’s global dominance in the medium to long-term.

References


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**Focus**

**Regenerating Education from Below – Endogenous Tertiary Education in Alternative Development Niches**

Su-ming Khoo and Aisling Walsh

**Abstract:** This article discusses initiatives in Mexico to create alternative educational spaces. Following the 1994 Zapatista rebellion, subaltern social actors rejected mainstream education, seeing it as a failed means for imposing homogenisation, statism, and neoliberalism. We discuss two examples of alternative tertiary educational spaces in Mexico’s poorest states, Unitierra in Oaxaca and CIDECI in Chiapas. Their alternative paradigm of endogenous education regenerates education from below, rerouting development according to local objectives of economic viability, dignity, and sustainability. They re-envision local development using education as an enabling force to create space for a plurality of human concerns and ways of being. The discussion explores the potential of such autonomous educational niches, as well as their limitations from a rights-based perspective. It reflects on the broader possibilities of counter-hegemonic popular education, particularly within the Latin American region, envisioning ‘a world of many worlds’ based upon strong claims for cognitive justice.

**Key words:** Neoliberalism; endogenous education; indigenous resistance; development alternatives; Mexico.

**Introduction: Educational inclusion, Zapatista resistance, and alternatives to neoliberalism**

Educational inclusion through the expansion of formal education has been the key strategy promoted by the World Bank and governments to foster development, reduce poverty, and achieve equity. Yet critics point out
education’s complicity with neoliberalism and how programmes for inclusion can function to reproduce inequality. Neoliberal discourses of educational inclusion denigrate the poor and institutionalise surveillance of them. Educational strategies targeted at the poor in developing countries replay symbolic control through cultural production and reproduction (Bernstein and Solomon, 1999). Instead of opening channels for social inclusion, such programmes may serve to ‘pedagogise poverty alleviation’ (Rambla and Veger, 2009: 473).

Marginson (2008, 2011) presents a more differentiated view of higher education in the global frame. His influential analysis (2008) sketches the ‘global field and global imagining’ of education, employing a combination of Bourdieu and Gramsci’s theories to distinguish an ‘autonomous’ subfield of elite higher education from a ‘heteronomous’ subfield of large-scale mass education with commercial characteristics. ‘Autonomy’ is associated with restricted production and hierarchical cultural status, while ‘heteronomy’ is associated with a hierarchy driven by economic capital and market demand. Between the autonomous and heteronomous subfields lies a range of intermediate institutions ‘that combine the opposing principles of legitimacy in varying degrees and states of ambiguity’ (Marginson 2008: 305). This article draws attention to the possibility of counter-hegemony, through the existence of an alternative, resistant mode of autonomy which relies on alternative legitimacy claims. The autonomy of endogenous education is either non-market based, or only marketised in a restricted, community-defined sense. This ‘deglobalised’ notion of autonomy from below is framed within horizontal, resistant, and alternative regional and global fields and imaginings.

Rizvi and Lingard argue that neoliberal globalisation has a dual effect: reducing ‘some aspects of structurally imposed impediments to social equality’, but simultaneously reinforcing or even deepening social hierarchies (2010: 140). Given this duality, increased formal access to schooling may not translate into equitable outcomes. Indeed, improving simple access may
be counterproductive, setting up expectations that create further social alienation if they are unrealised.

Demands for justice, educational or otherwise, have become more complex. Issues of identity, difference, and cultural recognition have come to the fore, leaving mainstream educational efforts too narrow in their conceptions of equity. The diversity of considerable and growing disparities that accompany globalisation heightens the need to understand issues of educational justice in relational and not simply quantitative terms. The struggle for recognition has rapidly become the paradigmatic form of conflict, as contemporary social movements have emerged. Group identity is just as important as class conflict, as material injustices are often enmeshed with demands for the recognition of difference (Fraser, 2008). Heterogeneity and pluralism have become the norms against which the demands for educational justice are articulated (Rizvi and Lingard, 2010: 159).

Stromquist and Hennessy note that the fundamental role of education in social movements remains somewhat invisible (2012: 638). We hope to raise awareness of this education in Latin America by offering an account of resistant, endogenous education in Mexico. It is based on one author’s observation and attendance at Unitierra and CIDECEI-run public events and several interviews and conversations with Gustavo Esteva over two months in 2011, and documentary analysis together with a critical review by both authors of relevant theoretical and comparative studies.

On 1 January 1994, the Zapatista Army for National Liberation (EZLN) launched an armed rebellion against the cultural, political, and military hegemony of the Mexican state and its support for neoliberalism. The rebels’ opposition to the North American Free Trade Agreement (NAFTA) presented an early and dramatic instance of organised popular opposition to neoliberal globalisation (Castells, 1997). The Zapatistas united a network of rural communities, mainly comprising indigenous and mestizo peasants across the state of Chiapas, in the name of rights, autonomy, and resistance, and in protest against discrimination, socio-economic
marginalisation, and cultural assimilation. The Zapatistas viewed NAFTA as a colonial policy continued by the postcolonial state, ‘a final death sentence’ for the rural poor and indigenous communities in particular, as it threatened to erase the remaining survival spaces for local indigenous economies and communities. For some, the 1980s heralded an ‘impasse of development’ (Schuurman, 1993), followed in the 1990s by ‘post-development’ school of thinking. The latter included the Mexican intellectual, Gustavo Esteva, who proposed that ‘development’ was no longer a viable concept (Esteva, 1992; Sachs, 1992).

The Zapatistas became an icon for global resistance and solidarity in this context. theirs was a ‘postmodern’ revolution, aiming neither to seize power, nor to seek change through state mechanisms. Instead, they argued for the creation of a ‘future within the present’ based on autonomous organisation, the revitalisation of indigenous ways of life, and the founding of participatory, bottom-up democratic structures. Explicitly rejecting the neoliberal state and market solutions, they strived instead to pluralise Mexico’s polity and society, envisioning a future ‘world of many worlds’.

**Pedagogical revolution and the critical transformation of development**

Educational transformation is central to the Zapatistas’ struggle. Their vision for vindicating basic rights such as health, education, and freedom from poverty demands a reworking of democracy based on cognitive as well as material social justice. They are described as ‘pedagogical guerrillas’ who use education to re-tell history and reiterate local identity (Johnston, 2000: 463), transforming education from a tool of oppression into an instrument of resistance and liberation. Critical of assimilationist state ideology and mindful of community needs, they demand that education be re-rooted in local languages, communal systems of economic production, and traditional ways of knowing and learning (Reinke, 2004: 490). The Zapatistas established a network of autonomous, community-based primary and secondary schools combining multilingual education with learning and skills relevant to daily lives, such as agriculture and animal husbandry. Global
solidarity networks have enabled them to bypass state resources and educational services, following a pattern of movement activism common to other transnational advocacy networks that emerged in the 1990s (Khagram, Riker and Sikkink, 2002). The Zapatistas’ ‘pedagogical revolution’ created a new focus and momentum for social struggles across Latin America, connecting the critiques of failing state education systems and the search for alternatives to a wider set of social actors looking to education to create spaces for development alternatives, democratisation, and wider social transformation.

The Universidad de la Tierra (Earth University or Unitierra) was established by Gustavo Esteva in 1999 as part of the ‘Project for Oaxaca from Civil Society’. Its purpose was to provide a tertiary learning space, supporting and complementing existing non-formal, autonomous community education initiatives. ‘We wish to create or support autonomous ways of living, linked to the conditions and aspirations of the individuals or groups who come to us’ (Esteva, 2006b: 12). Unitierra was founded on a vision of autonomy from both the state and market, reflecting a democratic, community-centred ideal of economic, social, and cultural development. A comparable concept from post-crisis Argentina defines a process that ‘distinguishes a person or group from the state and other hierarchical institutions, and is also used to reflect self-organisation, autogestion [self-management], direct participation, and democracy’ (Sitrin, 2007: 46). Unitierra reflects a growing movement among indigenous communities to construct spaces where distinctive ethnic, cultural, and linguistic identities can be asserted. Other Unitierras have been established across Mexico. The most significant of them, the Centro Indígena de Capacitación Integral (CIDECI) in Chiapas, is discussed below.

The state of educational disadvantage and disconnect
The context for the emergence of endogenous educational alternatives was essentially one of extreme deprivation for the indigenous and campesino communities in Mexico. Former UN Special Rapporteur on the Right to Education, Katarina Tomasevski, noted that Mexico was the first country in
which the Washington Consensus was applied, prioritising debt servicing and fiscal austerity over public spending and public services. Privatisation put private schooling ‘on equal footing’ with public schools, even as the latter became increasingly impoverished (Tomasevski, 2006: 195). Recent studies by the National Council for the Evaluation of Social Development Policy in Mexico show significant correlations between poverty, rurality, indigeneity, and educational disadvantage (CONEVAL, 2011, 2008). Oaxaca, Chiapas, Guerrero, and Campeche, the states with the highest proportion of indigenous peoples, have the highest levels of combined disadvantage. In some municipalities, 95 percent of the inhabitants live in extreme poverty (CONEVAL, 2011). Chiapas and Oaxaca have the highest illiteracy rates, the lowest levels of primary school attendance, and the lowest completion rates for education at all levels (CONEVAL, 2008). A World Bank report on poverty in Mexico similarly correlates extreme poverty, low educational and development outcomes, and high proportions of indigenous population (Walton and Lopez-Acevedo, 2004: xxxvi–xxxvii).

This situation of the indigenous peoples in Mexico is far from unique, reflecting global patterns of indigenous poverty and educational disadvantage. The 2004 report by Special Rapporteur on the Rights of Indigenous, Peoples Rodolfo Stavenhagen, examined the rights to quality and culturally appropriate education, and found that inequality between indigenous and non-indigenous people is increasing. Indigenous populations are less able to access good-quality bilingual or culturally appropriate education; face racism and xenophobia in classrooms; and endure curricula that neglect indigenous cultures and reinforce negative stereotypes. The emphasis on classroom-based schooling means that learning is situated outside the community context. There is a disconnect between community-based forms of learning and the experience of education in the classroom. Schooling may also prevent indigenous children from taking part in community activities which may be linked to seasonality and livelihoods, reducing opportunities for ‘the learning and teaching that take place as part of daily life’ and that is essential to ‘engender a sense of indigenous identity based in the intellectual and cultural heritage of the people’ (Aikman 1999:
Predominant educational practices such as ‘copying … reading and memorizing texts’ differ from the experiential forms of learning found in communities – schooling imposes the ‘exact opposite of the traditional orientation of family and community socialization of the indigenous peoples based on active learning’ (Duque, 1998: 76). These factors likely contribute to a lack of successful attainment and completion of formal schooling, for indigenous children.

Across Latin America, schools have assumed the role of ‘incorporating indigenous people to “civilized” society’ by teaching almost exclusively in Spanish (ibid: 72). Where there are attempts to provide bilingual education, programmes fail to address the unequal position of dominant versus indigenous languages and cultures. Bilingual education therefore continues to epitomise ‘the socio-linguistic dynamics which grant a lower status to indigenous languages vis-a-vis the hegemonic culture’ (ibid: 74).

**Indigenous responses to ethnocide: Spaces for subversion and proposals for endogenous education**

The 1997 UNESCO-sponsored seminar in Oaxaca, ‘New perspectives on Adult Education for Indigenous Peoples’ collectively convened and formalised a global process of reflection about the negative impacts of formal state education on minority indigenous cultures. The ensuing Huaxayacac Declaration on Adult Education for Indigenous People states that ‘official education has led to one single way of conceiving education which has produced the uprooting of our people and our lands … and ignores the value of our own knowledge’ (1998: 217). The growing resistance among indigenous communities raised the possibility of endogenous education as a form of subversion and symbolic reconfiguration, resisting cultural dominance, perpetrated through formal state education and ‘embedded in systems of knowledge’ (Nandy, 2000: 115).

Esteva observes that the Zapatista uprising sparked the revitalisation of indigenous education as a concern within indigenous communities
(interview, 13 August 2011), who began to look within for the knowledge and skills needed to create sustainable alternatives to formal education. A shift occurred towards autonomous, community-centred learning, balancing the educational needs of individual learners with the social, cultural, and economic needs of the community. The concept of endogenous education has become increasingly relevant in the post-colonial and post-development context. Rejecting externally imposed models of formal schooling and enculturation (exogenous education), endogenous education seeks to be community-based, culturally rooted and autonomous. It is based upon the ‘traditional way of transmitting knowledge and of developing useful skills based on the family and community environments, whereas exogenous education is education offered through formal, non-formal and informal education services’ (Duque, 1998: 68).

Fals-Borda and Mora-Osejo challenge the Eurocentrism of the predominant Latin American educational paradigm, which serves to perpetuate North-South imbalances in knowledge, power, and wealth, keeping the global South in a position of economic, cultural, and social disadvantage, where ‘southern realities and facts may be unknown, disregarded or unilaterally exploited’ (2003: 103). Endogenous education rejects the claims of universalised knowledge that are ‘epistemologically racist’, Eurocentric, and that exclude non-Western cosmovisions (Fals-Borda and Mora-Osejo, 2003; Andreotti, 2011). Endogenous educational alternatives are instead ‘rooted in our own realities and circumstances that would contribute more effectively to our progress and development. [It] should be alternative to and more open than the dominant ones [paradigms]’ (Fals-Borda and Mora-Osejo, 2003: 104).

The ‘re-routing and re-rooting’ of education in endogenous projects of cultural-political resistance and decolonisation (see Brydon, 2010; Loomba et al., 2005; Wilson, Şandru and Welsh, 2010) is one way to understand how endogenous education fundamentally ‘cracks’ the global imaginary of education. Endogenous education re-values the specificities of multiple and diverse cultures and contexts, grounding education in local
realities, instead of a hierarchical and falsely universal globality. Confronting ‘epistemic racism’, it recovers, revalues, and regenerates local knowledge in the hope that more truly universal alternatives can emerge: ‘every scrap of local knowledge is not only a global heritage; it is an alternative form of universal knowledge’ (Nandy, 2000: 122). Endogenous education makes strong claims for cognitive justice and the localisation of universal understandings of what makes a good education (Nordtviet, 2004), but its aims are also pragmatic: ‘endogenesis of this kind should open the way for useful discoveries and initiatives that are able to alleviate social problems within the local world’ (Fals-Borda and Mora-Osejo, 2003: 104).

**Unitierra and CIDECI: an endogenous university and tertiary education centre**

Unitierra in Oaxaca is an endogenous university that distinguishes itself from state or market-driven higher education institutions, aligning instead with local communities desiring control over their education. Following the Huaxyacac Declaration, indigenous communities began to experiment with community-centred alternatives to learning (King, 1998). In extreme cases in Oaxaca, rural and urban communities expelled state-employed teachers and closed state schools, replacing them with community-based traditional knowledge and practical skills considered to be more authentically related to people’s daily lives and community well-being. The most pressing practical concerns identified by Unitierra’s director, Gustavo Esteva, were high unemployment, erosion of the social fabric, outward migration, and the failing education system.

Esteva saw formal education as being overly distanced from the everyday lives of indigenous people, failing to inculcate the skills they needed to remain as productive members of their communities. State education was failing to deliver on its promise of economic participation in the global economy, as many indigenous people could not access higher education, leaving them with the unattractive option of low-skilled, low-paid, and undignified jobs. Mainstream education has fostered the belief that economic opportunities are only available outside the community, causing
out-migration to cities and across the US border. The devaluation and neglect of indigenous knowledge means that ‘school impedes children from learning what they need, to continue living in their communities, to contribute to their common prosperity, and to that of their soils and their homes’ (Esteva, 2006b: 14).

The solution was to foster local opportunities, ‘learning first and foremost how to stay in their own regions and lead a dignified life’. Their three main criteria are to be ‘economically feasible, socially just and ecologically sensible’, so young people can become less dependent on employers or the government. Sustainable, community-based development allows young people to stay and prosper in their home communities, while communities benefit from their work and skills. The principle of dignity is core. ‘Dignity’ is understood in terms of self-reliance for individuals and communities, freedom from dependence on outside forces for livelihood, living within one’s means and in an ecologically sensible and socially just manner (Esteva, 2006b: 12-13).

For Esteva, Unitierra differs from conventional vocational training institutes, as it rejects the purpose, values, and methods of formal education. He draws on Ilich’s Deschooling Society (1971) to articulate a philosophy of autonomous, student-centred learning and reflective practice, based on a model of master-pupil relationships. Rejecting the pedagogy of the formal classroom, Unitierra assigns the responsibility for learning to individuals, under the guidance of ‘masters’ with specific skills. They wish individuals to be empowered, to regain control over their own learning, cease being passive receptacles of knowledge and actively pursue their individual learning paths. The traditionalist interest in reclaiming ‘types of apprenticeship as old as the hills’ is complemented with ‘contemporary practices to ensure shared learning and study’ (Esteva, 2006b: 13). Unitierra acts as a ‘matchmaker’, for example, matching a learner who is concerned with land rights with a practising agrarian lawyer. Other examples include urban agriculture and permaculture, sanitation, traditional healing and medicine, video and digital technology, and recycling. Unitierra tries to coordinate the interests of
individual learners, study groups, and cooperating communities’ needs. ‘Control over learning is in the hands of the person who learns… based on the[ir] interest, initiative and determination’ (Esteva, 2005: 12). The learner’s autonomy is mediated and facilitated by parents, family, and communities, with Unitierra filling any gaps identified within the learner’s immediate communities (conversation with Esteva, 13 August 2011). Practical learning and experience are informed and supplemented by research, prioritising the recovery of knowledge and practices which communities once transmitted across generations, but are under threat due to educational and societal devaluation and neglect.

The establishment of Unitierra catalysed other autonomous educational initiatives in Mexico, and Esteva acted as advisor for the establishment of CIDECI in Chiapas. Both CIDECI and Unitierra are associated with the Zapatista movement, but a larger majority of CIDECI’s students come from more activist, communities and have come up through the Zapatista system of autonomous primary and secondary schooling. CIDECI thus represents an endogenous tertiary progression route. Unitierra accepts students of any background from anywhere in Mexico or abroad, while CIDECI restricts enrolment to local indigenous communities. CIDECI’s policy reflects the Zapatista ideal of autonomy and resistance as the starting point for regenerating indigenous livelihoods and culture. CIDECI is associated with internationally networked Zapatista events, for example hosting the annual international gathering of the Festival Mundial de la Digna Rabia (Worldwide Festival of Dignified Rage) and La Escuelita Zapatista. Beginning as a commemoration of the 1994 Zapatista uprising, this expanded into workshops including participants from different social movements across the Americas, and beyond, to explore alternatives to neoliberal globalisation (Bellinghausen, 2008).

CIDECI is principally oriented towards residential training and instruction within workshop settings. This contrasts with the individual, ‘deschooled’, matchmaking strategy at Unitierra. Under the supervision of skilled craftsmen and women, CIDECI students learn artisanal or vocational
skills, including animal husbandry, horticulture, carpentry, baking, mechanics, metalwork, tailoring, and shoemaking. CIDECI’s campus aims for self-sufficiency in food and energy consumption, but also generates income from the sales of products and services from their workshops.

Both institutions have demonstrated a considerable capacity for adaptation, allowing them to stay relevant within a changing landscape of social movements. Unitierra students have gone on to create an independent Centro Autónomo para la Creación Intercultural de Tecnologías Apropiadas (CACITA [Autonomous Centre for the Intercultural Creation of Appropriate Technology]) that aims to develop and promote technologies to serve the basic needs of families and communities in Oaxaca. CACITA runs workshops, courses, and exchanges for people interested in ecological and sustainable technologies. In Chiapas, the Festival Mundial de la Digna Rabia has been replaced by an annual gathering, Seminario Internacional de Reflexion y Analysis de Tierra Planeta Movimientos Antisistemicos (International Seminar for Analysis and Reflection for the Earth, Planet, and Resistance Movements). This gathering focuses on the creation of a global space for dialogue, reflection, and sharing experiences from a diverse range of social movements (Bellinghausen, 2011). Common ground is afforded by the focus on community-level examples of resistance and sustainable development from the global South, particularly amongst peasant and indigenous communities.

Dilemmas of responsibility and respectability
Endogenous experiments involve a de facto shifting of responsibility for education away from the state and onto civil society. The communities discussed here have assumed responsibility for providing their own education at all levels. Seeking ‘to apply energy and imagination to creating a whole new world in our own places, in the present’ (Esteva and Prakash, 2008: 416), endogenous efforts provide alternatives that bypass the state, instead of pressuring it to improve and reform. This has profound implications for how we understand the role of the state, especially with regard to its obligations to
protect and fulfil the right to education according to international human rights law, norms and policies.

Ratification of the International Covenant on Economic, Social and Cultural Rights (ICESCR) obliges the Mexican state to respect, protect, and fulfil the right and accessibility to education at all levels:

“The States Parties to the present Covenant recognize the right of everyone to education. They agree that education shall be directed to the full development of the human personality and the sense of its dignity, and shall strengthen the respect for human rights and fundamental freedoms” (UN General Assembly 1966, Art. 13).

Regarding higher education, states parties must ensure that it is ‘equally accessible to all, on the basis of capacity, by every appropriate means, and in particular by the progressive introduction of free education’ (ibid). States have obligations to enact plans and implement these measures, taking steps to realise the right to education, according to their maximum available resources (UN General Assembly 1966, Art. 14). The rights-based approach to education is further founded on the principle of non-discrimination, meaning free availability and accessibility, regardless of sex, gender, religion, ethnicity, or race (UN Committee on Economic, Social and Cultural Rights [CESCR] 1999, para. 6.b.i).

Reinke (2004: 487) complains that state efforts to address the discrimination and marginalisation of indigenous peoples in education have been misguided, ad-hoc, and inadequately resourced. In 2010, the National Congress on Indigenous and Intercultural Education highlighted continuing concerns about discrimination, repeating many of the issues raised in the lead-up to the Huaxycac Declaration. This suggests that the growth of endogenous education has not prevented formal schooling from continuing to function as the principal tool for assimilating indigenous people into a homogenising and discriminatory Mexican state (López y Rivas, 2010). The 2010 National Congress indicated that more, not less, engagement and consultation was needed between indigenous communities and the state in
designing and implementing education programmes. The state retains obligations to guarantee and increase levels of school attendance and provide quality bilingual and intercultural education. If the state is to meaningfully address educational deficits within indigenous communities, it must demonstrate clear efforts to ‘remedy collective victimization’ (Tomasevski, 2006: 195).

The Mexican state’s failure to meet its international obligations has made the option of endogenous education a last resort for some communities. Paradoxically, the success of initiatives such as Unitierra and CIDECI may facilitate a further withdrawal of the state from educational provision, playing further to the neoliberal agenda to reduce state efforts in public education. When individuals and communities assume the cost and responsibility of providing education, they may run the risk of replicating certain neoliberal tenets of education, recasting their citizens as neither more nor less than consumers. Tomasevski (2006: 182) highlights this as one of the greatest impediments to the realisation of the right to education for all. Esteva is fundamentally opposed to the conception of education to primarily serve the market, not individual or collective wellbeing. Unitierra’s vision of self-sustaining communities promotes ‘steady state’ economics, rather than the continuous pursuit of economic growth. Human dignity and the freedom to lead a dignified life are core principles, an essentially communitarian, rather than individualist, statist, or consumerist worldview. The local-global orientation is understood as a worldwide network of grassroots activists, not the imposition of a market-oriented ‘global design’ on local realities (Mignolo, 2000).

Mexican society is deeply preoccupied with formal accreditation as a mark of status, and respectability and educational qualifications are important for social positioning and social mobility within a highly stratified society. A lack of formal qualifications denotes exclusion from mainstream higher education and professional life. The alternative of endogenous education is therefore risky, because exogenous qualifications matter greatly. Aware of this dilemma, Unitierra decided to award all participants a diploma,
admitting that their diplomas lacked official status, but arguing that this nevertheless helped to legitimise Unitierra’s activities in the eyes of the outside world and to protect its participants. By packaging their activities ‘under the rubric of a University’ Unitierra plays with ‘the symbols of the official system’ using ‘to our benefit all symbols that we perceive as tools of domination’ (Esteva, 2006a: 14-15). Learners and communities are knowingly complicit in this subversion, valuing the diplomas as ‘an expression of people’s autonomy’, symbolising the ‘commitment of our students to their own community, not a right to demand anything’ (Esteva, 2005: 15).

Educational horizontalism and sustainable development

Sitrin’s notion of non-hierarchical community organisation, horizontalidad (horizontality), contextualises endogenous education within a broader canvas of emerging social movements. Horizontalidad characterises the commonalities shared by myriad social movements attempting to ‘reorganise’ and ‘reshape’ lives. It signifies the creation of ‘direct democratic relationships, rejecting hierarchy…and to construct a better environment through autogestionandose (self-management) in communities, neighborhoods, work places, schools and universities’ (Sitrin, 2007: 47). The focus of social movements has shifted from global to local, as communities of students, workers, landless peasants, and indigenous peoples strive to remake their current reality and ‘create a new future within the present’ (Sitrin, 2007: 44, 47). Sitrin contends that localisation and the focus on community do not necessarily demand the sacrifice of the individual. Individual and community are seen as mutually constitutive and interdependent. The philosophy of Unitierra reflects this conception of a collectivity that values individuals, but not as free-floating, autonomous beings. ‘Real freedom’ is conceived in terms of a reciprocal relationship:

“Our ‘students’ do not belong to communities. They are their communities and have a responsibility to those communities, that is, to themselves ... [they] have the internal and social structure that is a fundamental condition for real freedom ... Real people, persons,
knots in nets of relationships, can be together by themselves, in freedom” (Esteva, 2006a: 16).

Unitierra and CIDECI illustrate the horizontal logic of Latin American social movements: revisioning the idea of development, with education acting as an enabling force to create space for a plurality of human concerns and ways of being. The focus on essential skills for individuals-within-communities allows them to survive, to challenge neoliberalism and connect with other movements. The ‘curriculum’ at Unitierra is based on the communities’ identified needs for food, adequate and sustainable sanitation, waste disposal, and access to water (interview with Esteva, 13 August 2011). ‘There is a determined effort to repair the damage inflicted by colonization, modernity, development, and globalization’. Indeed, ‘for people on the margins disengaging from the economic logic of the market or the plan has become the very condition for survival’ (Esteva, 1992: 27).

In seeking to recover and regenerate indigenous knowledge, Unitierra and CIDECI substantiate the concept of an ‘ecology of knowledges’ and an ‘alternative way of thinking about alternatives’, as advocated by de Sousa Santos (Dalea and Robertson, 2004). Endogenous tertiary education is intimately tied to the nurturance and valorisation of a plurality of knowledges and cosmovisions, as alternatives to the Eurocentric canon of the so-called ‘knowledge society’ (Dalea and Robertson, 2004: 158). This answers Fals-Borda and Mora-Osejo’s call to ‘construct more balanced, endogenous paradigms’ (2003: 104).

De Sousa Santos sees cognitive justice as dependent upon the ‘coexistence of many knowledges in the world’, given ‘the relation between the abstract hierarchies which constitute them and the unequal economic and political power relations which produce and reproduce increasingly more severe social injustice’ (2007b: xv). Chan-Tibergien similarly argues for global (educational) justice to be achieved through a combination of critical pedagogy and a fundamental critique of the cognitive injustice inherent within hegemonic neoliberal ideology. Cognitive justice involves re-
asserting value systems and restoring subjugated knowledges through alternative methodologies (2004: 191). It requires resistance and grounding in alternative epistemologies that engender ‘alternative ways of looking at alternatives’ (Andreotti, 2011: 390). Cognitive justice demands that epistemic racism be exposed, and diversity and richness in living, learning, and constructing knowledge be celebrated, validating ‘the beauty and wisdom that exist in communities and cultures which can be inspiring and mutually nurturing’. The communities involved are not only concerned to seek alternatives to schooling, they have an explicit wish to pluralise epistemologies and recover experience (Fasheh and Pimparé, 2006).

Unitierra and CIDE CI could be said to represent different localised visions of Santos’ proposal for a ‘Popular University of the Social Movements’, ‘a global university from below, indeed a counter-university aimed at bringing together activists of social movements and social scientists/artists engaged in participatory research-action’. A plurality of knowledges could aid ‘the struggle against this monoculture of knowledge’ (Dalea and Robertson, 2004: 158) in another world where local and global citizens are willing and able to participate in new forms of democratic governance, like the World Social Forum. It begins with, and is achieved through, the regeneration of education and the flourishing of alternative knowledge. Fals-Borda and Mora-Osejo call for ‘free and altruistic universities committed to … the creation, accumulation and diffusion of this knowledge committed to social progress. They should be authentically participatory’ (2003: 107).

Endogenous education remains open to, but is determined not to be dominated by, external forces. Fals-Borda and Mora-Osejo caution against isolation from outside influences: ‘one should not become xenophobic nor should we isolate ourselves from the general intellectual world … [W]e should comply with the need to accumulate diverse patterns of thought and action congruent with our specific modalities of growth and progress’ (2003: 106). The aim is not to return to ‘colonial forms of bush gathering and the export of tropical products’, but to ‘facilitate a rational use of land, water,
wind, and solar resources, as well as introducing more constructive and productive methods of territorial occupancy and use’ (ibid: 107). It requires an awareness of modern technological advances and the need for interdependence in the ever-globalising world. Reinke (2004: 489) shows that indigenous communities are not averse to modern technology: ‘the Zapotecos [one of Oaxaca’s main indigenous groups] believe it is possible to fuse the traditional with the modern, taking advantage of new technology in order to maintain and recognise the value of their traditional way of life and resist assimilation’.

Endogenous education can stimulate an often-necessary internal dialogue within the community. An uncritical approach to community and traditions poses the danger of retaining, even encouraging, persistently unequal relations, such as gender or racial discrimination or violence within and between indigenous communities. Unitierra and CIDECI try to address these issues and challenge destructive social norms through processes of dialogue. Challenging community norms is a gradual process that should develop organically from within the community, rather than be externally imposed (conversation with Esteva, 13 August 2011).

**Conclusion: possibilities for survival and interdependence**

Unitierra and CIDECI do not just provide another form of development education; rather, through the autonomous regeneration of education at community level, they are using education as a space for re-defining development and shifting the power balances of globalisation as we know it. This model of 'development education' can be seen as an enabling space for a plurality of human concerns and ways of being. The Zapatistas maintain that their movement is not a prescription for global transformation, but one possibility out of infinite possibilities for transforming our present reality. Unitierra and CIDECI operate in the context of a deeply divided society where discrimination of the indigenous population is a routine, and often institutionalised reality. Its alternative philosophy of knowledge is means for both survival and interdependence, though survival is no small concern in situations where the state has failed to provide basic social services.
Endogenous educational spaces represent profound attempts to question the content, purpose, and values of education. They are radically different from exogenous, globalising educational discourses that can be found in the ‘Education for All’ or the ‘Millennium Development Goals’ initiatives. Those policy models are primarily concerned with implementing a version of education and development whose superiority over other forms of education remains unquestioned. The envisaged result involves the conversion of local people into a perhaps falsely universal ‘global’ education, where progress claims to be measured in terms of wealth, happiness, and cultivation (Nordtveit, 2009), but is actually an imposition of ‘global designs’ on ‘local realities’ (Mignolo, 2000).

The significance of endogenous education lies in the efforts to create and strengthen collectivities, democratise educational, political and social relationships and deliberately shift from hierarchical to horizontal forms of learning and organisation. This is a growing trend across the world, as a diversity of peoples and communities adopt alternative forms of organisation and look for autonomous solutions where states have failed. The protagonists are as diverse as the means employed to achieve this, but all share a common goal of re-examining ‘local democracy and the possibility of variation within national states based on the recuperation of participatory traditions that had been suppressed in the process of constructing homogenous national identities’ (Santos and Avritzer, 2008: xxxvii).

Andreotti (2011: 393) poses the question of how to support ‘learners in the difficult stages of this undoing when they face the uncertainty, fear, anger and possible paralysis that comes in the early stages of the renegotiation of (and of disenchantment with) epistemic privilege?’ Esteva attempts an answer by reminding us that Unitierra was not actually needed to create the alternatives, since the alternatives were already in existence. What endogenous alternatives can do is to facilitate authentic and critical dialogue between individuals and communities, nurture alternative ecologies of knowledge, and keep inclusive and democratic processes of transformation on our horizons.
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YASUNI-ITT AND POST-OIL DEVELOPMENT: LESSONS FOR DEVELOPMENT EDUCATORS

Chris O’Connell

“The struggle does not stop when the revolution is in power. It starts a new kind of struggle, new kind of fighting that all societies knew and are knowing. Then the role of education changes also” Paulo Freire (Horton et al. 1990: 218).

Abstract: The election of a series of leftist presidents across Latin America brought hope of alternative models of development, and a greater say for civil society organisations. Instead social actors have been marginalised – even criminalised – by ‘progressive’ governments that have continued to rely on extractive industries to fund social programmes. Ecuador’s Yasuní-ITT, which emerged from civil society, was seen as a possible model of ‘post-oil’ development. Adopted by the government of President Correa, its cancellation resulted in strong opposition from a new social actor: urban young people, styling themselves Yasunídos (United for Yasuní). This article contends that this surprising outcome can only be understood by reference to the development education (DE) programme organised by environmental non-governmental organisations (NGOs). The case of Yasunídos demonstrates the potential for using Freirean pedagogy to construct civil society responses to this new context.

Key words: Civil society; New Left; Ecuador; post-neoliberal; post-oil; development; education.

Latin America has been described as the only region of the world where a ‘fundamental change’ of development model is occurring (Kirby, 2012: 27). This change comes after two decades of upheaval in the region’s economy, polity and society. The widespread introduction of neoliberal economic policies during the 1990s heralded an attempt to create what Silva has termed a ‘market society’. These efforts, however, were met with a
countermovement: sustained resistance from civil society. This sector, led by social and indigenous movements, has formulated alternatives to the neoliberal model, ousted sitting presidents, and ‘ushered in governments inclined to act on mandates’ to tackle neoliberalism (2009: 53). Kirby has contended that education, and in particular the work of Paulo Freire, played a key role in this process of transformative change (2012).

The ‘New Left’ governments that rose to power in many countries offered the promise of an alternative path, together with closer relations between civil society and the state. Variously described as ‘radical’ (Ellner, 2012; Raby, 2006) and ‘populist’ (de la Torre & Aronson, 2013; Weyland, 2013), the presidents of Venezuela, Ecuador and Bolivia have tended to style themselves as the leaders of a revolution, albeit of a democratic variety (Becker, 2011; Cannon, 2009). Presidents Hugo Chávez, Evo Morales and Rafael Correa have overhauled the institutional frameworks of their countries, and wholly altered the power dynamics (Ellner, 2012). In a region with serious and long-standing social issues, these governments have achieved ‘remarkable’ progress in increasing social spending and reducing poverty and inequality (Hogenboom, 2012).

As the dust settles, however, some have begun to question whether these ‘progressive’ governments are formulating alternative models of development (Muñoz Cabrera, 2012; Weyland et al., 2010). In particular, critics point to the continued dependence on extractive activities like oil, gas and mining as evidence of continuity rather than change (Gudynas, 2012; Hogenboom, 2012). Accompanying this trend has been a steady deterioration in relations between the state and civil society, which has been portrayed as an obstacle to development (Gudynas, 2012: 403). Furthermore, governments have enacted laws that limit the scope for contentious action. Faced with this ‘totally new context’ (ibid), civil society actors have been forced to seek alternative approaches. A key component of the reaction by civil society, this article contends, has been education.
This article considers the case of an alternative model of development that has emerged from this context. Ecuador’s ‘ground-breaking’ Yasuní-ITT scheme (Pellegrini et al., 2014: 284) has been called a model of ‘post-oil development’ (Acosta et al., 2009). This initiative originated in civil society and ‘activist organisations’ (Bebbington, 2012: 23), and proposed leaving oil underground in return for contributions from the international community. The scheme was adopted by the ‘leftist’ Correa government in 2007, garnering international attention (Larrea & Warnars, 2009). Reaction to the scheme within Ecuador, however, was ‘lukewarm’ (Acosta et al., 2009). Nevertheless, when Correa moved to cancel the project in 2013 following several setbacks, the response from local civil society was unexpectedly fierce, yielding widespread protest and calls for a referendum (Coryat, 2015). At the forefront of the resistance was a new generation of activists styling themselves Yasunídos (United for Yasuní).

The Yasuní-ITT Initiative presents an excellent case study for educators seeking to understand challenges to new models of development. This paper begins with an overview of the ‘New Left’ in Latin America and its relations with civil society. The second part looks at the Yasuní-ITT Initiative, its origins, promise, and failure. The third part presents a study of development in the global South, reviewing a schools’ programme which sought to engage citizens on the issue. That section goes on to consider one outcome of the programme: the Yasunídos collective. The article contends that given the complex balance of forces in many countries, Freirean critical pedagogy is fundamental to the survival of social movements and, consequently, for the generation of new paradigms of development. As Martinez notes, these are the sectors of society that have traditionally ‘offered alternative and sustainable economic models and practices’ (2014: 140).

The ‘New Left’ and civil society: Creating a new model?
The debt crisis that engulfed Latin America in the 1980s led to the ‘lost development decade’ (Kirby, 2003: 53). The cure prescribed by international financial institutions like the World Bank and International Monetary Fund (IMF) – neoliberal economic policies – while bringing stability, had
significant side-effects. Critical problems like hyperinflation were controlled, and credit lines were re-opened. Nevertheless, the more ambitious promises of neoliberalism – increased foreign investment, growth of local business, higher employment – failed to materialise (Green, 2003; Kirby, 2003). The privatisation of state assets led to more corruption (Stiglitz, 2003), and reduced the state’s capacity for redistribution (Roxborough, 1992). The outcome was an increase in poverty and stratification, leading the UN’s Development Programme to describe Latin America as the most unequal region in the world (2004: 43).

In socio-political terms, the effects were equally grave. Along with ‘downsizing’ the state, neoliberalism deregulated industry and flexibilised labour, which decimated the union movement (Green, 2003), and ‘shredded the bonds’ between traditional parties and voters (Roberts, 2003: 39). The result was widespread disaffection with democracy across the region (Mainwaring et al., 2006). As Silva has noted, neoliberalism was experienced by the urban and rural poor, indigenous people and elements of the middle class as ‘economic, political, and social exclusion and injustice’ (2009: 266). Nevertheless, the roll-out of neoliberal reforms across the region was incomplete (Walton, 2004), due to resistance from an unexpected source. The rise of social and indigenous movements resulted in struggles against the imposition of these policies (Silva, 2009; Wolff, 2007).

During the late 1990s and the early 2000s, these movements gradually identified the neoliberal agenda as the common source of their problems (Silva, 2009). According to Kirby, the influence of Freirean pedagogy is fundamental to understanding how movements were able to articulate and frame their issues without any ‘pre-set blueprint’ (2012: 28). This level of consciousness enabled social actors to find innovative responses to threats, and to pursue transformative change. As Philip and Panizza (2011: 50) have noted, these struggles were never purely economic in nature but sought more fundamental reform, often bringing down governments in the process (Hochstetler, 2006). The outcome of this turmoil was the election of a series of presidents who committed themselves to sweeping
reforms; to ‘post-neoliberal’ development (Kirby & Cannon, 2012: 8). Among those taking power via this process were Hugo Chávez, Evo Morales and Rafael Correa.

The years that followed were equally dramatic, with these leaders overseeing significant institutional reform, typically including a new constitution to ‘re-found’ the state (Lomnitz, 2006). In spite of these achievements, however, the debate continues as to whether these ‘progressive’ regimes have replaced the neoliberal development model. Some have classified these governments as examples of the ‘petro-left’ (Schamis, 2006), or ‘rentier populism’ (Mazzuca, 2013). This argument suggests that the commodities boom of the last decade allowed these presidents to purchase electoral support through redistributive policies (Schamis, 2006). Thus rather than representing a new model, these governments have simply revived the ‘traditional rentier model’ (Weyland, 2009: 146). Others have pointed to the prioritisation of marginalised sectors (Ellner, 2012), and to significant reductions in poverty and inequality (Hogenboom, 2012) as signs of real change. For some, however, this merely amounts to an improvement on the existing model (Gudynas, 2012).

Although disagreements remain, there is consensus on some features of the ‘New Left’. Firstly, there is agreement regarding the renewed importance of the state as a central actor in both society and the economy (Roberts, 2013). While the commodities boom may not account entirely for the ‘left turn’, it has allowed countries with oil and gas reserves to assert the state’s role as the regulator of economic activity (Muñoz Cabrera, 2012: 67). The governments of Venezuela, Bolivia and Ecuador have aggressively renegotiated contracts with international companies, yielding improved terms for the state (Lievesley, 2009). This income has helped fund overdue investment in infrastructure, increased spending on health and education, and measures to address the chronic poverty that is a historic problem in these nations (ECLAC, 2013). Nevertheless, questions remain as to whether these positive changes constitute a transformation of the economic model (Kirby and Cannon, 2012).
A second element of consensus in the literature is the influence of civil society. It is widely believed that mass protests against neoliberalism facilitated the rise to power of the ‘New Left’ (Silva, 2009; Lievesley, 2009). As Kirby and Cannon have outlined, civil society activism ‘generated a discourse critical of the neoliberal project, built movements to challenge it, and provided many of the leading figures that were to win state power’ (2012: 13). Furthermore, social actors are behind many of the new models that have emerged from these leftist projects – the ‘seeds of alternative development’ (Gudynas, 2012: 407). A prominent example is the Buen Vivir (good living) paradigm, also known as sumak kawsay. This concept, now enshrined in the new constitutions of Ecuador and Bolivia, is ‘rooted in indigenous epistemology’ and advocates a fundamental change in the relationship between humans and nature (Muñoz Cabrera, 2012: 67).

The coming together of these two forces – a renovated state apparatus with a powerful civil society – has become the focus of attention for many studying the region (Cannon & Kirby, 2012; de la Torre & Ortiz, 2015). Some have noted ‘the importance of mobilised citizenry’ (Kirby, 2012: 27) in shaping policy outcomes and development models. As Philip and Panizza note, civil society has become ‘the new moderating power of Latin America politics’ (2011: 41). However, as is becoming increasingly clear, democratically elected governments with mandates for radical change do not necessarily take kindly to such moderation. According to Lievesley, governments typically try to ‘control and fragment’ these forces, and to limit their behaviour and impact (2009: 34). As might be expected in countries rich in natural resources, this tension manifests most clearly in the trade-offs between the economy and the environment (Kirby, 2012: 29).

The next section will consider one of these countries: Ecuador. Specifically, it will examine an alternative model of development that emerged from civil society. The Yasuní-ITT Initiative was an attempt to side-step the historical tension between development and conservation by monetising the preservation of an area of highly diverse rainforest (Larrea and Warnars, 2009). The initiative was adopted, promoted but ultimately
abandoned by the state amid political acrimony. The Yasuní project is a useful lens through which to examine relations between civil society and the state, and the challenges to realising innovative development models in the face of social, political and economic pressures. This case also gives insight into the new context for social actors in countries ruled by ‘leftist’ governments, and highlights the dynamic role that education plays in shaping their response.

**Monetising the Amazon: The Yasuní-ITT Initiative**

Ecuador presents an excellent case for studying the dynamics of ‘New Left’ governments, mobilised civil society, and alternative development models. During the neoliberal period, attempts to advance economic reforms were met with sustained resistance by civil society (Silva, 2009). This era of contention resulted in the ousting of three sitting presidents in a ten-year period (Hochstetler, 2006), and interrupted the reform process. At the forefront of this resistance was the indigenous movement which through innovative forms of peaceful protest built up legitimacy and forced concessions (Zamosc, 2007). Other movements played roles in these struggles, however: labour unions, neighbourhood committees, and sectors of the middle class (Silva, 2009), along with an atypically influential environmental lobby (Andrade, 2015).

These actors played a significant role in propelling left-wing economist Rafael Correa to the presidency in 2006. While Correa was an outsider, many of his chief advisors had ties to civil society. Thus the first plan for government produced by Alianza PAIS, Correa’s nascent political party, effectively compiled historic demands that had emerged from civil society (2006). Furthermore, movements and NGOs had a leading role in shaping Ecuador’s ‘progressive’ new constitution (Becker, 2011). This new document enshrined the concept of *Buen Vivir*, granted rights to nature, and recognised indigenous identity but not all concessions to civil society were of a symbolic nature. The new government imposed higher taxes on oil companies, trebled spending on education and health, and granted amnesty to several hundred imprisoned movement leaders.
Unsurprisingly, then, many civil society actors felt that this was an administration with which they could work. Nevertheless, to truly make good on what it termed its ‘Citizens’ Revolution’, the government needed to ‘move beyond rhetoric and vague platitudes to a pursuit of alternative development models’ (Becker, 2011: 109). Evidence that this could happen came from the government’s support for a radical proposal for ‘post-oil development’ (Acosta et al., 2009). This would involve embracing ‘revolutionary ideas’ and ‘imaginative financing mechanisms’ to transition from extraction to a more sustainable economy. The foundations for the Yasuní-ITT Initiative were laid by civil society organisations Acción Ecológica and Oil Watch (Rival, 2012). As Oil Watch coordinator Esperanza Martinez explained in an interview on 15 July 2015, the initiative began as a moratorium on oil exploration in Ecuador’s southern Amazon. While this approach was included in the plan for government (APAIS, 2006: 47), it was opposed by Correa. Instead the proposal was limited to three oil fields in Yasuní National Park.

Despite the more modest scale, the Yasuní-ITT Initiative put forward by Minister for Mines and Energy, Alberto Acosta, and adopted by the government in 2007, was considered a challenge to the ‘logic of extractive development’ that underpinned neoliberalism (Acosta et al., 2009). Furthermore, Yasuní National Park could be seen as the ideal ‘test case’ for such a scheme. Firstly, the park houses extraordinary biodiversity, including hundreds of species of bird, mammal and insect; the park was declared a World Biosphere Reserve by UNESCO in 1989. Secondly, the park’s territory is home to several ‘uncontacted’ tribes of the indigenous Huaorani nation that have withdrawn deep into the rainforest, and whose survival could be threatened by oil exploration. Finally, it has oil reserves. According to expert reports, approximately 846 million barrels of heavy crude could be extracted from beneath the Ishpingo, Tambococha and Tiputini (ITT) fields.

The plan as originally conceived was reasonably straightforward. The value to the Ecuadorian state of the oil in ITT was estimated to be US$7.2 billion over a thirteen year period (Pellegrini et al., 2015). In return
for contributions totalling half that figure (US$3.6 billion) by international donors, Ecuador would leave the oil under the ground. Not only would this aid the preservation of the park’s human inhabitants and biodiversity, proponents in both government and civil society were keen to point out the wider global benefits. In a general sense, the scheme would save the region from the deforestation that tends to accompany oil activity. More specifically, supporters of the initiative estimated that by not burning this oil, emissions up to 407 million metric tonnes of carbon dioxide would be avoided (Acosta et al., 2009).

Given the context of global climate change, the scheme was promoted as a new method of preventing greenhouse gas emissions (Larrea & Warnars, 2009). In presenting the initiative to the UN General Assembly in September 2007 President Correa’s speech framed the issue as one of climate justice, stating that Ecuador was seeking joint responsibility rather than charity. The proposal was well-received internationally, with figures such as Muhammad Yunus, Rigoberta Menchu and Prince Charles providing endorsements. By 2008, the German Bundestag had voted to pledge US$50 million per annum to a trust fund yet to be created (Rival, 2012). The Yasuní-ITT initiative appeared to have potential to be a new model of development for Ecuador, Latin America and the world.

Along with an alternative model of environmental protection, Yasuní-ITT offered the possibility of a new way of tackling development issues at a national level, combining the strengths of civil society and the state. As Rival has noted, the advent of ‘New Left’ governments offered the hope that social movement and state actors would come together ‘to rethink economy, ecology and political commitment’ and balance the needs of humans and nature (2012: 153). For example, while some civil society members were uncomfortable with the monetisation of the Amazon, it was clear from his inauguration speech in January 2007 that this element appealed to Correa, a trained economist. The innovation of Yasuní Security Certificates (YSCs) – effectively government bonds – as a means of securing
donations offered a possible way to keep both environmentalists and economists happy.

In spite of its apparent promise, as years passed the optimism surrounding the Yasuní-ITT initiative began to fade, and harsh realities intruded. On the global stage, the scheme hit problems during COP 15 in 2009, when YSCs were deemed ineligible for the United Nations’ reforestation strategy (REDD) – emblematic of the gap between global North and South at that time (Rival, 2012: 164). Furthermore, in 2010 difficulties arose between international donors and the Ecuadorian government over the governance structure of the trust fund. Interpreting attempts to limit the use of pledged funds as an attack on national sovereignty, Correa announced that donors could ‘stick their pennies in their ears’ (Coffey, 2013). Perhaps as a result of these issues, the level of international donor pledges fell far short of expectations (Pellegrini et al., 2014).

Nevertheless, even in the face of international apathy, some have argued that the Ecuadorian government could have – and indeed should have, in light of its constitution – made good on its plan to leave the oil in the ground (Acosta et al., 2009). In that sense, it is arguable that the biggest threat to the initiative came from within the government itself. For some in civil society, there were many reasons to doubt the government’s commitment to the scheme, particularly given Ecuador’s growing debt to oil-hungry China (Martinez, 2014). More generally, many felt that the government’s ideology was amorphous, and that ‘pressure from below and to the left’ was needed to ensure promises were honoured (Becker, 2011: 113). The capacity of civil society to maintain that pressure, however, came under threat as the government moved to control the ‘political space’ occupied by movements, and deter opposition.

Chief among the measures introduced were Executive Decree 16, which gave the state significant control over social organisations (de la Torre & Ortiz, 2015); and a new Penal Code, which decreed many methods of
protest acts of terrorism (Coryat, 2015). A report by Amnesty International (2012) estimated that 200 leaders of social movements faced terrorism charges. Other measures involved co-optation, creation of parallel organisations, and closure, as in the case of Pachamama Alliance (de la Torre & Ortiz, 2015). Along with these overt legal measures, the president’s discourse toward civil society turned increasingly hostile. Correa used speeches and his Saturday morning television show, *Enlace Ciudadano* (Citizens’ Connection), to deride the ‘infantile left, environmentalists, and Indianists’ (ibid: 9), who were portrayed as greedy special interest groups holding back national progress.

Correa was re-elected in February 2013 with a large majority, strengthening his claim to democratic legitimacy. On 15 August 2013 Correa announced the formal cancellation of the Yasuní-ITT Initiative. The move was justified using discourse resonant of what Gudynas has termed ‘new extractivism’ (2012). The president committed to using ‘cutting edge’ technology to minimise environmental damage; and to directing revenues from the oil extracted to combat poverty. ‘We cannot be beggars sitting on a sack of gold’, Correa maintained. Given the fragility of both organised political opposition and civil society, Correa might have expected the strongest criticism to come from abroad. He was wrong. The day after the announcement, protests broke out; the following day *Yasunídos* was formed. The next section will consider the emergence and impact of this key social actor and the role that development education played in its formation.

**The response of civil society: education and action**

The emergence of *Yasunídos* was described by political scientist Pablo Andrade in an interview on 16 July 2015 as the ‘rebirth’ of a civil society in Ecuador. For Esperanza Martinez, *Yasunídos* restored her faith in the possibility of a mobilised citizenry. While the long-term effect of this group remains unclear, these statements by experienced observers of state/civil society dynamics give a clear sense of its impact. Yet the emergence and significance of the group is puzzling on a number of levels. Firstly, there is the context of a fragmented civil society, along with the high rates of public
approval enjoyed by Correa. Secondly, a mere four years earlier it appeared that the Yasuní-ITT initiative had failed to capture the national imagination. Finally, there was the make-up of the organisation, which was ‘youth-led’ and independent of parties or indigenous movements (Coryat, 2015: 3747).

What could explain the emergence and subsequent impact of this *sui generis* social movement? Coryat has proposed two explanations of the level of citizen resistance to the cancellation of the project, which included protests and the formation of *Yasunídos* (2015). First there is the influence of social movement struggles over neoliberalism and the protection of the environment. Secondly, and somewhat ironically, is the impact of the government’s own marketing strategy promoting Yasuní-ITT. This multi-million dollar international campaign presented stunning images of the park’s natural wonders and ‘fostered pride and ecological consciousness’ among ordinary Ecuadorians (ibid: 3746). While these factors go some way to explaining a general public backlash, they do not provide a full account of the *Yasunídos* phenomenon. In particular, they fail to explain the fact that the collective was predominantly conformed by young city-dwellers.

At interview Esperanza Martínez explained that many believed it would be necessary to push the government to fulfil its commitment to leaving the oil in the ground, and that efforts to exert pressure hinged on an aware and engaged population. Returning to Freire’s work, and specifically to Kirby’s (2012: 28) evaluation of its influence on Latin American civil society, it has been asserted that a precondition for the emergence of movements is an ‘empowered and socially aware consciousness’. Where was this consciousness sown in the case of *Yasunídos*? How was it that a significant sector of urban youth came to know and care so much about a distant area of rainforest? It is contended that the answer lies in development education, and in particular a schools’ programme provided by environmental organisations Oil Watch and *Acción Ecológica* (Ecological Action).
Prior to continuing, this article will defend the assertion above that the programme can validly be considered ‘development education’. While the term is not common in Latin America, the influence of Freire on civil society is considerable. Particularly relevant is Freire’s concept of ‘praxis’, defined as ‘reflection and action upon the world in order to transform it’ (2000: 51). As McCloskey (2015) has asserted, the influence of Freire on DE is strong in terms of both aims and approach. Additionally, in comparing the practice of DE in the global North and South, Liddy (2013: 39-40) has found many similarities. Certainly common conceptions of DE in a Northern context would appear relevant also to the Latin American context. For example, IDEA (2012) has stated that DE uses ‘participatory and democratic learning methods’ to provide learners with a ‘critical understanding of our complex world’. McCloskey (2009: 2) has noted that DE ‘aims to result in informed local action based on a global consciousness’.

On this basis, it is contended that the DE label is correctly applied to the Mi Futuro Yasuní (My Future Yasuní) educational programme. As set out by Martinez in interview, a key objective was to promote critical understanding not only of the initiative, but of wider issues like indigenous rights and environmental destruction. Local themes were framed in a global context, citing climate change and international human rights. The stated aim was to generate public debate with a view to action. For example, the ‘script’ used for workshops identified action outcomes, one of which was ‘pressurising the state’. The approach used was participatory and utilised a range of techniques and resources. Finally, although explicitly linked to a campaign, the programme promoted reflection, thus transcending the category of what Freire has termed pure activism (2000). This section will continue with an outline of the schools’ programme; and an account of the emergence, impact and legacy of the Yasunídos movement it helped create.

**Education: Mi Futuro Yasuní Programme**

According to Martinez, the decision to enter the educational space was born more out of necessity than choice. The prior experience of Oil Watch in campaigning against extraction had relied on working with the local
population. In the case of Yasuní, however, the population was sparse and some of those living there were not contactable. A further problem was the low level of public awareness of the park: according to Martinez, an opinion poll in 2007 revealed that only 10 percent of the population had heard of Yasuní. Accordingly an education campaign was launched in 2007, to coincide with the adoption by the government of the Yasuní-ITT Initiative. By the time President Correa announced its cancellation, the programme had run for over six years. Its success in engaging the population, and in particular youth, on the issue would then face its ultimate test.

The schools’ programme was devised by Oil Watch and run by Acción Ecológica, and targeted both primary and secondary levels. The scale and ambition of the programme were initially modest, beginning in just two schools with the aim of generating general debate. However, as more schools joined, the scope of the programme developed toward specific action outcomes. Martinez stated that a further objective of working with students was to use them as a means of raising consciousness among their parents. The starting point for the programme was Yasuní’s status as a national park, and in particular its vast biodiversity. The objective was to engender a sense of national pride in Ecuador’s natural riches, to see that ‘nature belongs to everyone’ (echoing the government’s own slogan, ‘the homeland now belongs to everyone’). The overarching approach as inspired by the natural environment was positive and fun, said Martinez.

The programme provided workshops to students during school hours. Courses typically lasted five weeks, with each workshop taking around 90 minutes. The approach was explicitly participative and dynamic, featuring activities tailored to the participants’ age range. The materials featured many visual aids, in particular depicting natural wonders, but also positive images of indigenous people. For younger participants, resources focussed on environmental protection and the harmful impacts of oil exploitation. A campaign was developed featuring a piggy bank into which children were encouraged to deposit coins to help save Yasuní, while role plays centred on building a bond between participants and the ecosystem.
Events were organised to honour ‘child ecologists’, which received coverage in popular children’s magazines. For Martinez the most satisfying activities were those partnering older and younger participants.

For adolescents, the workshops feature more explicitly political elements. Concepts from the constitution, such as *Buen Vivir*, the rights of nature, and protected areas, were introduced. Indigenous culture was discussed, but also international instruments for the protection of their rights. Emphasis was placed on the impact of extraction on both humans and nature, which were related to global climate change and calls for a new model of development. Workshops encouraged participants to reflect on action outcomes within both the local and global context. For example, a role play activity included an exercise where those representing civil society were encouraged to arrange a ‘popular consultation’ over the Yasuní-ITT question, a reference to an article of the constitution that allowed citizens to convolve a recall referendum on any national issue. This provision was to become a central feature of the *Yasunídos* campaign.

Not every aspect of the educational programme was successful, Martinez admitted. By way of an example, she referred to a mobile phone application called ‘The Age of Yasuní’ which featured a children’s game which aimed to prevent an oil well being drilled. Martinez admitted that the game was ‘repetitive’ and that the application had not achieved much, but she noted that it was an attempt to find new ways to reach young people. The programme effectively came to an end upon the cancellation of Yasuní-ITT in 2013. Survey data from polling agency CEDATOS carried out at that time revealed that awareness of Yasuní-ITT in Ecuador had increased to over 80 percent, while rates of approval were well over 70 percent. While Martinez acknowledged that the state marketing campaign had been significant, she believed the programme had played a role. The real test of the programme’s success, however, would be measured by actions.
Action: Yasunídos
As noted, the Yasunídos collective did not grow out of a pre-existing political or social movement (Coryat, 2015: 3747). Nor were the members of this organisation drawn from marginalised sectors of the population with a history of spontaneous protest. Although Yasunídos’ webpage asserts the heterogeneous nature of the collective, stating, ‘we are students, peasants, artists, workers, mothers, fathers, children, activists, the group was made up mainly of ‘urban young people’ (Coryat, 2015: 3746). The organisation sprung up apparently fully formed just three days after the cancellation of Yasuní-ITT; within months they would be referred to as a ‘key social actor’. This outcome can only be understood by reference to praxis: during the programme these young people had reflected; they were now ready for action.

The effects of the education programme can also be observed in the methods Yasunídos employed to campaign against the termination of the initiative. The first phase, in the immediate aftermath of Correa’s announcement, involved widespread protests involving many actors. Police reacted aggressively to the protests, while Correa used the media to single out and demean individual protesters. As a combination of repression and fatigue took their toll on protesters, Yasunídos began to harness more innovative tools to keep the issue in the public eye. The group revived the Andean tradition of the zapateada, cultural events featuring music, dance and song (ibid). Yasunídos also drew on modern technology, disseminating videos, music and images via their website and social media. The collective also forged alliances with indigenous communities resistant to drilling.

Nevertheless, it was the decision to seek a recall referendum on the issue of Yasuní-ITT, and the campaign that followed, that sealed the importance of Yasunídos as a social force. Article 104 of the constitution allowed for the convocation of a consulta popular (recall referendum) by the citizenry on an issue of national importance, provided they could produce a petition supported by five percent of the electorate. In the case of Yasuní, this amounted to 583,324 signatures. Martinez described the process of
collecting signatures, mainly conducted on the streets, as ‘very difficult’. Nevertheless the process revealed more evidence of the influence of education. Martinez recalls witnessing children who learned about the scheme persuading fearful parents to sign. Elsewhere Coryat (2015: 3752) has noted the desire of *Yasunídos* to not only collect signatures, but to engage in dialogue with citizens about the issue.

With around three months remaining before the deadline for signature collection, *Yasunídos* held a press conference to reveal that 90 percent of the required signatures had been collected. According to Martinez, ‘that was when the war began’. The government reacted to the announcement with a forceful campaign, that including media attacks, trolling on social media, intimidation by security forces, and the launch of a parallel consultation designed to sow confusion (Coryat, 2015). The tactics did not succeed. *Yasunídos* exceeded all expectations by gathering 757,623 signatures, which were presented to the National Electoral Council (CNE). This was not the end of the matter, however; amid accusations of fraud, the CNE disqualified over 60 percent of the signatures, ensuring that the referendum would not proceed.

While *Yasunídos* may have lost the battle over the recall referendum, it is not yet clear who will win this ‘war’. The government was also damaged by the affair. Local elections in early 2014 saw the government lose all of the major cities, an outcome attributed by both Martinez and Coryat (2015) to a public distaste for the treatment of *Yasunídos*. Following that period there has also been a resurgence in civil society mobilisation in Ecuador, including the re-emergence of the indigenous movement (Becker, 2015). While *Yasunídos* have faded somewhat from view, their influence continues. Although the government amended the wording of Article 104 of the constitution to prevent further citizens’ referenda, there has been an upsurge in ‘alternative’ consultations among communities threatened by oil or mining. As Martinez stated, ‘I believe *Yasunídos* did this’.
Furthermore, this case is not unique; other organisations in Ecuador are also turning to Freirean pedagogy in response to the challenging contemporary environment. For example, FECAOL is a federation of small farmers on Ecuador’s coastal plain, a region not renowned for social movements. This helps to explain the foundation of a School of Agroecological Formation. Richard Intriago, one of the organisation’s leaders, explained in an interview on 12 July 2015 that the school was created to strengthen the organisation, promote agroecology, and form leaders with a ‘critical vision’. The school draws inspiration from the ‘Paulo Freire’ Latin American Institute of Agroecology set up by Via Campesina and Brazil’s Landless Workers’ Movement (MST). The curriculum promotes active participation based on reflection and commitment to the construction of a society based on justice and solidarity. As Intriago explained, ‘first we need to build our capacity; then we will be ready for action when the time comes for change’.

Conclusion
The ascension to power of governments of the ‘New Left’ has proved a double-edged sword for civil society in parts of Latin America. While these organisations have seen many historic proposals accepted and even enshrined in constitutions, they have also been pushed to the political fringes. Furthermore, social actors that have in the past been the authors of alternative models of development are increasingly sceptical of the path taken by ‘progressive’ governments. Nowhere is this tension more apparent than in the area of resource extraction, upon which the economies of countries like Venezuela, Bolivia and Ecuador depend. Attempts to use traditional methods developed during the neoliberal era to put pressure on governments have yielded diminishing returns due to legal and discursive moves to criminalise and delegitimise protest.

The case study of the Yasuní-ITT Initiative and its failure serves to highlight this dynamic. However, as the article also demonstrates, civil society is continuing to innovate in response to this changed context. In particular, social actors are turning increasingly to the spirit and techniques
of Freirean education in order to reflect on the current reality with a view to fresh action outcomes. As the study of the *Mi Futuro Yasuní* schools’ programme, and its influence on the emergence of the *Yasunídos* collective has demonstrated, not all avenues for action have been closed. It is clear that civil society actors in Latin America will continue to be the agents of their own transformation. It is for this reason that those who work with and are inspired by the region do not talk about ‘charity’, but about ‘solidarity’.

References


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PARTICIPATORY ACTION RESEARCH (PAR) AND THE COLOMBIAN PEASANT RESERVE ZONES: THE LEGACY OF ORLANDO FALS BORDA

José Gutiérrez

Abstract: Fals Borda was a Colombian intellectual who became well known for helping give shape to the Participatory Action Research (PAR) approach in social sciences, a process which emphasises a dialogical, self-reflective and participatory approach to knowledge which rejects the neat hierarchical distinction between the researcher and researched with the explicit purpose of empowering the oppressed and helping them to overcome their oppression. While most of South America has moved away from the ‘Washington Consensus’ over the last twenty years, Colombia has remained a conservative country and a staunch defender of the neoliberal creed. However, the peasantry has become the main actor of an important process of transformation, a central element of which are the Peasant Reserve Zones (ZRC). In the process of researching to implement these, researchers working with the agrarian unions and communities in the Cauca Valley have come to use participatory methodologies which demonstrate the contemporary relevance of PAR.

Key words: Colombia; Cauca Valley; Participatory Action Research; rural development; community activism; participative learning; Peasant Reserve Zones.

When the Colombian sociologist Orlando Fals Borda passed away in 2008, an editorial from one of Colombia’s leading newspapers, El Espectador (13 August 2008), drew attention to the fact that he was one of the few intellectuals who remained committed to that country’s oppressed groups throughout his career and that this commitment only grew deeper as time passed. As the newspaper aptly suggested, the older Fals Borda got, the more radicalised he became.
Orlando Fals Borda was born in the Caribbean city of Barranquilla in 1925 and was to leave a deep mark in social sciences both in Colombia and around the world. In Colombia, he was one of the founders of the first Latin American School of Sociology in the National University (Universidad Nacional) in 1959. Another founder, the priest Camilo Torres, would later die in the ranks of the National Liberation Army (Ejército de Liberación Nacional, ELN) guerrillas shortly after joining them in 1966. Fals Borda was one of the first social scientists to systematically study the phenomenon of violence in Colombia (together with Germán Guzmán Campos and Eduardo Umaña Luna they published *La Violencia en Colombia* in 1962). He was a researcher of the peasantry and the oppressed groups who managed to produce a rare happy marriage between his academic approach together with his social awareness and political commitments. His commitment to the plight of the most oppressed sectors of society is evident in all of his work. For example, his work on the peasants of Saucio (*Peasant Society in the Colombian Andes*, 1955) and his magnificent social history and sociological commentary on the rural areas of the Colombian Caribbean coast (*Historia Doble de la Costa*, four volumes, 1979-1984). Moreover, as a participant in the Constituent Assembly of 1991, he proposed a more participatory and decentralised model for Colombia, informed by his sociological knowledge of the country. They are all testimony of a rare example of what we may call a committed intellectual. Globally, he was among the early wave of researchers working with participatory methodologies, helping to define the approach we know as Participatory Action Research (PAR), writing extensively on it, participating in international fora and being one of the organisers of the Cartagena conference on PAR in 1977.

While PAR developed mostly in the context of global agitation of the 1960s and 1970s, it seemed to have survived well the shockwaves of the ‘lost decade’. Still, after some decades, it is valid to ask what has been the contribution of PAR to the practice of social sciences today, and how relevant it is both to committed researchers working with oppressed, marginalised and vulnerable sectors of society, and to the social movements
trying to bring about social change, sometimes in extraordinarily adverse circumstances, such as exist in the Colombian countryside.

**PAR: knowledge through action and action through knowledge**

When PAR first appeared in the 1970s, it marked a veritable revolution in the theory and practice of social sciences, yet its roots can be traced back some decades to the work of people like Kurt Lewin in the 1940s, disciplines like Psycho-sociology in the 1960s and institutions like the Tavistock Institute (Chevalier & Buckles, 2013: 9-33). It was in Latin America, however, where this participatory approach to knowledge production received some of its most important contributions. It was infused with a critical spirit and a radical commitment by the interaction between intellectuals and oppressed, subordinate and marginalised sectors of society. One of the groundbreaking developments and a paramount contribution in this respect was Paulo Freire’s *Pedagogy of the Oppressed* (1972), which put forward the case for an emancipatory education in unequivocal terms. In the face of blatant injustice, the education system can only serve to reinforce the structures of oppression or to promote emancipation of those who suffer from oppression. Emancipation is not a top-down process, where the ‘ignorant’ will receive enlightenment from elites in the know. Rather, emancipation is a process which can only be achieved from within, by the active participation of the oppressed in the very process of developing the intellectual resources to inform their practice in order to overcome domination. Education, in this view, is an intrinsically dialogical process and Freire tellingly dedicated his book ‘to the oppressed and to those who suffer with them’ where the knowledge and the experience of the oppressed are valued as the main basis for any meaningful education process. Education – and we may argue research as well – are not neutral instruments for liberation; they are liberating processes in themselves [1].

Inspired by this approach, Fals Borda began to apply this participatory approach to sociological research (2010). He helped thus to turn PAR into a coherent school of practice in social sciences, which he defined quite succinctly as an:
“Experiential methodology [which] implies the acquisition of serious and reliable knowledge upon which to construct power, or countervailing power, for the poor, oppressed and exploited groups and social classes – the grassroots – and for their authentic organizations and movement” (1991: 3).

The objectives are at once academic and political, putting at the very centre of this approach the experience (vivencias – a term that implies something more than what is merely experienced, but actually what is lived) and commitment of both internal and external participants. Each one of these participants ‘contribute their own knowledge, techniques and experiences to the transformation process’, which stem from ‘different class conformations and rationalities’ (one Cartesian and academic, the other experiential and practical). Thus a dialectical tension is created between them which can be resolved only through practical commitment, that is, through a form of ‘praxis’ (ibid: 4). Sociology, as with any other science, is not a ‘fetish with a life of its own … but it is simply a valid and useful form of knowledge for specific purposes and based on relative truths’ (ibid: 7).

Knowledge is not neutral, for it carries the ‘class biases and values which scientists hold as a group’, therefore, it tends to favour ‘those who produce and control it’ (ibid). Knowledge is power, and PAR in the view of Fals Borda, can help us to apply it to the dismantling of the ‘previous unjust class monopoly’ (ibid: 4). In order to be liberating, PAR needs first to shed the hierarchical distinction between object and subject. Being a participant in this research, means to ‘break up voluntarily and through experience the asymmetrical relationship of submission and dependence implicit in the subject/object binomial’ (ibid: 5). Consequently, this praxis can also be democratising, leading to the:

“Conformation of a new type of State which is less demanding, controlling and powerful, inspired by the positive core values of the people and nurtured by autochthonous cultural values based on a truly democratic ideal. Such a State … would strive for a more even
distribution of power-knowledge among its constituents, a healthier balance between State and civil society with less Leviathanic central control and more grassroots creativity and initiative, less Locke and more Kropotkin. In effect, it would seek a return to the human scale which has been lost in the recent past” (ibid: 6) [2].

Methodologically speaking, PAR is distinguished from other forms of participatory research, because from the very beginning of the research, that is, from the moment of design and deciding what to research, why and how, there is participation from the grassroots. Whether it is collective research, critical recovery of history, recovery of indigenous knowledge, etc., they participate in every single step of the research process (the research methodologies being user-friendly), in the publication of results and in the ‘mainstreaming’ of those results (ibid: 8-9).

Fals Borda left behind a school of thought which certainly outlived him and which expanded throughout Latin America and beyond (Fals Borda, 1987). Yet, Colombia is far from the society he aspired to help build through his tireless intellectual activity. While most of Latin America has been associated for the last two decades with hope and with a certain political renewal which broke the Washington Consensus established in the early 1990s, Colombia has stood out as a stronghold of conservatism. Political assassinations, repression and a dissolving armed conflict still rage in the country decades after the School of Sociology in the Universidad Nacional was formed as a modest contribution to help solve these issues (CNMH, 2013). The panorama is even grimmer if we look at the situation of the peasantry, which occupied such a central place in Fals Borda’s thought. According to the latest Agrarian Census in Colombia, out of a total of 113m of hectares which were subject to this research, 41 percent are in the hands of 0.4 percent of the property owners, while 70 percent of the properties are divided into a mere 5 percent of the land (DANE, 2015).

Even if Colombia looks removed from the Latin American political context, some changes are starting to take place, particularly thanks to the
ongoing transformative struggle pushed by the rural workers, peasants and small-farmers; a fact brought dramatically to the fore by massive and brutally repressed agrarian mobilisation over the last ten years. Some of these aspirations and proposals are expected to be consolidated as the peace process between the national government and the insurgents of the Revolutionary Armed Forces of Colombia – Army of the People (Fuerzas Armadas Revolucionarias de Colombia – Ejército del Pueblo, FARC-EP) progresses, which has made the agrarian question the central subject of the negotiations.

**Peasant Reserve Zones (Zonas De Reserva Campesinas (ZRC))**

Among the most interesting processes taking place in Colombia at present is the constitution of a myriad of Peasant Reserve Zones (ZRC, according to their acronym in Spanish), which are areas of the country defined as having a predominance of public lands (*baldíos*), where land concentration is not authorised. The idea behind ZRCs originally was to avoid the disappearance of the peasantry and to facilitate the conversion of the peasant-farmer into an entrepreneur (ILSA, 2012). Currently, there are six legally constituted ZRCs in a surface area of nearly one million hectares, and there are around fifty other ZRCs in the process of becoming legalised, totalling an estimated ten million hectares (Jerez, n.d.).

The ZRC were originally created under the auspices of the World Bank, while Colombia was going through its own process of economic neoliberalisation during the early 1990s, in tune with developments elsewhere in Latin America. The government at the time was trying to push for a more open economy in its secular attempt to ‘modernise’ the countryside without affecting the class structure and the patterns of land property. This is how Law 160 of 1994 came into being, which replaced the idea of an agrarian reform for subsidies on the land markets to make them more attractive to private investors. Law 160 reduced the role of the state in providing support to specific cases of victims of displacement and offering credit and subsidies to the peasantry to buy land (Gómez, 2011: 65-66; Ministerio de Agricultura y Desarrollo Rural, 1994). Only 13,000 families
benefited from this programme, and while they remain poor, the long term impact they felt was chronic indebtedness (ANZORC, 2015: 9). During those years, the peasantry in the south of the country were mobilising against the fumigation of illicit crops, in particular, cocoa. Those mass mobilisations were the space where the ZRC were first proposed as an addition to Chapter XIII of Law 160. Eventually this would lead to Decree 1777 of 1996 which regulates the creation and purposes of the ZRC and Accord 024 of 1996 which defines the criteria to create each ZRC (ibid: 10).

While the idea behind the ZRC was to bring dynamism to the agrarian sector and stimulate the land market, there seems to be a link between this new attempt of modernisation of the countryside, and the ideas of restricted agrarian reform of the Alliance for Progress in the 1960s. As Michael Taussig argued, the idea of aiding the peasantry to survive as a subordinate economic factor, had more to do with the need of agribusiness to access significant pools of cheap labour rather than with democratising the class and property structure in the countryside (Taussig, 1978). But as the peasantry appropriated this legal entity, it moved from being a mere reservoir of cheap peasant-farmer labour and a pocket of peasant economy [3]. Meanwhile, the idea of genuine agrarian reform was postponed per saecula saeculorum, into being a tool to demand peasant rights, agitate for food sovereignty and for a sustainable and agroecological food production system. What is important is not what the ZRC were created for, but what the Colombian peasantry is using them for, which is their reproduction as a class. The Colombian peasantry has a long tradition of using legal mechanisms in order to advance their plight for land and for a dignified life, thus challenging the status quo, stretching at least to the liberal decrees of 1874 that granted rights to those working on the land (Le Grand, 1988).

In south-west Colombia, in the Cauca Valley, the local peasant farmers’ associations ASTRACAVA (Asociación de Trabajadores Campesinos del Valle del Cauca/Association of Peasant Workers of the Cauca Valley) and CCVC (Coordinadora Campesina del Valle del Cauca / Peasant Coordination of the Cauca Valley) developed, in consultation with its
own members, a project for a ZRC for this department [4]. The following Cauca Valley municipalities have been proposed as part of the ZRC: Florida, Pradera, Guacarí, Ginebra, and Tuluá which collectively occupy a land surface of 63,000 hectares, with an estimated 12,000 people living in them (ANZORC, 2010: 17). The situation varied greatly from municipality to municipality: while in Pradera there has been support of the local government to the idea of the ZRC, in other municipalities, like Tuluá, the authorities’ response has been far from enthusiastic (Posada, n.d.). Nonetheless, the idea of ZRCs is growing. But in order for the project to go ahead, it is necessary to get the consent of everyone in the corregimientos (the localities attached to Colombian municipalities) included in the project, which gave urgency to the need to present it and socialise it with the rest of the rural population in those regions.

Researching for transformation

Although the use of the ZRC as a mechanism for the improvement of the situation of the small-farmer and the peasant-farmer has important support among organised sectors, not everyone in those communities is aware of its implications and the potential benefits they can bring about. Therefore, a socialisation plan for the initiative is necessary in communities which are in the regions where the ZRCs will be implemented. This exercise of socialisation is also an exercise in participatory research and thinking together of collective decisions and actions. It is at this point that PAR becomes a key tool for, at once, researching, educating and mobilising. It is important to mention that those participating in the research team of the CCVC to promote and discuss the ZRC in Cauca Valley, without exception, have not read much about Fals Borda or about the methodological and epistemological developments within the field of PAR. Nonetheless, they all know of his approach and have become familiarised through practice with it, seeing him as an important referent to their work with the communities. In the words of one member of this team of researchers:

“We need to be self-critical. We have not studied about PAR, but in practice we’ve always used its methods and approach, and we
always talk about what we do as PAR … PAR has been appropriated by the social movements, we always work with the communities using that methodology … We haven’t studied it, but we know of compas [comrades] who have … and it is about a dialogue of the academics with the communities … were the emphasis is placed in what the community proposes” (Posada, n.d.).

Another of the researchers insists that PAR has been absorbed as a basic repertoire of practices which is consciously used and has become the predominant way to work with communities:

“We work in a subject-to-subject relationship, I mean, despite the fact that we were guiding the process, we made an effort to always keep an open space of horizontal communication, among equals, not a vertical model in which we would have been the spokespeople and the community mere recipients. This way, the main players in this process were both the communities and us” (Torres, n.d.).

In theory, this is all fairly straightforward. In practice, however, implementing a PAR project is usually riddled with difficulties and tensions. In order to assess the actual practice of PAR in the context of agrarian movements in Colombia today, we will focus on the work carried out in two municipalities, Pradera and Tuluá, which are part of the ZRC project.

**Reflections on the methodology used**

Typically, in order to carry out the research, the local branch of the agrarian union would call all of the neighbours in a *corregimiento* for a meeting on a particular day. Meetings tend to last for a full day, for various reasons: many people have to walk long distances, sometimes hours, to make it to the hall or the venue where the meeting is taking place. Also, because of the very nature of the work in the countryside, in which particular tasks can go on for hours, when one takes a morning off, or a couple of hours even, then it means the whole day is lost and one has to re-arrange the daily chores for the next day. Usually, the meetings are organised with one introduction by the members of the union and the local activist, who explain the importance of the work to be
done and then proceed to introduce the members of the research team, who then explain the methodology to be used on the day. Then the group is divided into smaller groups to allow discussion and thus they work until the day finishes. In the middle, there is a break for chicken or beef soup (*sancocho*) and to drink a murky-coloured drink based on boiled unrefined sugar (*agua de panela*). This is really necessary as people will be working for the whole day and they can’t go back home for lunch. Also, these opportunities are not only spaces for political empowerment and joint reflection, they are also important socialising activities in the life of the community.

The methodology of this particular research was based around the use of *social cartography* coupled with open and semi-structured questions to the groups of participants. The social cartography involved asking the community to describe the territorial space of the *corregimiento* taking into consideration three dimensions which needed to be graphically represented: socio-economical, environmental and productive. For this task, the different sub-groups were given a large blank paper which only had basic points of reference: the boundaries of the *corregimiento*, a hamlet (*caserío*), a main river and a main road. In a few cases, the blank paper with some points of reference was seen as difficult to work with by the participants, who turned the paper in order to start their social cartography from scratch.

From this basic exercise of social cartography of their *corregimiento as it is*, the exercise was to do exactly the same but in terms of how they would like their *corregimiento to be*. Through this exercise, the research team wanted to have a clearer picture of the current situation of territory as perceived, experienced and known by the peasant, but also, to know the aspirations and desires of the peasantry. In the process, the participants gained a clearer social-environmental picture of their territory, while at the same time started to discuss collectively a desirable future they could all help to bring about. Thus, gaining a clear understanding of the gap between their present reality and their aspirations, they can set up strategic tasks for the organisation and give a purpose to the ZRC, which in turns stops being a
mere constitutional article and becomes a living endeavour over which the community has ownership.

In Pradera, the work was carried in eleven out of fifteen corregimientos, whereas in Tuluá, the work was carried in all 11 corregimientos. Researchers had already worked in some of these communities for years, including a series of workshops to socialise the idea of the ZRC back in 2013 which helped to buffer the tension between the external observer and internal participant. The ambiguous position of the participant-researcher in collaborative research has been noted before (Rappaport, 2008), both in terms of the difficulties and the potential of this methodology.

**Discussion**

According to the research team and participants, this work supported reflection in relation to the territory. The community identified what they lacked but also what they had in terms of strengths and resources, a radiography of the territory which is highly relevant given the fact that all of the statistics available on these regions are, as revealed by this participatory research, dated, imprecise, incomplete and flawed. ‘Apart from having more precise and accurate information’, according to one researcher-participant, ‘this process helped the community to recognise themselves within the territory and to propose ways to solve the needs and problems affecting them’ (Giraldo, n.d.). They also identified conflicts in all three areas: social, environmental and productive. One thing that struck one of the members of the research team is that at no point did the aspirations of the communities seem extravagant, individualistic or narcissistic. The aspirational social cartography, according to her, was embedded in the ‘peasant culture; they talked above everything else on how to have their basic needs satisfied in order to keep working on the land’ (ibid). According to another participant-researcher, the bulk of the aspirations were based on the idea of their own family production, the recognition of their work, access to alternative and fair markets, stability of prices for their products, and the ability to live with dignity out of their work.
Among the most significant challenges faced in Pradera was the rejection that some communities felt against the idea of a ZRC. In the five corregimientos where this research was not carried, it was because the communities have suspicion with a project that the media in Colombia, agitated by some right-wing figures, denounce as a strategy of ‘subversives’ and ‘terrorists’. Given the prevalent environment of persecution, terror and ongoing violence in Colombia, these denunciations are not taken lightly by the community and in some cases, they manage to cause fear or rejection among some communities because they associate it with risk. This is particularly the case in those communities which are not so well organised, and are, therefore, less politicised. According to a member of the research team:

“Some people are not well informed of what the ZRC are, this is a big problem … There is a bigger problem, which is linked to the lack of pedagogy around the peace process by the government, which became evident in the process of doing this research … some people still see all of these projects as something removed from their communities, they do not feel it as something belonging to them” (ibid).

This is explained in a context of ongoing right-wing paramilitary violence which has plagued this department for decades (Machado, 2014). As explained by another participant-researcher ‘there is fear in many communities, that’s real … but people react positively to the proposal when we have the chance to explain it’ (Posada, n.d.). Participatory methodologies are important, but they are insufficient if the less organised communities have been absent from the process of designing the participatory research and they are suddenly confronted with a legal entity that has been demonised for the last decade by the media and some politicians.

Another problem which was highlighted by members of the research team in Pradera, is the insufficient numbers of young people participating in the research. This is associated by the participants to a weak peasant identity
among the younger generation in a context of constant migration from the countryside to the urban centres. This is the biggest challenge in any process of empowerment through action-research, because then the decisions and responsibilities will not be assumed by the collective which is particularly worrying when there is a generational problem. Yet, the exercise itself was a good mechanism to develop this peasant identity and peasant knowledge. As one participant-researcher suggested:

“The very peasant culture is being lost, peasant knowledge is being lost, one finds that the peasants themselves underestimate the depth of their knowledge, the value of their practices, and there are many things they know, but that they don’t regard as important to the development of the region. The recognition of the peasant as a subject is something that this exercise helps to happen from the bottom up, in the process of them finding their own solutions to their own problems in their own territory” (Giraldo, n.d.).

This exercise has been useful to remind participants of aspects of ecosystem management – like combination of crops and trees together to guarantee pollination and fertilisation through organic means – which have drifted out of use as the culture of the chemical fertiliser advanced after decades of ‘green revolution’.

An open conclusion: more than a trademark

The use of PAR approaches as part of the engagement of the agrarian organisation with the broader community has been useful. Relying on the knowledge and experience of the communities as a primary source of information, a more complete picture of the terrain in which the ZRC will be applied has emerged. This process has also empowered communities in the process by bringing them together, making them participants in the elaboration of a collective project based on their own aspirations as valuable ideas to foster rural development (along very different lines to what successive technocratic administrations understand as ‘development’). Through its self-reflective approach, and through the dialectical tension
between the insider-outsider which PAR makes evident through a subject to subject relationship, it is also a source of constant questioning for the transformative projects that sometimes resort to hierarchical and top-down methods, often by default. These tensions are the main sources of dynamism in this process of mutual transformation between the researcher-practitioner and the members of a community.

You know the world in the process of its conscious transformation; this basic ethos of PAR, regardless if the acronym is used or not, is alive and well in Colombia and in the process of bottom-up transformation in the countryside. It has therefore managed to contribute significantly to the empowerment of one of the most oppressed and marginalised sectors of society. Although the written works of Fals Borda are not that well known among these practitioners, some of the core ideas of his approach are highly relevant and used in similar environments to those in which he worked some decades ago. Indeed, it is worth noting that Fals Borda’s wife, herself a remarkable researcher, wrote a seminal book, through the use of PAR methodologies, on the history of the peasant organisation in the Cauca Valley during the 1980s (Escobar, 1987). A measure of PAR’s health is the very fact that, in spite of all the problems and limitations of practical implementation, participatory methodologies have become the norm among researchers working together with rural communities.

Notes
[1] In spite of some positivist overtones, earlier in the twentieth century, the anarchist educator Francisco Ferrer Guardia had advanced emancipatory ideas which broke the neat distinction between the bearer of knowledge and the passive recipient of that knowledge and were an important point of reference to radical pedagogy later. See Ferrer Guardia (1976).

[2] The power of this sentence can only be fully grasped if we contextualised it. Written in the late 1980s, as Latin America was starting to emerge, through mass struggle, from the military autocracies that plagued much of the region for most of the latter half of the 20th century. It is this aspect of his
view as a committed intellectual which inspired him to actively participate in the 1991 Colombian Constituent Assembly. This link between science and politics had been present before in Latin America, particularly through the link between positivist thought and the Liberal State at the turn of the 20th century. Science and development have been far more valued in public discourse in Latin America as compared to Europe, for instance, with almost every Latin American country dedicating a statue to Louis Pasteur (Centeno, 2002: 185).

[3] Peasant Economy is defined by the Rural Development Institute of Colombia (INCODER) as an economy based on agricultural units that rely mostly on family work, where production is determined mostly by the reproduction of the units.

[4] Colombia is divided into thirty-two departments (departamentos); each department has a number of municipalities (municipios); each municipality has a number of localities known as corregimientos; and each corregimiento has a number of veredas, or hamlets, each one of them having its own Junta de Acción Comunal or local action committee, a State-sanctioned communal body of basic self-government.

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Perspectives

CAMPAIGNING AND DEVELOPMENT EDUCATION IN THE ERA OF DIFFUSED KNOWLEDGE ARENAS

Son Gyoh

Abstract: This article revives the debate about campaigning and development education (DE), and challenges a widely held view that their distinctive approaches to public engagement are polar opposites, and their methodologies mutually exclusive. It highlights an increasing convergence of the wider objectives of the two endeavours, by arguing how DE and non-governmental organisation (NGO) campaigning target the same constituency. The article is inspired by the findings of a recently submitted doctoral thesis that explored the knowledge dimension of NGO campaigning, and the way virtual public arenas are used to sustain a network of social actors that generate and multiply narratives about development and global poverty.

The article develops a central argument made in the thesis on the complementary role NGO campaigning offers in addressing an inherent tension in DE around its political dimensions and the autonomy of the learning public. The opportunity for NGO campaigners to use their networks as public arenas for meaning making is argued to mitigate the issues of indoctrination associated with approaches to DE. The article makes particular reference to shifts in the way NGOs describe their campaigning as based on knowledge, understanding and values, and how these functions align with the foundations of DE to build public support and competency for action against global inequality (Bourn, 2008). The article further analyses the way the communication channels adopted in both endeavours to engage and mobilise autonomous actors have been harmonised by the digital information and communication era. Such momentous changes in the configuration of their audiences, the public share, and the resources for public mobilisation makes it imperative to review the long held positions that ignore shifts in the
dynamics DE and NGO campaigning operate in, as well as the changing environment and constitution of social actors they target.

**Key words:** Public perception; public deliberation; issue publics; counter-publics; knowledge catalysts.

The motivation to write this article came from my experience as a practitioner in development education (DE) in Ireland, and the contradictions I encountered in mainstream discourses as an actor associated with the inclusion of ‘global South perspectives’. The article aims to explore ways in which campaigners, as well as the perspectives of the assumed beneficiaries of non-governmental organisations’ (NGO) campaigning activities can be included in initiatives aimed at increasing public understanding about global inequality. It highlights new possibilities in NGO campaigning, and argues its complementarity with DE as endeavours that seek to challenge global poverty and inequality through engagement with the public. Campaigning shares common objectives with fields of global education (GE) such as DE and global citizenship education (GCE), to increase public awareness, influence attitudes and mobilise public action through the provision of information and education about development and global poverty. However, unlike campaigning, these fields of GE have their foundation in liberal education, and this presents the problem of how their objective to influence public perceptions and attitudes avoid accusations of indoctrination (Brown, 2013; Elliot, et al., 2010; Standish, 2012).

This article contributes to debates on the complementary role NGO campaigning can play in addressing contradictions in the political dimension of DE as a pedagogical endeavour that propagates normative attitudes and values. In exploring how the practices of both endeavours can work in mutuality, the article also examines common criticisms about campaigning as an activity that can change public perception and increase public knowledge about a defined problem. The arguments in this article draw on evidence from my recently submitted PhD research at the Institute of Education (IOE) in the University of London, in which I explored the knowledge dimension of
NGO campaigning about global poverty, and the way campaign issues are identified and communicated to campaign audiences. The research samples comprised two leading NGOs in the United Kingdom (UK) and one in Ireland, as well as two student-led campaign organisations in the UK that engage in development advocacy and educational programmes with schools. All the organisations were selected through a purposive sampling technique that considered their influence and experience in development advocacy and campaigning on global poverty. The rationale for adopting the purposive sampling technique was based on my background knowledge of the study population, which would enable me to quickly identify typical organisations that would provide rich data (Gomm et al., 2000).

I limit use of the term ‘campaigning’ to refer to activities that are undertaken by NGOs to create public awareness about social conditions they define as unjust, and for which they seek change through the provision of information to mobilise public action. In this definition, I exclude public appeals that are undertaken by NGOs to solicit donations even where such appeals are linked to the ‘unjust conditions’ they seek to change. Such a definition that makes a distinction between NGO charity appeals and their advocacy is important for analysing how campaigning can contribute to accomplishing these distinct but complementary interests.

**Defining campaigners and campaigning**

Campaigners can be described as actors in the public domain that associate and organise around issues they define as unjust, and by which they mobilise, or are mobilised to take action in seeking change (Chapman & Fisher, 2000; Leipold, 2002). Campaigners are conceptualised in this article as a network of NGOs which interact with a range of audiences to communicate their message and extend their narrative to the wider public. On the other hand, campaigning is sometimes conceived of as an activity that takes place in the public sphere, and undertaken to achieve citizens’ awareness in mobilising action on a defined objective (Scheunpflug & McDonnell, 2008). Campaigning is, therefore, a communication strategy adopted by NGOs or similar groups, in achieving citizenship outreach, and a means by which to
mobilise public support for their actions (Dechaler, 1999; Lang, 2013). My use of the term ‘campaigners’, therefore, includes actors in both membership and non-membership organisations. This conceptualisation of campaigners constructs them as co-opted actors that receive, disseminate and act on information that are framed by the organisation, with the aim of accomplishing a set of defined goals. It also provides the basis for understanding campaigners as NGO ‘issue publics’ that receive and extend a particular narrative of the campaign issue to the wider public.

As argued later in this article, the success of campaigning as an activity that can mobilise action and bring about change is not necessarily determined by how campaigners organise as membership or non-membership organisations. The landmine campaign is an example of a campaign action that influenced attitudes and change at both institutional and transnational levels, and in which campaigners were mobilised both as membership and non-members actors. Similarly, more radical campaign organisations such as youth-led campaign groups have been able to accomplish their objectives in challenging the activities of multinational corporations and policy institutions they perceive as unjust (Cox, 2011; Leipold, 2002). The common feature in these definitions is the description of campaigning as a communicative tool for achieving citizens’ outreach and action, and as a way of introducing new narratives that can provoke public deliberation (Dechaler, 1999).

While the focus of debates in the global poverty and public engagement discourse has been around the methodologies adopted in DE, and for NGO campaigning, the fundamental distinction between the two endeavours can be argued to reside in the principles that underline the approaches deployed in communicating the values they propagate. These principles can broadly be described as participatory and transformative learning in DE, and actionable and pertinent knowledge in campaigning (Gyoh, 2015). In examining the implications of these principles and the methodologies they promulgate, it is important to examine how campaigning and DE aim to achieve similar goals in reaching out to their audiences. DE emphasises the centrality of adopting a pedagogical process in programmes
and activities designed to promote public engagement and understanding about global poverty and inequality (Irish Aid, 2006; Tallon, 2013). Implicit in this approach to DE is the need to recognise the autonomy of the individual or learner, and the liberty of independent thinking. Ironically, it is these considerations and principles that are used in arguing the dichotomy between DE and campaigning that also provide the basis for the suggestions of indoctrination sometimes made about DE, in the way it promotes normative values (Standish, 2012).

Quite similar to the objectives of DE, NGO campaigning is planned and undertaken to influence public perceptions of global issues, create change in public attitudes and to spur public action. Both DE and NGO campaigning adopt approaches that propagate normative social conditions, and therefore, adopt particular narratives by which information and knowledge about global poverty is framed and communicated to the public. It is also important to state that the issues and structural reforms both endeavours are concerned with are of a political nature, and therefore, require the interrogation of institutional structures that sustain conditions they define as unjust. The liberal education foundation of DE means that the power imbalances in the production of development knowledge are insulated from interrogation and retained in framing the issue of conflict (Elliot et al., 2010). While it is uncertain how the programmes and methodologies adopted in DE are strengthening action against global poverty, it is even more difficult to discern how the type of actions they propose can accomplish change (Ní Chasaide, 2009). It is also unclear how detached individual actions contribute to challenging the root causes of global inequality.

Available literature indicates that campaigning is under-theorised in both DE and development NGO literature, where it is often described as a subset or the ‘action’ component of advocacy (Cox, 2011; Leipold, 2002; Medsin, n.d.). Similarly, the recent shifts in the way NGOs describe their campaigning as based on ‘values’ and ‘knowledge’ has not received adequate attention in DE literature. For example, Ní Chasaide (2009) has noted that campaign groups that have become professionalised categorise their
operations into skill sets that broadly include public education, policy analysis/lobbying and popular campaigning. These thematic classifications represent a strategic shift from the singular focus on action, and also highlight the importance of knowledge and values as the basis of campaign initiatives. With regard to the peripheral attention campaigning has received from researchers in the development and global justice community, Ní Chasaide suggested that the difficulty in documenting evolutionary experiences could be explained in part by the operational delineation between DE and campaigning (ibid). This dichotomy is further accentuated by the use of funding guidelines by state policy institutions to influence the trajectory of practices, discourses, and the methodologies adopted in DE. For example, both the Department for International Development (DFID) in the UK, and Irish Aid do not include campaigning in their funding programmes for building public support and raising awareness about development issues (COI, 2011; Irish Aid, 2007).

The convergence of principles and objectives

Although the need to understand possible overlaps between DE and campaigning has been discussed by some authors (see for example, Hilary, 2013; Ní Chasaide, 2009), the greater focus has been on exploring how learning can strengthen action for social justice. In examining such overlaps, it is also important to give attention to the principles that underlie their distinctive methodologies in which DE is deployed through learning, and campaigning through informing or knowing. While the theory and practice of DE has incorporated social learning theories in its approach and discourse, NGO campaigning has only recently begun to define its foundation on values understanding and informational knowledge (Gyoh, 2015). These qualities emerged as principles that underpin approaches to campaigning about global poverty adopted by both the international NGOs and the student-led campaign organisations that were included in the thesis sample. In this regard, campaigning is as much about raising public awareness of an action as it is about increasing public understanding about the root issue. In the common aim to challenge global poverty and inequality, both DE and NGO campaigning draw on the same stock of knowledge generated from NGO
field experience, and by policy institutions. While this stock of knowledge is framed and delivered through formal and non-formal DE programmes designed and delivered through learning, campaigning proceeds from actionable information, in which knowledge is framed to influence attitudes and mobilise public action.

However, the difference between the arena of ‘learning’ associated with DE, and the domain of ‘knowing’ or ‘informing’ linked to campaigning, is the autonomy that approaches to problem-based knowledge accords self-directed social actors in meaning making. Such possibilities are further enhanced in the digital information era where the production and diffusion of actionable knowledge is enabled by the communication power autonomous actors have to ‘mass communicate from one to many’ audiences (Castells, 2005: 3; 1997). This era has also enabled the emergence of diverse forms and arenas of knowing that allows the knower to encounter the political dimensions of the campaign issue as well as the generation of common frames through counter-discourse (Fraser, 1992).

Up until the Finding frames report was published in 2011, studies about campaigning in the UK were predominantly focused on surveying impact (see for example, COI, 2009; Darnton, 2009: PPP, 2005), with little focus on the changing environment of campaigning, and the nature of campaign audiences. The Finding Frames report highlighted the implication of salient but critical factors such as the representations of global poverty in NGO campaigning. For example, it described the charity aid narrative NGOs use in their campaigning as surface frames which Darnton & Kirk (2011: 65) traced to the legacy of the 1985 Band Aid campaign that paid more attention to fundraising than sustainable forms of public engagement. The Finding Frames report also outlined the weaknesses in the ‘justice, not charity’ Make Poverty History (MPH) campaign to sustain deep frames to ‘the dominance of consumerist values’ in communicating their message (ibid: 32). The focus of the MPH campaign on communicating with the G8 (Group of eight leading industrialised countries) leaders rather than the public, and the
prominence of fundraising strategies worked against efforts to reframe public engagement with global poverty (ibid).

The valid criticisms about how approaches to NGO campaigning result in a shallow understanding of the root causes of global poverty can also be said of the uncertain impact of the methodologies adopted by DE have had on influencing public perceptions of development. What is argued in this article is that the introduction or use of social justice frames in campaigning will not necessarily translate to increased levels of public understanding. Such frames will need to be multiplied and used as a common frame of reference for public deliberation, and engagement with global poverty and inequality. The paradigm shift in the way NGOs describe their campaigning as founded on knowledge, understanding and values provide a persuasive indication of the complementarity between DE and campaigning. The programmes that are organised by both the international NGOs and the more radical student-led campaign organisations have implications for the perspectives and frame of reference young people bring as social actors and potential NGO ‘issue publics’ (Gyoh, 2015). For example, educational campaign programmes with post-primary schools are important for mentoring young people in developing an active interest in global issues and citizen action.

For big NGOs, campaigning programmes in schools are also designed to promote particular attitudes and ways of perceiving global development issues. For both categories of NGOs, the overall aim of the campaign or active education programmes with post-primary schools, is to promote knowledge, understanding, values, attitude and skills (KUVAS), as reflected in Oxfam’s approach to educational campaigns (ibid). The representation of global poverty is therefore influenced by the values and attitudes these organisations promote in their DE programmes designed around the principles of liberal education that imply an apolitical frame of reference. While the dichotomy between campaigning and DE were acknowledged in the schools programmes undertaken by these NGOs, the
increased emphasis on values, understanding and knowledge in NGO campaigning attempts to close the gap in their approaches.

Adopting a hybrid approach that integrates education and advocacy can introduce young people to activism at local community level in ways that make a link with global dimensions. This form of active education designed around practical challenges such as energy conservation and waste recycling connect easily with the everyday experience of young people, thereby influencing the frame of reference they bring as autonomous actors. What is highlighted in this article is the paradigm shift in approaches to NGO campaigning that has received little attention in the debates about public understanding, and how this gap in knowledge sustains the dichotomy between DE and NGO campaigning. The narrow view of campaigners as action takers that are mobilised to support advocacy initiatives undertaken by knowledgeable professionals within the organisation further portrays campaigning as an activity detached from knowledge on the issue. This conception of campaigners is self-limiting and, arguably, can constrain the emergence of the critical mass of potential catalysts that can generate knowledge and multiply frames for public understanding.

A notable point that emerged from my thesis was that campaigners occupied a dual position of the target audience of NGO campaign messages, as well as social agents that not only act on, but also extend NGO narratives about global poverty. Evidence from the more radical student-led organisations showed that they considered the role of the organisation as directing them to diverse sources of knowledge, and mentoring the next generation of activists. Observation of the websites of the sampled organisations showed that although NGOs such as CAFOD and Oxfam maintain a campaign web link for young people, the content largely focused on mentoring them to start their own campaigns. Social media provided an important medium for information sharing and served as a platform for extending their narratives (Gyoh, 2015). The activities on their websites also showed that most of the campaigns on local issues had a global resonance,
thereby, creating a sense of connection between local campaigners and global issues.

**Bridging approaches for increasing public awareness and understanding**

Considering the paradigm shift in how NGOs conceive of their campaigning, it is important that they provide opportunities for campaigners to engage as stakeholders in constructing and framing knowledge, rather than limiting their engagement to taking action. In that way, NGOs would take on a mediating role in sustaining their network and internet platforms where campaigners can engage in negotiating meanings, as well as actively participate in constructing knowledge on development and global poverty. Chapman & Fisher (2000: 15) have described campaigning as an activity undertaken by groups and individuals that use particular frames to ‘communicate a conflict issue, build public support for their actions, and draw attention to new narratives’. ‘Conflict issue’ is used in the broadest sense to imply contestations about existing social and economic conditions perceived or defined as unjust. Considering the role of NGO campaigners as actors that receive, share, propagate and act on information that is framed by the organisation as knowledge about global poverty, campaigners can be considered as potential catalysts for multiplying public understanding. This occurs when NGO campaigners use similar frames, such as testimonies and images of desperation and disaster designed to trigger compassion and fundraising, or images of protest and interrogation linked to social justice.

However, it is useful to note the important distinction the ‘IF’ campaign (1) evaluation report made on the difference between reducing public awareness about the campaign, and increasing public understanding about the campaign issue (Tibbett and Stalker, 2013). This indicates an acknowledgement by practitioners of the challenge in designing campaigns that go beyond raising public awareness for action, to increasing public knowledge about the issue. The question is how NGOs can design and undertake their campaigning to enable the desired objective of increasing public understanding. In order to move from the point of the stated
recognition of the difference between *raising public awareness* and *public understanding*, NGO campaigning will need to develop concepts that contribute to the theorisation of its practices. Ní Chasaide (2009) has noted the challenges in ensuring the application of common understanding and interpretation of social justice concepts, methodology and frames in the action for global poverty. The purpose of theorisation of experience is to enable the replication, adaptation and improvement of successful practices. Theory can also provide boundaries to guide practice for accomplishing set objectives (Gomm et al., 2000).

An illustration of the importance of theorisation in interpreting the approaches and methodologies adopted in NGO campaigning is found in the conceptualisation of *campaign knowledge* in Gyoh’s (2015) doctoral thesis as the framed information communicated in campaign messages. ‘Campaign knowledge’ was proposed in the thesis as:

“the informational content of campaign messages derived from published and unpublished sources, including testimonies and visual representations of events, and existing conditions in specific countries or regions, as well as the causal factors communicated as factual accounts by which organisations advocate and mobilise the public to take action.”

The term differs from ‘campaign message’, which refers to representations of the conflict issue in NGO media, encompassing published and unpublished information including video testimonies (Dogra, 2012). Developing on such concepts will enable NGOs to develop and adopt strategies that focus on increasing public understanding of the campaign issue, and making the distinction with strategies that raise awareness to take compassionate actions.

**A digital network of social actors**

The advent of online NGO campaigning has seen their interpretation of ‘successful campaigns’ to include achieving a target number of online petitions and actions that bears no relevance to accomplishing the underlining campaign objective. The negative implication of this interpretation of a
successful campaign by NGOs can be linked to the culture of ‘clicktivism’, which is argued to result in ambivalent campaigners who are disengaged from the campaign issue (Ballie Smith, 2008; White, 2010). There is however, a promising side to online campaigning that can be linked to the emergence of virtual arenas of interaction that offer new possibilities for campaigners to encounter diverse sources and forms of knowledge. While NGOs acknowledged the potential of the Internet in promoting their agendas, Thompson (1995) described such virtual spaces as mediated ‘counterpublics’ that provide alternative public arenas where groups excluded from mainstream discourse interact and negotiate meanings on issues of common interest. Evidence from the research highlights the potential offered by digital information technology, and how radical groups such as student-led campaign organisations used their network to generate frames and multiply their narratives (Gyoh, 2015). This possibility aligns with the constructivist approach to knowledge in which social actors actively participate in the construction of knowledge (Kincheloe, 2005). It also conforms with organisational knowledge theory, in which social actors with a shared interest collaborate as stakeholders in the production and dissemination problem-based knowledge in addressing practical problems (Collins, 2010; Lin & Wu, 2005).

Bennett (2004) has suggested that the web has emerged as the most important networking medium for mobilising voices for campaigning because it enables rapid and horizontal dissemination of information, and the potential for interactive opinion formation. This new public space is inclusive, diffused, and global in the way its network transcends and connects actors across social, economic and cultural boundaries. Kech & Sikkink (1998: 2) uses the term ‘transnational network’ to describe actors bound together by shared values and a common discourse. The ‘network’ relates to Castells’ concept of the network society that referred to ‘a complex form of organisation held together by communication and driven by information flows’ (Stalder, 2006: 167). On the other hand, ‘networking’, describes the operation paradigm and the pattern of interaction among social actors with a common interest coordinated by information flows (Castells, 2005). The
The network emerged as important for understanding the structure of NGO campaigners as well as their activities as social actors that create and disseminate knowledge. Recent surveys conducted by Intermedia in the UK and Suas in Ireland indicate that young adults constitute an important element of the network of NGO campaign audience that have an interest in knowing more about development and global poverty (Crompton, 2010; Darnton & Kirk, 2011; InterMedia, 2012; Suas, 2013). However, an interesting point that emerged from the thesis and also found in earlier studies such as Global Generation (Cross et al., 2009) and The World online (Fenyoe, 2010) suggested that young people do not use the internet as a learning hub. However, these surveys also acknowledged that young people use the internet to find out more on existing interests rather than seek new knowledge, and that new perspectives are derived from the meanings they negotiate through interaction. Recent phenomenon on the use of social media by extremist groups to recruit and radicalise young people also provide the basis for reflection on assumptions about the role of the Internet in public opinion formation.

The network of NGO campaigners therefore refers to social actors whose activities are sustained and enabled by the emergence of mediated virtual public arenas earlier described as counterpublics (Thompson, 1995). Such venues enable the generation of counterdiscourse where new narratives and frames filter into mainstream discourse in the way proposed in transformative and social learning theories applied in DE and adult education (Brown, 2013; Mezirow, 2000). The conditions necessary for campaigns to act as catalysts that multiply knowledge for public understanding can be argued to be similar to what is required in DE to influence public perception and attitudes to global poverty and inequality. Both endeavours require that their audiences acquire or bring particular frames of reference as autonomous
knowers and learners, and the nature of their involvement in generating similar frames for extending social justice narratives.

In the above consideration, the approaches NGOs adopt in undertaking educational campaign programmes with young people at post-primary school level is important for the frame of reference they bring as autonomous actors. However, the ability to generate similar frames will depend on the opportunities campaigners have to identify and frame the campaign issue. These two broadly stated conditions are intimately linked to the way DE and NGO campaigning are deployed as endeavours that aim to change attitudes and increase knowledge and public understanding about global poverty and inequality.

**Conclusion**

In analysing the shift in the way NGOs define their campaigning as based on values and knowledge highlight new possibilities that narrow the gap between the foundation and approaches to DE and campaigning. The educational programmes with schools emerged as important for influencing the frames of reference autonomous knowers and learners bring as actors in an expanded and more diffused public sphere, and therefore, provide a platform to integrate discourses in the virtual publics and real world. Another area of complementarity is the encounter and interrogation of political structures and normative values that is in contradiction of the liberal education foundation DE. While this internal conflict has remained a source of critique by some academics, promoting certain attitudes and social justice frames is a core element and objective of DE. The political nature of the values and actions promoted in DE to deepen public engagement makes NGO campaigning the logical agency by which to activate and apply the competence to take informed action. The article argued how the autonomy of NGO campaigners as ‘knowers’ and stakeholders in framing and disseminating knowledge on global poverty mitigate issues of indoctrination associated with DE and other fields of GE.
The emergence of new public spaces where young people and campaign audiences share information, generate and multiply common frames can also contribute to public deliberation necessary for increasing public engagement and understanding (Cox, 2011). The article also argued that young adults constituted the same public audience that DE and NGO campaigning target in their activities. Furthermore, NGO campaigning sustains a network of autonomous actors that act as issue publics that can generate and multiple frames. This constituency of social agents not found in DE are potential catalysts that can multiply knowledge for increased public understanding, as well as strengthen the action against global poverty and inequality.

Notes
(1) IF campaign is the most recent collaborative campaign undertaken in 2013 and planned to coincide with the G8 summit in the UK. It involved over 200 NGOs whose campaigners were linked by an integrated social media platform.

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MOVING BEYOND FUNDRAISING AND INTO … WHAT? YOUTH TRANSITIONS INTO HIGHER EDUCATION AND CITIZENSHIP IDENTITY FORMATION.

Rachel Tallon, Andrea Milligan and Bronwyn Wood

Abstract: In the structured environment of secondary school, young people are often supported by teachers to get involved in causes relating to international aid and development. Beyond school there is often less structural support for such involvement, and new environments may result in their reassessment of personal and collective social action. This article reports on a pilot study that explored how young people conceptualised social action as they moved into higher education. This transition led to a heightened reflexivity about their own and other young people’s citizenship identities, now that they had to craft these by themselves, and often involved more critical and reflective citizenship actions. What is salient for non-governmental organisations (NGOs) interested in maintaining relationships with young people is that as they mature beyond school, young people may be rethinking their role within the development sector. Social action may start to mean more than fundraising and short-term projects and may include a deeper and more holistic approach to being a global citizen.

Key words: Young people; change; social action; transition.

Across our university campus in Aotearoa (New Zealand) we often come across students wearing clothing that bears Mahatma Gandhi’s dictum to ‘be the change’. They are likely to have been involved in social action in primary and secondary school and have an ongoing passion. It is also likely that they have joined one of the many social movements on campus. Our curiosity concerns their perception of enacting change in the twenty-first century, particularly as they move on from school. Leaving school is a recognised significant life transition for many adolescents, and entails considerable disruption to the identities of young people. There is increasing interest in sociology, education and citizenship education about how this time
may affect global citizenship identities and dispositions. This includes the issues that concern young people, how they perceive the nature of change, and what their role could be in that process, particularly their relationships to advocacy organisations.

As young people leave the structures of formal schooling, continued interest or growth in social justice action is often assumed. However, more recently there have been calls for greater understanding about how young people in late modernity encounter times of transition (see Aaltonen, 2013, for discussion on generational changes in civic involvement; Finlay, 2011; Hall, Coffey and Lashua, 2009; Isin, 2009; Davies et al., 2013; Jerome, 2012). These ‘times of transition’ refer to both moving between life stages and the impact of social change on the means and methods of social justice action (Jennings and Stoker, 2004). With regard to the latter, many argue that the nature of their interest and participation has changed in contemporary times (Hustinx et al., 2012; Manning, 2013). A greater understanding of how young people identify themselves as global citizens in times of personal and societal transition is important for those in the development education sector who seek to shape life-long attitudes, but may have less influence beyond secondary schools.

Upon leaving the school environment, there is a period of change which allows for some reflection on processes and ideologies that have shaped their actions to date. The nature of transition is also changing. Young people in postmodern societies face increasing uncertainty and have less known markers by which to identify themselves and move through life (such as getting a job, leaving home etc.). Youth sociologists are mapping the nature of this fluid modernity and the resultant effects it has on civic engagement and the politicisation of young people (Häkli and Kallio, 2014; Percy-Smith, 2015; Shaw et al., 2014; Wood, 2013). Rather than neglecting life transitions, they are often delayed, with young people living at home longer and marrying later (if at all). Added to this are new ways of socialising and different conceptions of solidarity and community.
This article draws on a small pilot project, in which we sought to understand how transition into higher education resulted in various and emerging pathways of citizenship identity for young adults. The project, carried out at Victoria University of Wellington in 2015 involved a semi-structured focus group interview of 75 minutes with five students – three first-years and two third-years, one male and four females. All five students had been the service leader at high school which involved liaising with both national and international non-governmental organisations (NGOs) to raise awareness, fundraise and take part in projects. They had been successful in these roles, often raising significant amounts of money and initiating new projects.

The young people were asked how they viewed the transition from school to university with regards to both global and local issues, civil society organisations and their own social action. We used thematic and biographical analyses to identify key life-course events that led to a re-working of their citizenship identities and pathways. Ethical permission was gained from Victoria University and all names of participants and identifying features have been altered to maintain their confidentiality.

The reworking of citizenship identities and pathways
The students reported that their experiences of service and social action at school were often limited to feasible short term projects, and often under the umbrella of fundraising. Although rewarding at the time, they reflected that these activities were often very time consuming and it was difficult to balance their projects alongside their studies. Questioning how things had always been done was not always encouraged, and structural issues were rarely the focus, with the primary aim being raising awareness or fundraising for specific causes. Looking back on their social action at school, ‘doing service’ carried with it connotations of continuing and improving what had gone before, gaining from the leadership experience and promoting the status of the school in the community rather than active social change agendas. In contrast, their arrival at university caused them to rethink these roles, often challenging the way they had previously conducted social action. We
identified that this reconceptualisation consisted of four citizenship identities and pathways. The first three – a deeper level of criticality, finding their passion, and merging a consumer-oriented approach with social justice action – opened a wider realm of possibilities for engagement. Conversely, and fourthly, the lessening of structure and support experienced at high school, had resulted in levels of disengagement and disempowerment that they observed among their peers, and this caused greater reflection on the nature of both service and social action.

First, and for all, the transition to higher education led to a deepened criticality of structures and systems related to social justice action, whether on a local or international scale. They became aware that what had been acceptable in one context was no longer suitable in another, causing them to rethink both the nature of the causes and their actions to reduce social injustice and inequality. One participant, Lincoln, described the ‘cookie-cutter’ approach that he had been used to at school, where all the forms and collection buckets had been ‘done for you’. With greater freedom to take some initiative, he was aware that he had now moved beyond a formulaic approach. Further, a new and less teacher-structured environment called upon different skills. Now they needed initiative and courage to take risks and to think beyond fundraising, something they were less prepared for. Higher risk notions of social action, such as protest, were located as ‘something a third year Arts student might do’. In some cases, they realised there was simply less money available in the student community and so things had to be done differently and this also entailed a rethinking of the raison d’être of social justice action. Together this meant that they had a deepening criticality of the processes behind social action. The participants reflected that ‘robbing the rich to pay the poor’ was now difficult as the rich were no longer so close and their immediate community much poorer, more diverse and less captive or receptive as an audience.

Second, they were deeply reflexive about how service and social action was an intrinsic part of their personality and identity. Perhaps this had not been so apparent to them beforehand, but now, in this time of change, and
articulating this as such during the focus group, they realised that serving others and pushing for justice in some form was part of their identity, as this participant expresses:

“Well, I do think that people who were involved in leadership in school, it’s part of your character, you want to get involved in helping others and whether it’s the way you were brought up or born, you have this tendency and that does tend to follow you throughout your life and you can't really escape from it. Like my first year I was working like two jobs, one at Subway and one in some kitchen, like I was ‘I’m taking a break from service!’ and it only lasted much less than six months, may be four months” (Rihanna, third year student).

In addition to reflecting on their own dispositions, they mentioned a growing awareness of justice and development action occurring within their professions, such as law or education. This enables them to align several dimensions of their life in a ‘win-win’ situation: meet new friends, network with professionals in their chosen field, and find something to be involved in that they can be passionate about and that helps them with their career prospects. In the following extract, the participant highlights that she chose to be involved in an area that she herself was passionate about and aligned with her interest in education:

“What I’ve been passionate about which is refugees and teaching second languages and stuff like that, so over time I kind of had to find… cause I can't give time to everything, ’cus I tried to in second year pick something that I was passionate about and follow that through…”

Later on she reflects that passion is key to people being involved:

“And it’s what they're passionate about, not just what someone tells them to agree to, or give money to. It’s like they genuinely want to help this cause or believe in this cause and that's why they get
involved, not just because they want to do something” (Tanya, third year student).

This newfound critical orientation to social justice action meant that they had also started to question the nature of their actions and their relationship to civil society and international development in a new environment. Having been heavily involved in service leadership at their schools, they were struggling to reform their identity as activists or as those involved in service, a less political term and one that they were more comfortable using.

Third, neoliberal and entrepreneurial notions of service, in line with observations by Bryan (2013) and Chouliaraki (2013) were mentioned in a favourable light. These notions were likely to have followed them from their fundraising focus in high school, but were also encouraged by a university reward system for students who demonstrated leadership in fundraising and service-related avenues. The participants were comfortable using marketing terminology to sell a service or product that benefitted the consumer as well as the recipient of the goods or money. Tailoring to the needs of the consumer and marketing a story reflects the trend of consumer-based individual action being twinned with benefits as opposed to sacrifice or action from a sense of moral duty.

Not all their comments were about the financial rewards of their fundraising ventures. The participants reflected that one of the key benefits of their engagement in service had been the empowerment and personal rewards from seeing other people become involved in the projects they had led. Thus, the eventual recipients were not part of their close experience necessarily, but seeing their peers become interested in social action had been very rewarding. That their peers might be less interested now and that it was harder to sell an idea to them or get them involved was part of this transition.

Fourth, a lessening of structure and support appeared to result in a drop-off in engagement, which ran counter to their strong identification with social justice causes. For example, Lincoln explained that he had joined the university service programme, but felt disconnected from its mission, feeling
like a small cog in a big, impersonal fundraising machine. In addition, the formal nature of the programme did not fit with his innovative and risk-taking nature. In a sense, he had moved beyond ‘rattling the bucket’. This description of a drawing back from structured civic involvement during times of transition is described by Jennings and Stoker (2004). Young people withdraw their civic action and trust between fifteen and thirty-five years, with the lowest point at twenty-five years, increasing only once they assume adult roles and responsibilities, such as employment and home ownership. Where continuity exists, it is often through involvement in organisations – for example, religious, cultural or sporting institutions – that provide a sense of stability for these transitional times. The students observed that the university did not provide this continuity for many of their peers, who were not as persistent in pursuing social justice or service in the new environment. From their observations, many first years in particular do not actively seek to participate in social action of some description. The participants noted that different demands and less structure mean that many ‘don’t go looking for it’ as this participant explains:

“I think the only problem with that [self-organised projects in the community] is that it requires initiative to go and look for things that need to be done, like I think that’s why service can decrease when people go from school to uni because they now have to, instead of getting these opportunities handed to them, to give money or give their time or whatever it’s organised by the school, now they have to go and do it themselves and it’s not even that people can’t be bothered, it’s just that they don’t even think about it exactly” (Michelle, first year student).

While the students recalled how the loss of supporting structures and a known community presented new challenges, leaving those demands was also seen as a respite. There is almost a sense of guilt in their comments that they had wanted a break from service, as they had experienced it at school:
“Yeah, like in my first year I probably didn’t do anything, like after my Year 13 I was over it, like I was so over year 13, I was tired and just wanted to enjoy university and I had no money and no time anyway. And then in second year I went looking for it, because I missed it obviously, so I went to VicPlus [1] and that kind of stuff” (Tanya, Third year Participant).

Discussion

Hildreth (2012), describes that the reflective experience of transition is based upon felt difficulties – the person knows something is not quite right in the new context, and they have to diagnose what it is that is different and what needs changing. Individually and together, the students were wrestling with their identities and agency as social justice workers. In analysing this transitional phase of their lives students clearly wanted to be good citizens, to make a difference, and be recognised as active citizens. Yet they struggled to reformulate what had been a fairly formalised part of their lives at school that required little critical thinking about what they were doing but a lot of time and effort. The rewards for them had been great and they felt it was part of their nature to continue in some manner. Without financial security, in a new and unfamiliar community, where they no longer received letters from NGOs and no longer had committees to lead, it felt like an abyss, a void of some description. They could see their peers become disinterested, and yet they searched for something that they could do and become.

Conflicting tensions were held both within and across the four pathways and were the source of their felt difficulties and ennui. All the participants grappled with how to proceed in their new environment and displayed conflicting thoughts and frustrations as they searched for new opportunities. Volunteering their time and finding a niche that complemented their studies meant potentially less leadership and more uncertainty. There was an undercurrent of peer pressure in that many of their peers who had been keen and active at school, were no longer so involved as the structures were not there to guide them. These participants recognised that they had navigated their way through this transition by trying different ventures, still
seeking to ‘be the change’ in some form or another, but short term fundraising projects were no longer so applicable and even the service programme offered by the university did not fulfil their expectations. In short, they had started to question their expectations, entertain some aspects of critical thinking about fundraising and service and as a consequence, rethink their identity as citizens passionate about social justice.

The result of greater fluidity and diversity in life is that young people in late modern societies are often much freer and possibly more compelled to craft their own identities and this means they often transform the nature of action. It is this notion that they can be agents of change rather than just cogs in a wheel that is one characteristic of neoliberal times that stresses the entrepreneurial individual. This has its advantages, but also a cost. The burden of change is rethought in terms of economic or technological advancement, with social or political movements marginalised as inferior. ‘Be the change’ might mean something closer to ‘invent something new’ rather than ‘apply pressure on leaders to change a law or policy’. This individual and agential power was illustrated by one of the participants who, while volunteering in Africa as part of her gap year, had posted on Facebook a story about someone in her village seeking a scholarship for their studies. The power of the story on social media meant that she was able to raise funds for this person from people globally, bypassing the older, more formal channels of aid. In effect, she became the NGO for this person, and although the means by which aid was conducted had changed slightly, structurally, not much was different to the older more formal channels. The notion of development was still immediate financial aid, rather than long term systemic change. Returning to home, ordinary forms of fundraising may have seemed less fulfilling causing more reflection on her part as to how to proceed in social justice.

The drop-off by their peers, observed by these participants was also a driver for their own reflections. They could articulate that narrow options and the burden of social justice meant that university provided their peers with a good excuse to leave those activities behind, if not permanently. They
themselves indicated that they had experienced some fatigue of the processes involved (Wilson, 2010), but they had remained passionate, and this was in a large part due to their temperament. In their reflections during the focus group, the participants remained positive about social justice action and considered their new environment challenging and wider than the narrow confines of school. What they collectively expressed was a lack of direction and support about how to proceed.

**Conclusion**

This time of transition is a clear moment of citizenship identity formation and yet there is little research into how this affects attitudes towards development initiatives. For the participants in this study, social justice action had empowered them and they looked for this reward in their new environment. They recognised that this transition time had caused them to reflect on what action they could reasonably take – action that served society and met their passions, but most likely, an individual action for incremental benefits that would not ‘rock the system’, and could be beneficial to their careers. This state of affairs Vogelgesang and Rhoads (2003) note as being a way of conceptualising global citizenship that privileges individual acts of compassion over uncomfortable and collective based action. Individual acts are quickly rewarding and provide those with initiative leadership opportunities. They should not be discounted, but at the same time they are limited to certain contexts. They note that the situation can arise whereby political activism is actively discouraged by some universities in their service programmes, creating a de-politicisation of social justice action. Service or any form of social action can become limited to safe acts that are approved by the system.

Within the school environment, some NGOs encourage collective action that is more overtly political, while others favour a softly, softly approach that concentrates on raising funds and the feel good factor. The literature concerning young people and their civic and political engagement has raised concerns of the de-politicisation of social justice action and Westheimer and Kahne (2004) warned of service or civic education at school
creating compliant, do-good citizens locked into a formulaic citizenship that denies them agency. Is this true for development education? Young people shown methods of action that fit a certain set of citizenship values are unlikely to question the status quo, including NGOs themselves. This echoes concerns that others have had concerning the narrow focus of development education. What methods of social justice action are they modelling, what kinds of global citizens are they encouraging? What is salient for development educators is that times of transition in people’s lives can cause a reflection on their engagement with the development sector. If feel good actions empower people, what happens when the action requires difficult sacrifice, possibly jeopardising one’s career? If prior engagement has been surface deep on a predictable fundraising cycle with no questions asked, then new contexts and new distractions will break any linkages. Instead, a deeper understanding of social justice as an act of solidarity and a long term view will enable people to strive collectively for justice in whatever context they are in. In her New Zealand study, Lewththwaite (2015) found that university students who had studied development issues with a critical lens at school were more likely to engage in social action with a long-term collective perspective.

There are many avenues of social justice action beyond fundraising and for these participants they had to find new ways themselves, almost groping along in the dark to find their fit. It is due to their tenacity and nature that they persevered. For many others, this transition is not a time to reflect and reinvent, it is a time to ‘put away those childish fundraisers’, a comment sometimes expressed by students as they dismiss social action (which is narrowly conceived) as being ineffective or nice, but not for them right now. Development education needs to ensure a deep and critical engagement that moves beyond the ‘fun, fasting and fundraising’ elements (Bryan, 2011). If the activists by nature who have also had parental role models find it difficult to make the transition, then those not so inclined are much less likely to pursue social justice causes and raise the difficult questions about how we live in such an unequal world. Social justice action runs the risk of being an optional extra that serves the interest of the
benefactor, ‘nice to do, if you have the resources’. Action may be packaged up to avoid the difficult questions and continue the systems that paper over the cracks. Being empowered through doing good is a beginning and a place to start. People mature and begin to recognise that being a good citizen can also mean being a ‘pain in the butt’. Perhaps encouraging young people at school to critique and to question can better prepare them to not just ‘be the change’, but also cause the change in the twenty-first century.

Notes
(1) VicPlus is the leadership reward programme of the university which encourages students to participate in activities of service.

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ARE WE CHANGING THE WORLD? REFLECTIONS ON DEVELOPMENT EDUCATION, ACTIVISM AND SOCIAL CHANGE

Stephen McCloskey

Abstract: This article aims to support reflection and debate on how development educators engage the public on international development issues. The article comes on the back of recent research, most notably BOND’s *Finding Frames* report, which suggests that the development sector is struggling to enhance and sustain citizenship engagement on the structural causes of poverty and inequality. The article probes some of the factors that may underpin this lack of engagement both within the development education sector specifically and the wider development sector more generally. It examines some of the challenges involved in engaging learners in actions on global issues. Some of these challenges relate to the sectors and environmental pressures in which development educators operate which can thwart in-depth engagement with learners.

The starting point for the article is the shared commitment by many national and international governmental and non-governmental organisations to the action outcome in development education. It goes on to discuss why this core element of our practice is largely marginalised in the planning and delivery of many development education activities and projects. The article argues that this, in part at least, is due to failings within the development sector itself as well as the education sectors in which we operate. It suggests that if development non-governmental organisations (NGOs) fail to address the structural causes of global inequality as part of their activities then they cannot expect to engage learners and stakeholders in actions that will reduce poverty. The article appeals for greater clarity and openness with learners in terms of the kind of change that the sector wants to achieve. This does not mean prescribing actions but supporting learners in designing their own forms of active engagement. Ultimately, the article encourages development educators to reflect on the action outcome as a central tenet of our practice and think about how we can become more effective agents of change.
For many of the leading stakeholders in development education (DE), the action outcome is a given. Governments and non-governmental actors alike regularly encompass a form of engagement or action on the part of the learner as the culmination of the DE methodology. One of the distinguishing characteristics of DE is what Paulo Freire, the towering foundation of contemporary practice, calls ‘liberating action’. The action is liberating because education has a transformative capacity to overcome oppression and alter the social relations that perpetuate inequality and elitism. Cut from the cloth of grassroots activism, Freire’s Pedagogy of the Oppressed became a revelatory text because it recognised the social and economic power of education to ‘transform reality’. One of the dominant discourses of contemporary DE practice focuses on the extent to which this radical mission has been softened or diluted through DE’s negotiations for recognition in mainstream education systems (Bryan, 2011; Selby, 2011). In his ‘Foreword’ to Pedagogy of the Oppressed, Richard Schaull accepts that it would be ‘absurd’ to suggest that Freire’s work with illiterates in Latin America could be adopted in our system. And yet, he finds parallels in the ‘culture of silence’ to which the poor here are subjected and the objectification that often attends submergence in ‘our advanced technological society’ (1993: 15).

But what of the action imperative in contemporary development education practice? To what extent does this still hold as the culmination of the DE learning process? In a report produced for DEEEP, Sandra Oliveira and Amy Skinner suggest that ‘The time is ripe to examine questions around citizen engagement for change, given that recent times have seen a rise in citizen action for social justice as a response to the economic crisis’ (2014: 9). This article reflects on what we mean by action and engagement on the part of the learner. It considers the extent to which development organisations are equipping learners to implement change as part of the DE process. Has a creeping depoliticisation of DE organisations become
reflected in how we engage with learners and what we expect from active citizenship? Is action merely a mantra for development educators or inherently structured within the planning and delivery of DE activities? The article first locates the action outcome within the stated goals of key development players

**Development education and the action outcome**

The action outcome is a shared element in definitions of development education and other related terms such as global citizenship, global education and global learning. Definitions from across governmental, non-governmental and inter-governmental organisations and institutions appear to agree that development education should result in behavioural change on the part of the learner. UNESCO, for example, emphasises the local and global dimensions of ‘global citizenship education’ and the ‘active roles’ required to ‘resolve global challenges’:

> “Global citizenship education aims to empower learners to engage and assume active roles both locally and globally to face and resolve global challenges and ultimately to become proactive contributors to a more just, peaceful, tolerant, inclusive, secure and sustainable world” (2013: 3).

The Development Awareness Raising and Education (DARE) Forum offers a European perspective on development education as it represents national DE platforms across the EU. The DARE Forum agreed a definition which states that:

> “Development education is an active learning process, founded on values of solidarity, equality, inclusion and co-operation. It enables people to move from basic awareness of international development priorities and sustainable human development, through understanding of the causes and effects of global issues to personal involvement and informed actions” (quoted in DEEEP, 2012: 6).
DEEEP emphasises the values that are central to development education practice and describes the DE process experienced by the learner as moving from ‘basic awareness’ to ‘understanding’ to ‘personal involvement’ and ‘informed actions’. The Irish Development Education Association (IDEA) is more forthcoming on this process when it suggests that development education:

“Seeks to engage people in analysis, reflection and action for local and global citizenship and participation. It is about supporting people in understanding, and in acting to transform the social, cultural, political and economic structures which affect their lives and others at personal, community, national and international levels” (IDEA, nd).

The IDEA definition directly engages with a key concept in the pedagogy of Paulo Freire called reflective action which combines analysis and action in popular participation around development issues. It also expands upon the learner’s level of engagement from the personal to the international beginning with a self-awakening of critical consciousness which Freire suggests ‘leads the way to the expression of social discontents’ (1993: 18). IDEA also connects the local and the global in its definition and frames the kind of issues that DE addresses – social, cultural, political and economic. The Irish government’s development education strategy plan offers a definition of DE that is closely aligned to that offered by non-governmental actors. It suggests that:

“Development education aims to deepen understanding of global poverty and encourage people towards action for a more just and equal world. As such, it can build support for efforts by government and civil society to promote a development agenda and it can prompt action at a community and individual level” (Irish Aid, 2007: 6).

It is perhaps unusual for governments to advocate public action in support of a strategy plan but we regularly find the action outcome attached to policy
documents in the sphere of development education. We normally assume governments to be reticent about public mobilisations in any area of policy much less to encourage ‘prompt action’ at individual and community levels. But in the area of development education there appears to be an assumption of a shared endeavour with NGOs and the public in pursuit of global goals that we can all support. It may be the case that the global, ‘other-worldly’ nature of international development makes governments feel more comfortable in urging action outcomes. The Irish Aid definition is linking ‘government and civil society’ as partners in support of a ‘development agenda’ and exhorting the public to join this effort.

The shared action outcome in these definitions establishes that DE is a learning process designed to go beyond education as an outcome and toward education as a means toward change. We have some broad understanding of the goals of DE in these definitions including: sustainability, justice, fairness, equality and security. We also have a recurring sense of the DE process involving personal development but cascading outward toward the community, the nation and the wider world. However, the definitions are not prescriptive in terms of intended action outcomes and the next section turns to how we engage with learners in the process of social change.

**Praxis**

Freire’s conception of social transformation is intrinsically linked to the concept of ‘praxis’ which is a combination of *reflection* and *action*. He regarded this ‘radical interaction’ as a prerequisite for meaningful social change. Reflection without action, according to Freire, was a matter of ‘idle chatter’; a mere ‘verbalism’ without agency. On the other hand, action without reflection amounts to ‘action for action’s sake’; mere activism devoid of thought. If one of these two crucial elements is missing then the other immediately suffers and the element that combines them is dialogue. The process of dialogue should be inclusive and open ended without prescriptive outcomes thus ensuring that any agreed action has a collective ownership rather than one that is imposed or preordained. Therefore, the
Development educators regularly draw upon the various elements of Freire’s praxis in their definitions of DE and description of their aims and objectives. We regularly find a combination of awareness-raising, analysis, reflection and action in a development education formula like that below which is assumed to result in some kind of desired social change.
But we can’t assume the success of this formula, or anything like it, without considering a number of environmental and methodological considerations that can determine its outcome. These include:

*The opportunities or constraints imposed by the sector in which the learning is delivered.* For example, the level of recognition offered by a schools’ curriculum or teacher training programme to development education.
The duration and quality of access to the learner. For example, the difference in learning outcomes possible in a one-off workshop and a one year course. Or the contrast between an over-crowded classroom and a small, participative group.

The quality of resources available to the teacher and learner. For example, the availability of resources that support critical thinking as opposed to those that reinforce damaging stereotypes and myths about development and the global South.

The quality of teacher training both for practicing and trainee teachers. For example, are teachers given opportunities to experience development education methodologies and supported in their use in the classroom?

The institutional approach to learning within an educational sector. Does the school, youth group, community association, university etc. support transformative learning and social change?

The level of community engagement in the learning experience. For example, is the local school actively involved in community development through extra-curricular activities? Or is the school isolated from the local community and any movements for social change?

The connections made between the local and the global. Is the learner given the opportunity to understand the concept of interdependence and develop a sense of solidarity with people in struggle for social justice in other societies?

The pedagogical approach. Is the teacher willing to facilitate a dialogical exchange with the learner in which all experience is valid? Or is the approach one of ‘banking’ or depositing knowledge in the head of the learner?

This list is by no means exhaustive but alludes to the challenges confronted by the educator and learner in trying to embrace development education in
‘our advanced technological society’ which is experiencing alarming levels of material inequality (Oxfam, 2015) and social disconnection (Wilkinson and Pickett, 2009). Within these challenging contexts what kind of actions are possible and how do development educators support citizen engagement?

**Levels of citizen engagement**

As part of his research on citizen engagement with the global justice movement in the UK, James Trewby identified five continuum lines (see Figure 2) which should capture most forms of active citizenship. The five lines of engagement are: *low cost and high cost* which refers to ‘expenditures of time, money and energy’ on the part of the activist; *low risk and high risk* which speaks to anticipated dangers ‘whether legal, social, physical, financial’ etc attached to the particular form of activism; *conventional and unconventional* forms of engagement spanning petitions and lawful demonstrations to non-violent direct actions and, ultimately, violent actions; *non-political to political* activism – the former may be more community-oriented and grassroots focused and the latter more concentrated on political or business elites; and, finally, *individual and community* activism with the former concentrating on lifestyle changes such as consumer choices and the latter representing shared, public participation such as marches and protests (2012: 7-9).
Meyer suggests that ‘for most people, participation in a social movement is dependent upon coming to a belief that a problem is (a) urgent; (b) has potential solutions; and (c) that his or her efforts might matter’ (2007: 453 quoted in Trewby, 2012: 13). Trewby suggests that the first useful precondition of action is ‘knowledge of injustice’ and the second is an
individual’s belief that ‘they are able to become engaged’ (13-14). Clearly, development education can play an important role in creating the preconditions for engagement through its awareness raising activities, critical thinking skills, capacity for attitudinal change and promotion of positive social values such as respect, diversity and interdependence. However, within the DE sector there are different conceptions of action including the idea that the learning process itself is an acceptable learning outcome.

**Debates around action**

A report by Fricke and Gathercole suggests that there are typically three transformations or outcomes pursued by ‘adjectival’ educations – those that are pursuing some form of social change through citizen engagement. The first is a ‘personal’ transformation that can result in behavioural and attitudinal change through the development of a sense of ‘social responsibility’. This transformation is driven by values that are central to DE such as diversity and respect, and can lead to a ‘commitment to action’ rather than resulting immediately in active citizenship. For some educators, their role is one of providing critical thinking skills and promoting action rather than supporting the learner in taking action. The second transformation promotes systemic change through education which enables the learner to ‘acquire an interdisciplinary, holistic perspective on the world and its processes’ (2015: 16). Learners are assisted in the process to ‘develop and improve action-oriented and decision-making skills’ (ibid).

The third transformation is perhaps the most familiar to DE practitioners as it seeks to eradicate poverty and inequality through community/societal transformation. It is concerned with sustainable development, and seeks to influence political, economic, social and environmental decision-making. Fricke and Gathercole offer words of caution in respect to whichever of the three transformations are pursued suggesting that we cannot assume a ‘linear mechanism linking learning to change’ as it ‘probably doesn’t exist’. The complexity of the issues involved, particularly in regard to systemic change, makes it difficult to effect transformation. The key, they suggest, is not to prescribe predetermined
outcomes but to prepare the learner for ‘different rationalities’ where sometimes they will have to change how they ‘gather and view knowledge and understanding’ (ibid).

Focusing on activism with young people, Temple and Laycock take the view that educators should be very open and clear about their agenda for change and actively support children in taking action on global issues. They see two main benefits in this approach: first, ‘it enables us to justify the changes we are working for and the values that drive our work’; and second, ‘it enables us to open up our goals and values to critical analysis’ (2009: 101). They argue that we are often vague as educators about the actions we would like young people to take despite this being the ‘societal purpose of education’. Temple and Laycock ask: ‘Just as we support young people to learn about the issues, should we not, therefore, support them to take action on those issues?’ (103). They go on to suggest that at an early stage of the learning process young people can be supported in their action building through a ‘more structured, direct (but never manipulative) form’ and, as the young people develop, we can ask them ‘to design their own actions and manage their own direction’ (ibid).

As practitioners this involves nothing less than ‘examining our agendas for change, reflecting on our values and principles, revisiting how we conceive active global citizenship, and re-appraising how we communicate and interact with young people and teachers’ (106). Therefore, rather than hedging on the issue of action outcomes why not bring it front and centre of the learning process and structure it within the planning and delivery process? This more positive and foundational approach to active citizenship would appear to be urgently needed given the increasing difficulties experienced by the development sector as a whole in creating the pre-conditions necessary for sustaining citizen engagement with the structural causes of poverty and injustice both locally and globally.
Public attitudes to development
There have been important and influential recent research studies on public awareness of international development issues and the extent to which the development sector is failing to engage and sustain citizen involvement in poverty eradication efforts. Hudson and van Heerde (2009, 2012), for example, in surveying public attitudes to development have characterised public support for development ‘as a mile wide and an inch deep’. They suggest that the survey instruments used to measure public attitudes are ‘not fit for purpose’ and, perhaps more importantly, that there is a sectoral lack of understanding of the ‘factors that motivate support for development aid in the first place’ (2012: 5). By focusing on the measurement of public support for development rather than ‘the variation and determinants of individual support’, the sector finds it difficult to sustain that support. Moreover, in the difficult economic environment for the development sector since the 2008 global financial crisis, ‘public support appears to have turned against international development efforts’ (ibid). Hudson and van Heerde argue for future research that directs ‘its attention to a more nuanced understanding of the determinants of individual-level support, moving beyond existing self-interest versus moral frameworks’ (18).

Another influential research report commissioned by BOND called Finding Frames (Darnton and Kirk, 2011), also questioned how development NGOs elicit public support and, in particular, the values and frames used to appeal for civic engagement. The report argues that values and frames ‘offer ways to look at the problem of public engagement’ and ‘identify possible solutions’. Frames are the ‘chunks of factual and procedural knowledge in the mind with which we understand situations, ideas and discourses in everyday life’ (2011: 5). It suggests that development NGOs in the main have appealed to transactional frames rooted in consumerist values in their engagement with the public. The transactional frame is one ‘in which support for tackling poverty is understood simply as making donations to charities’ (7) as opposed to transformative frames that are based on self-transcendent values and support ‘pro-social’ behaviours.
The report uses the example of the Make Poverty History campaign in 2005 which succeeded as a mass mobilisation but its transformative potential was ‘drowned out by the noise of celebrities, white wristbands and pop concerts’ (2011: 6). It argues that Make Poverty History resulted in an ephemeral engagement with the issues based upon transactional frames that were an unwelcome throwback to the Band Aid initiative of the 1980s. Indeed, Hudson and van Heerde concluded rather depressingly in 2012 that, ‘Despite massive awareness-raising initiatives such as Make Poverty History, the Jubilee Debt Campaign, and Comic Relief, the public understand and relate to global poverty no differently than they did in the 1980s’ (2012: 20). Development educators will undoubtedly concur with the Finding Frames analysis of public engagement and share the view that sustained civic engagement with development issues is dependent upon a greater investment by the sector in the pre-conditions for action identified above. Therefore a large part of the equation in civic engagement is the approach adopted by the messenger as much as the message itself.

The development sector and social change
The level of civic engagement with development issues that we can expect from the public is, to a large extent, determined by the strategies, policies and education programmes implemented by NGOs and civil society movements. Critical voices from within the sector have argued that in return for marginal traction with governments and statutory bodies, development NGOs have narrowed their policy engagement to the issue of overseas development aid at the expense of deeper public understanding of the root causes of global poverty (Hilary, 2013). This depoliticisation of the development sector has arguably resulted in the soft rather than critical forms of public education that have accompanied initiatives such as Make Poverty History. The mass mobilisation generated by these initiatives has quickly evaporated and resulted in questionable policy outcomes (McCloskey, 2011). Within the development education sector, too, we’ve heard suggestions that DE has been ‘declawed’ or ‘stripped of its original radical underpinnings’ (Bryan, 2011: 2) as ‘The neoliberal emphasis on performance, efficiency and accountability
within the development industry’ has narrowed the development aspirations of the sector (ibid: 3).

Selby and Kagawa similarly asked if there are signs within DE and the closely related sector of education for sustainable development (ESD) of ‘a compromising of values and trimming of original intentions and visions happening in the light of the global marketplace?’ (2011: 18). In falling in with the prevailing market-driven ideology, Selby and Kagawa found that ‘a kind of Faustian bargain is struck; a collusion with the prevailing neo-liberal worldview in return for some, likely ephemeral, purchase on policy’ (ibid: 17). Selby and Kagawa found in their research of a sample of development education policy and research documents an apparent acceptance of the neoliberal growth model and/or a failure to critique the relationship between that model and increasing poverty and inequality. This view chimed with that of Andy Storey who drew attention to the muted response from the development sector in Ireland to the spectacular collapse of the Celtic Tiger economy in 2008 and subsequent imposition of severe austerity measures by the International Monetary Fund (IMF) and its European Union partners. Here was an opportunity, suggested Storey, to learn from the structural adjustment programmes disastrously imposed by the IMF and World Bank in the global South. Storey argued that ‘If an opportunity for education from the South is being lost here, then so also is an opportunity for education about the South’ (2011: 82).

Whether it be, as Selby and Kagawa suggest, a case of ‘sleeping immersion in current orthodoxies’ or ‘studied omission’, many leading players in the development/DE sectors appear to be ducking the dominant question of neoliberal-driven globalisation in accelerating poverty and inequality. This wider sectoral consideration has in turn a significant bearing on the potential outcomes that can arise from the practice of development NGOs. If we fail to correlate market-driven growth with record levels of economic inequality then how can we expect to engage learners and stakeholders in actions that will reduce poverty?
Conclusion

Sandra Oliveira and Amy Skinner suggest that the development education sector has not sufficiently reflected on how we enhance and sustain citizen engagement. They argue that:

“Engagement’ is a term frequently used within DEAR (Development Education and Awareness Raising) but there has been little exploration of its meaning. Little research has been done into how DEAR practitioners conceptualise ‘citizen engagement’ and how DEAR relates to the broader context within which it is being carried out” (2014: 9).

They also point to how the funding strategies for development education sometimes frustrate action outcomes as they are often project bound and fall into three year cycles. This can create a very short window of opportunity for engagement with learners on action outcomes given the period of awareness raising, content delivery and active learning needed to get to the point where they feel equipped and comfortable enough to engage actively with an issue. Moreover, meaningful education will often require a lengthy gestation period and civic outcomes may take more time to manifest themselves than that made available in a project cycle. These are challenges that practitioners need to consider in developing engagement strategies. As Oliveira and Skinner suggest:

“Although all practitioners recognise that engagement is a fundamental part of their work, very few have clearly defined engagement strategies. Rather there tends to be a focus on engaging target groups in specific actions or projects, meaning that it becomes a tactical issue, comprised of a sum of ad-hoc actions or short term projects” (ibid: 17).

This article has shown that many key stakeholders in development education, across government and non-government sectors, share citizen engagement and action as an intended outcome of the DE methodology. They have adopted the Freirean idea of praxis – reflection and action – as the
template for agreeing appropriate responses to social and economic injustices. However within the sector, the action component of DE does not appear to be adequately incorporated into the planning and delivery of projects, courses and workshops. It can either be served up as a menu of (mainly soft, transactional-based) options offered to learners at the end of an educational process or be discussed theoretically rather than implemented in practice. Or when it is factored into planning, it is ‘often short-term, activity oriented, rather than long-term, systemically oriented.’ (ibid: 18).

These weaknesses in the action component can, perhaps, be attributed at least in part to the depoliticisation of the NGO sector which has resulted in transactional and superficial forms of citizen engagement best exemplified by the Make Poverty History initiative. The action outcome cannot be separated from the strategies, advocacy programmes and policy positions adopted by the development NGOs that are the main conveyors of DE. Should NGOs fail to grapple with the structural causes of inequality then it will become increasingly difficult for citizens to take the steps necessary to bridge the widening gap between rich and poor in the global North and South. This could also result in development NGOs becoming increasingly irrelevant to the primary constituents we claim to represent – the poor, vulnerable, marginalised and oppressed.

The worrying depoliticisation of the development NGO sector was acknowledged by CIVICUS, a global alliance of civil society groups. In an open letter to ‘fellow activists across the globe’, CIVICUS offered a damning verdict on the civil society movement and its failure to address the ‘glaring inequality that sits at the heart of the new world order’. The letter said of civil society groups:

“We are the poor cousins of the global jet set. We exist to challenge the status quo, but we trade in incremental change. Our actions are clearly not sufficient to address the mounting anger and demand for systemic political and economic transformation that we see in cities and communities around the world every day.”
A new and increasingly connected generation of women and men activists across the globe question how much of our energy is trapped in the internal bureaucracy and the comfort of our brands and organisations. They move quickly, often without the kinds of structures that slow us down. In doing so, they challenge how much time we – you and I – spend in elite conferences and tracking policy cycles that have little or no outcomes for the poor.

They criticise how much we look up to those in power rather than see the world through the eyes of our own people. Many of them, sometimes rightfully, feel we have become just another layer of the system and development industry that perpetuates injustice.

We cannot ignore these questions any longer” (CIVICUS, 2014).

The urgency of this letter should spur us all on the road to change that is bottom-up, informed by the needs of those we claim to represent and propelling our citizens toward a process of meaningful action that will tackle the obscene levels of inequality that continue to plague our world.

References


Viewpoint

REVOLUTIONS OF THE POSSIBLE: UNDERSTANDING THE RISE (AND CRISIS) OF THE NEW LATIN AMERICAN LEFT

José Gutiérrez and Renán Vega Cantor

Latin America has been at the centre of the global political debate over the last two decades. Political developments, from the Zapatista uprising in 1994 to the rise of the series of so-called ‘progressive’ governments in the region, shattered to pieces both the ‘Washington Consensus’ which had emerged in the post-Cold War scenario, as well as the confidence in uncontested neoliberal hegemony characterised in Fukuyama’s (1992) assertion that history had effectively come to an end after the fall of the Berlin Wall. The cycle of radical protest in the continent, which saw an array of new social actors emerging – which challenged traditional left-wing paradigms – inspired the anti-globalisation movement and also emboldened the political left elsewhere which saw that an ‘alternative’ was indeed possible.

Two decades later, both the social movements and the ‘progressive’ governments they (sometimes) brought to power seem to be experiencing the first signs of a crisis. The latest election in Venezuela, which gave a clear advantage to the right, the rise to power of an open neoliberal government in Argentina, the ongoing difficulties in Brazil, the often sour relations in Ecuador between the government and organised social movements, the defeat of Bolivia’s Evo Morales in his bid to secure yet another re-election, are but a few signs of the possible exhaustion of this political model. The lack of sustained and significant mass movements in the continent over the last ten years are yet another sign that the escalation of mass empowerment has reached its peak and is now in decline.

The calls of Venezuelan President Nicolás Maduro, after the latest election, to re-invigorate the project, has led some to wonder what it is that
actually needs to be re-invigorated. It is with this question in mind that we need to have a sober evaluation of the lessons learned during the latest cycle of transformative protest; its strengths, weaknesses and limitations. Naturally, this is not the space to get into this task in any detail. We merely wish to contribute some ideas to a global debate on much needed alternatives, at a time when the current model of society is plunging us straight towards environmental and social disaster. We have no magic formulas, nor do we believe that they exist. We hope these few ideas may help to move the debate away from the equally damaging idealisation and demonisation so prevalent in international discourses on Latin America.

Radical roots
It is impossible to understand the most recent cycle of protest in Latin America without addressing properly the history behind it. Neither the Zapatista movement, nor Venezuela’s former president Hugo Chávez, came out of nowhere. In one way or another, both were the product of the failures of the Latin American modernising and state-making projects, firmly inscribed in the capitalist world-system from the late nineteenth century onwards. Thus, its ‘development’ was a model of dependence, lacking in internal dynamism, developing only those sectors of the economy which were of any interest to the world markets. Latin America first became connected to the world markets while imperialism was in full swing (1870s) and its first industrialisation attempts (1930s-1960s) came in a late period when they were unable to compete in international markets and had also to compete in their own local markets with a much more developed foreign industry. The crisis of the Import Substitution Model in the late 1960s – because of its lack of dynamism, the lack of capital goods, the inability to absorb the rural population which accumulated in misery belts around urban centres, etc. – together with the panic caused among the elites by the Cuban revolution in 1959, led to authoritarian responses. This authoritarianism took the form of naked dictatorships or veiled autocratic regimes, such as the restricted democracy in Venezuela or Colombia, all of them dominated by the National Security Doctrine in their fight against the ‘internal enemy’, within the Cold War context.
The authoritarian alternative, which often combined with extreme economic liberalism was enforced through authoritarian means, proving that the invisible hand of the market was often preceded by the iron fist of the military. This authoritarianism produced mass mobilisation in the early 1980s, at a time of deep recession and the debt crisis, which combined the democratic agenda with the struggle against imposed structural adjustment programmes. Examples of these mobilisations include protests in Chile (1983), the Dominican Republic (1984), and Venezuela (1989), all of which included the important participation of women who bore the bulk of the weight of the economic crisis on their shoulders. While the authoritarian governments were soon followed by democratic ones, the crisis of the socialist paradigm and the neoliberal conversion of some former leftists into technocrats (most notably in Chile, but elsewhere too), led to these democracies pushing the neoliberal agenda further forward as the only possible way to ‘develop’ Latin America.

Although many of these popular mobilisations were often co-opted or defeated, they created the basis for a new left which was to flourish at the ‘end of history’. A key element to this rejuvenation was the Sandinista revolution (1979-1990) which, in spite of its bitter end after the protracted low intensity warfare funded by the US, posed important questions on participatory methodological approaches in politics – a different ‘style’ of doing militant work, direct democratic mechanisms, etc. – which left a wealth of experience for future movements.

The 1990s began with the mass mobilisation of indigenous people – which became ‘visible’ to militants and activists after the erosion of the traditional left-wing paradigm – against the five hundredth anniversary of the ‘discovery’ of Latin America in 1992. In the first half of the 1990s it was indigenous peoples in the continent which led the first mass rebellions against the Washington Consensus: Chiapas (1994), Ecuador (1996) and the coca producers protesting against the ‘war on drugs’ imposed on rural communities in Peru, Bolivia and Colombia (1994). These protests marked the appearance not only of new civil society activists, but also of new reasons
to protest, for example against the harmful environmental effects of extractive industries, while the struggle for land gave impetus to movements for greater political autonomy and empowerment. The emergence and growth of these protest movements coincided with neoliberalism entering a phase of crisis at the turn of the century, which settled into a more urban pattern of protest epitomised by the water and gas wars of Bolivia (2000, 2003), the Argentinian economic crisis (2001), the successive Ecuadorian crises (2000-2005), and the unceremonious fall of president Fujimori in Peru (2000). The rallying cry of ‘Que se vayan todos’ (Out with them all) created an impressive community of active subjects which, bringing together all of the marginalised sectors in civil society, effectively dismantled the hegemony of technocratic rule, while proving that politics is also done on the streets.

**Not so radical results**

It is in this context of mass mobilisation and in the quest for alternatives, that the so-called ‘progressive’ governments – a term which conceals important differences between them, but which we use in want of a better label – made an appearance. The first to come to power was the charismatic Hugo Chávez in Venezuela (1998), breaking the isolation of Cuba, arbitrarily embargoed by the US. Over time, other presidents would join him, a mixture of more or less committed social democrats with links to radical sectors such as Evo Morales (Bolivia) and Rafael Correa (Ecuador), and populist nationalists with organic links to some social movements, notably Daniel Ortega (Nicaragua) and Néstor and Cristina Kirchner (Argentina). Other emergent leaders were Michelle Bachelet (Chile) and Lula da Silva (Brazil) who emerged from culturally progressive sectors and were nonetheless dogmatic neoliberals in the economic sphere. In most cases, the ascendency of the ‘progressive’ governments led directly to the demobilisation and co-optation of social movements who were turned into ideological apparatuses of the state and spokespeople for the government. An extreme example was Argentina, but in one way or another, every ‘progressive’ government restricted the independence of social movements. At the same time, all of these governments encapsulated the subjective and objective contradictions of the Latin American process, particularly the contradiction between a
radical rhetoric and the continuity of the dependant economic model based on primary export commodities, although with a redistributive twist. This contradiction make us wonder if the attempts at economic integration and political integration which have been progressively replacing the traditionally US dominated Organisation of American States, such as the Community of Latin American and Caribbean States (CELAC), Union of South American Nations (UNASUR), Bolivarian Alliance for the Peoples of Our America (ALBA), are the seeds of a definitive breakaway with dependency or the regionalisation of the Dutch disease because of their overreliance on primary commodities (primarily but not exclusively, oil).

‘Progressive’ governments managed to create much needed redistributive policies (social services, education, health, etc.), which took millions out of poverty and gave them universal literacy and health effectively for the first time in history, thanks largely to the high price of primary commodities and the subsequent influx of cash (divisas). This process meant only a relative change in relation to the orthodox neoliberal phase but was welcomed by neglected populations which, for the most part, failed to benefit from the economic bonanzas of which Latin American history has been plagued. However, it would be far-fetched to talk about post-neoliberalism: the socialism of these governments, more often than not, was aspirational, since the material bases of the capitalist system were left largely untouched. It was ‘socialism of consumption’, not at the level of production save for some isolated experiences of self-management in Venezuela or Argentina. For the most part, the question of production was framed in merely quantitative terms. The question in the struggle for production, however, is not so much how much is produced, but what, how and why we produce.

In reality, the old model of dependency and its international division of labour was never challenged, while the regional political debate was limited by short-term geopolitical considerations. Alas, the development of an economy based around the endogenous needs of hemispheric populations remains an elusive aspiration. It is assumed that geopolitical changes alone,
such as the erosion of US hegemony in the region after the defeat of the Free Trade Area of the Americas (FTAA) initiative and the meltdown of the Washington Consensus on the one hand, and the emergence of the BRICS (Brazil, Russia, India, China and South Africa) bloc of emerging economies on the other, will have an intrinsic benefit on the region. However, this is to ignore the pernicious effects of the emergent hegemons – the so-called Chinese model in particular – in terms of neat exploitation and environmental destruction, but also in terms of the vulnerabilities ingrained in the new dependency.

The rentier model of capitalism in Venezuela, for instance, has made the country extraordinarily vulnerable to the fluctuations in the price of oil and breaking this dependency model is very difficult. This is evidenced by the fact that stimulating the productive sector has been systematically frustrated by the very dependence on the oil surplus on which they ultimately rely, becoming a circular problem. As the system is primarily redistributive and intends to stimulate consumption to create a meaningful internal market, local production finds it difficult to compete with cheap imports while the whole economy is geared towards stimulating the export of primary commodities, constantly damaging the productive sector constantly in the process. To break away from this rentier model, something which cannot be done gradually, means a lot of mid-term sacrifices to see results in the long-term – not an easy task when you are trying to gain the loyalty of an electorate which does not necessarily share a commitment to the long-term project. But overall, this dependency is unsustainable and the crisis of commodity prices, which has damaged the very redistributive nature of the project, has transformed into a considerable political crisis, particularly since the economic crisis has made ever more visible the politics of rentier capitalism.

This form of capitalism is characterised by a bureaucratic web of clientelism, corruption and cronyism in a state which is populated by opportunists and technocratic ‘converts’. Although corruption was not created by ‘progressive’ governments, far more could have been done to
eradicate it. Instead the corrupting network was used to a degree in order to consolidate the model of ‘change from above’. Other ‘progressive’ governments, such as Ecuador, are a bit more protected from the fluctuations of the international market, because their productive capacity is much higher (Venezuela is an extreme case), but the current crisis has exposed the frailty of the current model and the lack of a transformative project.

**Wealth of experience, poverty of project**

There is an enormous wealth of experience accumulated over the years in Latin America, yet we have been unable to turn this experience into a transformative political, social and economic project. To some degree, we have witnessed revolutions of the possible; in a sense, every process of change needs to consider the objective constraints it faces and the burden of historical legacies. Yet, an element of imagination is needed in order to understand that the limits of the possible are wider than what we have come to believe. Breaking the straightjacket on our political imagination is a first step in order to contribute to bring about a transformative project. There are no magical formulas for addressing this project, yet there are some clues and some lessons gained from decades of struggles which are useful in this collective process.

Beyond the denunciations of foul-play from the ‘Empire’ and of neoliberalism, it is important to start thinking of strategies to overcome capitalism. It is extremely worrying to live in a time when, as Slavoj Žižek has suggested, it is easier to imagine the end of the world than it is to imagine the end of capitalism. This is particularly difficult to accept when the end of the world is most likely to come about because of the destructive nature of the current dominant economic and social model. These strategies can’t be based on mere redistribution or on the current international division of labour. It requires a challenge to both; a look at productive relations in qualitative terms based on concerted international efforts that take seriously the scale of the current global environmental, civilisational and social crisis.
The limits of the neoliberal technocratic project were made evident through mass mobilisation on the streets, showing that excluding the priorities of the majorities from the neoliberal agenda was a political issue, that the problems of Latin America were not technical but political. The problems now being faced by the rentier redistributive model of the ‘progressive’ governments and the difficulties of creating the basis for viable alternatives to the current system – sustainable, long-term alternatives that escape the above mentioned infernal cycle of dependency – are, to a large degree, technical. But this is only one-side of the story. In order to implement the technical measures necessary to break away from this rentier system, a serious process of politicisation of the masses is needed. It is at this point that the technical becomes political as well, and we move from a quantitative emphasis to a qualitative one. We need a population who understand the issues at stake and the changes that need to be implemented, that know the sacrifices and risks of every step forward in the creation of a new economic model. This process necessitates a new way of doing politics, one which needs to be profoundly pedagogic, bringing together the practical experiences of this recent wave of mass politicisation with the lessons of half a century of committed educational praxis through Freirean and Participatory Action Research approaches. This understanding is necessary for only an informed population, a people who are decisively involved and take an active part in decision-making and implementation, will develop the willingness to do the necessary mid-term sacrifices which are consubstantial to any process of change. To summarise, we need to break the mould of the citizen as a passive actor, a mere recipient of more or less benign redistributive policies, a process in which development education has a critical role to play.

Therefore, there is a need to move away from the mere formalities of representative democracy and implement real forms of direct and participatory democracy. This was one of the elements that came up at the turn of the century with the wave of protests in South America, a promising awakening quickly overshadowed by the rise of the ‘progressive’ governments. This top down politics necessarily has seen the people primarily as a base of support more than an active agent. Over-reliance on
hierarchical and personality-based leadership has thwarted the spontaneity of the processes and its mobilisation capacity, taken away ownership over it, while the streets have been abandoned to recalcitrant sectors opposed to any idea of significant change. A significant process of change requires an abandonment of the cult of electoral politics. It requires us to place the emphasis on collective leadership and to start thinking long term, beyond five year periods, in a process that develops new channels of participation and decision-making.

A failure to meet the above mentioned challenges has given the space for a new breed of technocratic leaders to emerge – best personified in the new Argentinian president Mauricio Macri – who have capitalised the mistakes of the current ‘progressive’ governments and emphasised their technocratic nature as if this would be a real solution to the limitations met by the ‘progressive’ wave in Latin America. It is not by clinging to the status quo – regardless of whether it is labelled ‘progressive’ – that we will move forward in a transformative direction, but by grasping the seriousness of the challenges ahead, abandoning easy solutions, rejecting our role as passive spectators in the political game and developing criticism as a constant companion. Recovering our capacity to imagine a different world is a first step into the process of re-articulating the transformative agenda.

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#GLOBALGOALS? THE TRUTH ABOUT POVERTY AND HOW TO ADDRESS IT

Rajesh Makwana

As the star-studded endorsements and media hype surrounding the all-pervasive Global Goals campaign begins to subside, a very different truth is beginning to emerge about this latest attempt by the international community to end poverty and create an ecologically viable future. Despite the UN’s ambitious claims, all the indications are that the Sustainable Development Goals (SDGs) do not have the potential to ‘free the human race from the tyranny of poverty and want’ or ‘heal and secure our planet’. On the contrary, the ‘new agenda for development’ fails to address the root causes of today’s interconnected global crises, perpetuates a false narrative about poverty reduction, and reinforces an unsustainable economic paradigm that is inherently incapable of reducing the true scale of human deprivation by 2030.

If taken at face value, it may seem irresponsible for anyone to dismiss the broad vision and prime objective of the SDGs to ‘end poverty in all its forms everywhere’ (UN, 2015a) – if only because it presents a valuable opportunity to improve intergovernmental cooperation and focus both political and public attention on pressing global issues. As Share The World’s Resources (STWR) have outlined in a recent report (2015), however, there are many reasons to question not only the targets themselves, but the entire sustainable development initiative and the political-economic context within which it will be implemented.

For example, one of the key concerns that emerged from the Financing for Development talks that accompanied the SDGs negotiations was whether governments will be able to raise and redistribute the huge sums of money needed to meet the goals – especially given that developing countries face an estimated annual gap of $2.5 trillion in SDG-relevant sectors (UNCTAD, 2014). Even though levels of international aid still fall far short of the 0.7 percent of GDP that donor countries have
repeatedly pledged for more than forty-five years (STWR, 2012), governments attending the financing talks failed to agree any concrete measures for redistributing more of the world’s highly concentrated wealth to protect the most vulnerable people.

Instead of agreeing to provide significantly more funding for development, donor governments pushed for countries in the global South to take greater responsibility for mobilising finances domestically (Regional Refocus et al., 2015). At the same time, they effectively refused (Oxfam, 2015) to implement any of the urgent measures that civil society has long been calling for to prevent illicit financial flows, tackle tax avoidance or restructure external debts – measures that could mobilise many billions of dollars (STWR, 2012) in additional revenue each year for low-income countries. Until these critical issues are addressed, foreign aid will continue to be dwarfed by the net flow of financial resources from the global South to the North, which suggests that in reality the populations of (resource rich) low-income nations continue to finance the development of ‘rich’ nations rather than the other way around (Kar and Spanjers, 2014).

Unwarranted importance was also placed on scaling up private-public partnerships as a way of raising finance, which is a measure that scores of campaigners and civil society organisations argue has established a ‘corporate development agenda’ that will benefit businesses far more than those living in extreme poverty. As summarised in a joint statement released by numerous civil society groups during the financing for development negotiations, ‘[the] emphasis on private financing and the role of transnational corporations will further weaken public policy space [for] governments and fails to address the unfinished business of regulating the financial sector despite the extreme and intergenerational poverty created by the global crisis’ (People’s Goals, 2015).

Another major critique widely voiced by environmentalists is that the SDGs encourage governments to maintain their obsession with putting economic growth before pressing social and environmental concerns. In
particular, SDG 8 is entirely devoted to the promotion of ‘sustained, inclusive and sustainable economic growth’, even though there is now ample evidence to suggest that relying on the trickle-down of global economic growth is not an effective way to end poverty. Many campaigners have cited (for example, Kirk, 2015) detailed projections by David Woodward (2015) (based on optimistic assumptions about future rates of global economic growth), demonstrating that it would take at least 100 years to ‘eradicate’ poverty at the $1.25-a-day level and twice as long at the more appropriate $5-a-day measure of poverty.

Far from promoting a truly ecological agenda for development, the SDGs reflect the widely recognised and profound contradiction between the pursuit of economic growth and the very notion of sustainability. Not a single country has managed to ‘decouple’ economic growth from environmental stress and pollution, and achieving any significant level of decoupling remains highly unlikely in the foreseeable future (Jackson, 2009). Indeed, evidence suggests that accelerating economic growth in order to speed up poverty reduction will result in a rise in global carbon emissions that would wipe out any possibility of keeping climate change to within the ‘acceptable’ margin of a two degrees centigrade increase (Johnson, Simms and Chowla, 2010).

**Do the poor count?**

However much we would like to believe that governments are on track to end poverty by 2030, a more detailed examination of the available data shows that the received wisdom about our economic progress is largely based on misdirection and exaggeration. According to official UN statistics (2015b), there has been a steep drop in global poverty levels over the past twenty-five years. In 1990, around half of the developing world reportedly lived on less than $1.25-a-day – a figure that reduced significantly to 14 percent by 2015. According to new data just released by the World Bank (2015), these numbers have diminished even more rapidly in recent years with as little as 10 percent of the world’s population now living in poverty.
However, there are serious concerns around how changes to the way poverty is calculated have contributed to the illusion that poverty significantly reduced as a result of the Millennium Development Goals (MDGs) (Hickel, 2014). Most significantly, the baseline year for measuring progress was shifted back to 1990 in order to include all the poverty reduction that took place (mainly in China) well before the Millennium Campaign even began (Carroll, 2014). On more than one occasion, changes to the way the poverty line was calculated meant that hundreds of millions of people were subtracted from the MDGs poverty statistics overnight.

The World Bank’s definition of what constitutes ‘extreme’ poverty is also widely regarded by economists as highly problematic. According to the Bank’s latest revision, this all-important measure is now based on an international poverty line of $1.90-a-day (previously $1.25-a-day). This exceedingly low and highly contentious poverty threshold reflects how much $1.90 can purchase in the USA but not in a low-income country like Malawi or Madagascar, as is often believed (Parsons, 2012a). It’s clear that meeting even the most basic human needs for access to food, water and shelter – let alone paying for basic medical services – would be impossible to achieve in the United States with such little money. In comparison, the official poverty line for people who live in the United States is set at the substantially higher rate of around $16-a-day.

At the very least, this behoves the World Bank and the SDGs to adopt a morally appropriate dollar-a-day poverty line that accurately reflects a minimum financial requirement for human survival. This is a view shared by the United Nations Conference on Trade and Development (UNCTAD, 2013) who argue that only by using a higher threshold of $5-a-day would it be possible to fulfil the right to ‘a standard of living adequate for … health and well-being’ – as set out in Article 25 of the Universal Declaration of Human Rights more than 65 years ago. According to World Bank statistics (http://iresearch.worldbank.org/PovcalNet/index.htm?1,0poverty), at this slightly higher level of income has consistently increased between 1981 and
2010, rising from approximately 3.3 billion to almost 4.2 billion over that period.

If the Millennium Campaign had used this more appropriate poverty threshold, MDG-1 would clearly not have been met: rather than halving the number of people living without sufficient means for survival, there are 14 percent more people living in $5-a-day poverty now than in 1990.

As ActionAid (2015) and others rightly suggest, however, a $10-a-day benchmark may be a far more realistic measure of poverty when comparing lifestyles in rich and poor countries, which would mean that an alarming 5.2 billion people live still in poverty today.

There can be little doubt that the mainstream narrative about how global poverty is being dramatically reduced distracts from the need to address its structural causes and diffuses public outrage at what is, in reality,
a worsening crisis of epic proportions – one that demands a far more urgent response from governments than the SDGs can deliver. At the very least, adopting a more realistic international poverty line would transform our understanding of the magnitude and persistence of poverty in the world, and spark a long overdue debate on how ambitious and transformative the international development agenda really is.

**Ending the global emergency of avoidable deaths**

While such critiques of UN poverty statistics are necessary to highlight the truth about global poverty levels, this still doesn’t fully illustrate what life-threatening deprivation means in human terms, especially for those of us living in affluent countries who have little or no contact with the world’s poor. World Bank figures conceal a disturbing fact about what it really means to forgo access to life’s essentials: according to calculations by Dr Gideon Polya (2014), over 17 million ‘avoidable deaths’ occur every year as a consequence of life-threatening deprivation, mainly in low-income countries. As the term suggests, these preventable deaths occur simply because millions of people live in conditions of extreme deprivation and therefore cannot afford access to the essential goods and services that people in wealthier countries have long taken for granted.

The extent of this ongoing tragedy cannot be overstated when approximately 46,500 lives are needlessly wasted every day – innocent men, women and children who might otherwise have contributed to the cultural and economic development of the world in unimaginable ways. This annual preventable death rate far outweighs the fatalities from any other single event in history since the Second World War, and around half of those affected are young children. Given today’s technological advancements and humanity’s combined available wealth of $263 trillion (Credit Suisse, 2014), it’s perhaps no exaggeration to suggest that the magnitude of these avoidable deaths is tantamount to a global genocide or holocaust.

What, then, should be our reaction to the sheer extent of life-threatening deprivation in the world, given that our combined efforts to meet
urgent human needs – as expressed by the actions of our elected governments – are tragically inadequate on a global scale? It’s surely futile to direct further policy proposals or alternative ideas to the world’s governments, who are failing to enact the emergency measures and far-reaching structural reforms that are necessary to end extreme poverty *within an immediate time-frame*. Instead, civil society groups and engaged citizens should adopt a strategy for global transformation based on solidarity with the world’s poor and a united demand for governments to radically reorder their distorted priorities.

STWR’s founder Mohammed Mesbahi (2015) has proposed such a strategy for redirecting public attention towards the shameful injustice of this growing humanitarian crisis, based on the need for governments to finally uphold the long-agreed entitlements set out in Article 25 of the Universal Declaration of Human Rights as their leading concern in the period ahead. As Mesbahi explains, the time has come for millions of citizens in every country to collectively demand the universal realisation of these basic rights – for adequate food, housing, healthcare and social security for all – until governments significantly reform the global economic system to address the root causes of hunger and needless poverty-related deaths.

With over 70 percent of the global population struggling to live on less than $10 per day, there is no doubt that a common cause for guaranteeing basic socio-economic rights across the world could bring together many millions of people in different continents on a common platform for transformative change (Parsons, 2012b). If these public protests can become the subject of mainstream political and media discussions, people from all walks of life may soon be persuaded to join in – including those who have never demonstrated before in the richest nations, along with the poorest citizens in low-income countries.

Needless to say, galvanising an informed public opinion the world over is a formidable challenge given the false mainstream narrative on poverty reduction and a general lack of popular awareness within affluent
society. But without a collective worldwide awakening to the injustice of widespread poverty amidst excessive wealth inequalities, it may remain impossible to overcome vested interests and the political inertia of governments. The responsibility for change falls squarely on the shoulders of us all – ordinary engaged citizens – to march on the streets in enormous numbers and forge a formidable public voice in favour of ending extreme human deprivation on the basis of an international emergency.

Note: This article was originally published by Share The World’s Resources on 6 October 2015 – http://www.sharing.org/information-centre/articles/globalgoals-truth-about-poverty-and-how-address-it – and is drawn from a report entitled Beyond the Sustainable Development Goals: uncovering the truth about global poverty and demanding the universal realisation of Article 25. The article is reproduced with the permission of the author.

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Resource reviews

THE INCLUSION DELUSION? REFLECTIONS ON DEMOCRACY, ETHOS AND EDUCATION

Review by Maria Barry


On 3 December 1990, Mary Robinson opened her inaugural Presidential address stating that she would be representing ‘a new Ireland, open, tolerant and inclusive’. Twenty-five years on, The Inclusion Delusion? is a timely reflection on one of these ideals, scratching the surface and delving into the dilemmas and consequences of inclusion policies and programmes within the education system in the Republic of Ireland. As the title suggests, this is a thought provoking collection of essays that problematises the concept of inclusion within education policy and practice, exposing its many paradoxes and contradictions. The views and perspectives represented in the book reflect a broad range of disciplines and areas of educational practice including; philosophy, psychology, science, assessment, teacher education and religious education. It is a considered and critical analysis of a broad range of issues related to inclusion, going so far as to ask fundamental questions regarding the value of inclusion as a desirable response to diversity.

The book is presented in five distinct sections: Dialogue and Dissent; The Inclusion Delusions?; Re-framing Inclusion: Alternative Perspectives; From Science to Religion: Neutrality and Blindspots; and finally, Silence, Invisibility and Exclusion. The themes are far reaching, at times cross cutting but, perhaps most of all, challenging. While the overall purpose of the book is to provoke and stimulate a deeper level of conversation related to inclusion, the book also offers the reader: reflections
on how educational policy and practice has progressed in relation to inclusion; an exploration of hot topics such as schools admission policies; and an insight into some of the unintended consequences of inclusion policies on practice. Alternative approaches are also considered. While it is unclear who the intended audience for this book is it will be of interest to those not only involved in inclusion related matters within education but also those who seek to understand how policy realisation can give rise to both intended and unintended consequences.

For the purposes of this review, I will explore each section in brief. I am conscious that such a brief review will not reflect the level of insight and depth revealed in each of these essays. Rather, I hope to identify some of the key areas explored and the common themes amongst them. In Section One: Dialogue and Dissent, Bonfield, Eilis O’Sullivan and Carol O’Sullivan provide the foundations for the book in a sense, offering both a historical and philosophical take on inclusion, reminding us that though currently topical, this not a new educational concept or aspiration. Each author in the next section, The Inclusion Delusions?, explores inclusive programmes or approaches, problematising their impact on inclusion. Griffin focuses on the Special Needs Assistant (SNA) programme within schools to highlight some of the more troubling aspects of this classroom-based programme and what it means for inclusion. Supported by a number of studies, Griffin suggests that rather than enhancing inclusion in the classroom, the SNA scheme has been found in some cases to increase dependency and in fact isolate children from their peers. She proposes moving from the idea of integration to inclusion.

Ryan problematises differentiation through previous studies and highlights that as an inclusive approach, it can be practised in very different ways with different outcomes, intended or otherwise. Whilst she suggests differentiation has become one of the ultimate tools for inclusion in the classroom, she explores an alternative approach, the Universal Design for Learning, which focuses more on learning and less on difference. O’Sullivan and Birch highlight challenging behaviours amongst students as a complex
area that is broad in terms of both nature and needs. They recommend as a starting point a whole school approach, rather than singularly focusing on the needs of the individual. Otherwise, they also imply that the resultant is to separate and ‘Other’ rather than achieving inclusion.

Section Three stands apart from the other essays in this book as it goes beyond current policies and practices and offers alternative approaches. Dolan proposes the holistic framework of Education for Sustainability as an approach that is interdisciplinary and inclusive of several aspects of learning. Lyons presents a developmental perspective of emerging adulthood to suggest that we can contribute to an inclusive mindset by supporting student teachers to explore and understand the diversity within their own identity and the identity of others. Finally in this section, Grogan & Ryan propose formative assessment as a means of actively engaging and involving students in their own learning.

The collection returns to areas and issues more traditionally associated with inclusion in Section Four. Here, Science, Religion and Neutrality make somewhat unlikely bedfellows. Liston focuses on stereotypes associated with both science as a subject and scientists themselves as barriers which exclude some from participation in or choosing science as a subject in school. She concludes that it is ultimately societal attitudes that foreclose an interest in science for many. O’Connell reminds us that when it comes to inclusion we are not starting with a blank canvas in the educational arena. Using the backdrop of the Forum on Patronage and Pluralism and its recommendations, his essay explores neutrality in education, pluralism, Catholic identity and the concept of the common good.

In the powerfully named final section, Silence, Invisibility and Exclusion, Canny introduces us to the teacher as a case for inclusion. Using an equality framework developed by Baker (2004), Canny explores two key areas for particular analysis here, sexuality and religious orientation. Highlighting structural barriers and feelings of isolation expressed by some teachers regarding their identity, Canny makes a strong case for the need to
consider teachers in the inclusion debate. O’Donnell brings this collection of essays to an end, with a strong response to the book title’s question and an invitation to consider other ways of being inclusive and doing inclusion. She critiques concepts of inclusion that reify difference, are based on tolerance or the notion of ‘welcoming’. Instead she offers the argument that inclusion needs to start with a recognition of plurality and focus on the concept of participation.

Perhaps part of the inevitable fate of The Inclusion Delusion? is that the critical reader left reflect on who has been omitted. While one book cannot be expected to comprehensively include all, I wonder if the cultural diversity of the contributors to the book could have been extended. In addition, I suggest too, that the agency and value of the child’s and young person’s voice as a contribution to educational thinking and reform should be recognised. This relates not only to their right to actively participate in issues related to their lives (Waldron, 2006) but also their inclusion acknowledges their presence and power (Cook-Sather, 2006). Notwithstanding this, The Inclusion Delusion? offers many responses to its opening question, reflecting on how far policies and programmes have come, naming the structural barriers that continue to pervade the area and in highlighting the paradox and peril of embracing a nebulous if noble concept.

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THE CRITICAL GLOBAL EDUCATOR: GLOBAL CITIZENSHIP EDUCATION AS SUSTAINABLE DEVELOPMENT

Review by Majella McSharry


Set against the backdrop of a personal, professional and political (auto)biographical journey, this text represents an attempt to establish a framework for critical global educators. Acutely aware of her upper-middle-class upbringing, the author’s ontological perspective is significantly shaped by her parents’ interest in education, quest for knowledge and engagement with literature. Working as a linguist and teacher, Ellis became increasingly invested in theory and simultaneously critical of the social inequalities that remain unchallenged by teachers and learners who are silenced and disempowered by instrumentalist, neoliberal education systems. The author adopts the acronym GCESD not to combine global citizenship education and sustainable development but to conceptualise global citizenship education as sustainable development. Immersion within theoretical sociology, psychology, philosophy, theology, anthropology, history and science roots the global citizenship educator within critical realism, eliciting the potential for truly open, radical and sustainable transformation and development. Sustainable development thus emerges as a mind-set from trans-interdisciplinary engagement with theories that form the tapestry of human development. Cultural historical activity theory (CHAT) provides a methodological framework through which transformation can be realised.

For Ellis, a negative impact of globalisation is the dominance of Euro-American corporate, military and industrial governance that has become the ultimate arbiter of knowledge, prioritising short terms goals over long term investment in liberal education and academic freedom. Such knowledge, assumed to be neutral, in reality espouses an imperialist language that is ill understood by many of its indigenous consumers and completely
void of their valuable contributions. Well-regarded OECD (Organisation for Economic Co-operation and Development) states act as guardians for offshore assets, protecting the very system that receives its lifeblood from terrorism and corruption, while media organisations use glossy images of disaster and abuse for their own capital gain. Critical citizenship education enables a critique of even the most seemingly worthy policies and practices, empowering learners to access alternative perspectives and to experience global democracy through globally networked communities.

Lack of philosophical and theoretical grounding that denies global citizenship education (GCE) a genuine status, as well as fragmented policy and initiatives, are identified as key barriers to unleashing the transformative potential of the GCE. Media literacy, environmental sustainability and engagement with controversial topics are features of citizenship studies curriculum in the UK that align productively with such transformative potential. However repeated studies of initial teacher education have revealed ‘acceptance, obedience and uncritical patriotism; reluctance to address sensitive, complex issues; teachers craving further knowledge, training and expertise; and indeed, specific absences of economic and political literacy related to government and the EU’ (33). Keen to take up these issues empirically through critical ethnography, the author embarked on a sustained period of research involving surveys, focus groups and interviews with pre-service and in-service teachers, teacher educators, academics, and INGDO (international non-governmental development organisation) and DEC (development education centre) administrators.

Undoubtedly resonating with her own personal journey, she identifies ‘deep frames’ (63) formed in childhood as shaping an individual’s being, thinking and seeing and, as educators, ultimately shaping their propensity to unquestioningly accept knowledge or to critically probe it. The findings suggest that in spite of educators’ positive and committed ontological framing of global education, narratives frequently avoided theoretical discussions. While they celebrated potential transformation, many head teachers and subject teachers remained uncertain of their role in
bringing this about and unable to justify their own purpose. Their eagerness to position themselves as politically neutral, evidenced a lack of critical awareness of teaching as a political act in and of itself where curriculum and pedagogy are culturally shaped making social and political neutrality a mere illusion. Engaging with theories such as systematic functional linguistics (SFL) (52) would enable educators to critically identify personal interpretation and political orientation of supposed discourses of truth. Theoretical, multi-model approaches were evident amongst many academics and INGDOs but this lessened amongst teacher educators who blamed the sanitisation and dilution of theoretical input on structural, financial and temporal constraints of the university.

For Ellis, global educators grounded in critical theory will be continually stimulated to undertake rigorous action research aimed at acquiring personal knowledge in the social world; subsequently moving from consumers to producers of knowledge. This further motivates educators to participate in cyber-alliances and ‘collaborative multi-stakeholder COPxs that promote GCESD’ (73). These alliances have the potential to critically interrogate the likes of ‘attention philanthropy’ (28) and so-called corporate responsibility and act as evaluative global monitoring movements providing real and tangible support for global democracy and GCESD.

Although stimulating and energising, this text is at times challenging to access and bewildering to process. Ellis’ love of linguistics and trans-inter-disciplinary theory simultaneously facilitate and obfuscate the central tenets of the book. The layout of the text follows that of a traditional research dissertation moving from personal impetus to theoretical, philosophical and political frameworks to an exploration of methodology and findings and ultimately to key recommendations. This format lends itself to a sense of repetition that a more integrated approach might have avoided. Nevertheless Ellis provides signposts throughout the text in an attempt to assist the reader to move through genres. Overall this book offers an insightful window into the emancipatory potential of GCESD. The author’s insistence on the transformative capacity of global education that is aligned
with academic disciplines and rooted in philosophical and theoretical frames, resonates with the foundations and aims of the new *Politics and Society* programme for senior cycle in the Republic of Ireland (introduced from September 2016), generating a certain excitement about its transformative potential. Ultimately, this text sets out an optimistic framework for mainstreaming GCESD through critical teacher ‘education’ (as opposed to training), Continuing Professional Development (CPD) and the formulation of appropriate critical alliances.

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**THE PEOPLE OF THE ABYSS**

Review article by Stephen McCloskey


The descent

In the summer of 1902, the great American writer, journalist, and social activist Jack London undertook an immersive research project in the coalface of poverty in the East End of London, the belly of the first industrialised nation. Fresh from his adventures in the Yukon goldrush that would inspire his classic adventure novels *The Call of the Wild* and *White Fang*, London’s immersion coincided with the coronation of a new king Edward VII. The splendor and decadence of this state occasion only accentuated what he witnessed and experienced as a yawning and terrifying social gulf between the privileged and dispossessed. London’s undertaking – thirty years before Orwell conducted a similar exercise in *Down and Out in Paris and London* – produced a searing, powerful and, at times, haunting account of raw capital colliding with the vulnerable poor to devastating effect. Working from court and press reports and official state data, he finds that one in four adults is destined to die on public charity ‘either in the workhouse, the infirmary or the asylum’ (120). Life expectancy in the East End is thirty years with 55 percent of children dying before the age of five (195).

From the outset, London presents his journey and that of his cohabitants in the East End as a ‘descent’ into a hellish, miserable existence – an abyss – from which there is no recovery or reprieve. As the film-maker and writer Iain Sinclair says in his introduction to this new edition of London’s text: ‘The people he encounters are Morlocks, creatures denied the light. They are as sullen and defeated like the deformed subterraneans depicted by H. G. Wells’ in *The Time Machine* (n.p.). London’s hesitant hansom cab driver feels that his passenger has lost his bearings and worries about his fare. London picks up a suit of rags and sews a gold sovereign into
the armpit of his jacket for ‘emergencies’ and takes lodgings on the edge of
the abyss where he can return for sanctuary when needed.

Housing crisis
The devastating poverty witnessed here has obvious underpinnings: workers
pay between one quarter and a half of their weekly income in rent and the
rooms they occupy are unfit for animals, much less adults and children.
London reports that there are ‘300,000 people in London, divided into
families, that live in one-room tenements’ (161) and a total of 900,000 live
illegally in an area less than 400 cubic feet (ibid). Should the Public Health
Act be properly enforced, he suggests, 900,000 people would be served with
a ‘notice to quit’ (162). He reflects here on a visit to a tenement: ‘there were
seven rooms in an abomination called a house. In six of the rooms, twenty-
odd people of both sexes and all ages, cooked, ate, slept and worked. The
men sweated in one room measuring 7 foot by 8 making shoes in an area in
which they could barely stand’ (57). They work ‘12, 13, and 14 hours a day’
with ‘tacks flyin’ out of mouth like from a machine’ and their teeth as
evidence were ‘coal black and rotten’ (ibid). Poor light, sanitation,
dampness, vermin, lack of ventilation and personal privacy created
environmental squalor that destroyed the moral and physical conditioning of
decent hard-working people.

A coroner’s inquest into the death of a 75 year old woman heard
from a witness to her wretched condition:

“There she lay in the mortuary shell, so starved and emaciated that
she was a mere bundle of skin and bones. Her hair, which was
matted with filth, was simply a nest of vermin. Over her bony chest
leaped and rolled hundreds, thousands, myriads of vermin” (165).

Such was the inadequacy of available housing stock, houses were ‘let and
sub-let down to the very rooms with the working man paying proportionately
more for his lodgings than the rich man for his spacious comfort’ (166). This
sub-letting reached its ultimate extreme with the leasing of beds in ‘doss
houses’ whereby a ‘three relay system’ leases a bed to three workers so that it
never ‘grows cold’. Each ‘tenant’ occupies the bed for eight hours before vacating it to another worker and so on. Health officers reported common instances of three people in a single bed and two adults sleeping underneath the bed in a room with a cubic capacity of 1,000 feet (ibid). But occupiers of rooms and beds were in so many respects the most fortunate of those encountered. London spends a night ‘carrying the banner’ or tramping the streets with no peace to be had in doorways or on benches. The law of the time forbade sleeping at night which meant that ‘coppers’ shone lanterns into every nook and cranny to rouse the sleeping homeless. On a wet night the homeless walker – soaked to the bone – will be on a rapid road to a broken constitution, particularly the elderly. When public parks open in early dawn, the homeless are stretched out on grass, dry or wet, like corpses.

The spike
Respite from the streets is sought in the ‘spike’, also known as the ‘casual ward’, ‘a building where the homeless, bedless, penniless man if he be lucky may casually rest his weary bones and then work like a navvy next day to pay for it’ (62). The thought of dependence on the spike keeps the workers toiling all hours of the day as the combination of ill-nourishment and exposure hastens a broken health and worse. On entering the spike, inmates receive six ounces of bread (like a brick) and a pint of skilly (oatmeal mixed with hot water). They bathe in the same water and sleep in the vermin-ridden conditions akin to those in the tenements. But ‘charity’ comes at a price and the next day the men are set to breaking stones, disposing of dangerous hospital waste or picking oakum – occupations associated with prison life suggesting how poverty was criminalised at the time. When an opportunity arises to flee, London recognises that the men around him have been cowed by authority and fearful of losing future access to this most jaundiced form of relief.

In moments of reflection in the spike, the men ‘ascribe their homelessness to foreign immigration, especially of Polish and Russian Jews who take their places at lower wages and establish the sweating system’ (87). The inmates round on a man who suggests that the wife and children of the
immigrant living on lower wages will be assailed by conditions worse than their own. For his part, London sees the social decay of the East End as the result of gross inequality of wealth; 500 hereditary peers own one-fifth of England and spend a ‘wasteful luxury’ of 32 percent of national wealth (115). He also takes aim at appalling working conditions which result in men becoming ‘caricatures of what physical men ought to be’ and children are ‘twisted out of all shapeliness and beauty’ (169). He champions working women often left to carry the entire family on a pittance after the ‘thing happens’ – an industrial accident or illness strikes down the husband – and leaves the mother to feed an entire family on what she can earn from home. A letter is cited from a working woman to a police court missionary dated 18 April 1901:

“Sir: Pardon the liberty I am taking, but having read what you said about poor women working fourteen hours a day for ten shillings per week, I beg to state my case. I am a tie-maker, who, after working all week, cannot earn more than five shillings, and I have a poor husband who hasn’t earned a penny for more than ten years” (157).

**Occupational illness**

Then there are occupational illnesses to which women, as well as men, are regularly exposed such as ‘wet feet and wet clothes’ in the linen industry causing bronchitis, pneumonia and rheumatism. There is potter’s dust that settles over years on the lungs and reduces breathing till death, or steel dust, stone dust, clay dust, alkali dust, fluff dust and fibre dust that kills ‘like machine guns’ (195). The book humanises those lost like Harriet A. Walker:

“a young girl of seventeen, killed while leading a forlorn hope on the industrial battlefield. She was employed as an enameled ware brusher, wherein lead poisoning is encountered. Her father and brother were both out of employment. She concealed her illness, walked six miles a day to and from work, earned seven or eight shillings per week, and died at seventeen” (196).
We are unsurprised when London ventures that ‘The cases of out of works killing their wives and babies is not an uncommon happening’ (123) because this ‘chronic condition of misery’ is never wiped out, even in periods of greatest prosperity.

**Today’s people of the abyss**
The question for today’s reader of Jack London’s text is what value can we draw from it in the context of contemporary society? Is the book a time capsule from a bygone era from which we can learn ‘how it was’ rather than ‘how it is today’? Iain Sinclair’s introduction sides very much with the latter perspective suggesting that the book demonstrates:

> “the fault lines of what we are presently experiencing: empty Babylonian towers of spectacular hubris overshadowing rough sleepers, who must remain invisible under foot, or find themselves banished to hobo camps under motorway spurs, treated to one-way tickets to dying seaside resorts” (n.p.).

Yes, undoubtedly, the century that has lapsed since the publication of *The People of the Abyss* has brought levels of unanticipated material and technological advancement and, yet, so-called ‘developed’ societies remain scarred by serious levels of inequality. In my home city of Belfast, five homeless people have died in a three month period (January to March 2016), most recently Catherine Kenny, a 32 year old woman with addiction problems (*Belfast Telegraph*, 23 March 2016). Participation and the Practice of Rights (PPR), a Belfast-based human rights organisation, found that from October 2014 – October 2015 a total of 21,386 benefit claimants were sanctioned; meaning that their benefits were withdrawn under a new more stringent and often arbitrary welfare system (PPR, 2016). The withdrawal of one benefit can mean the loss of all welfare assistance, including housing benefit, which in turn means claimants are sometimes forced on to the streets.

In the south of Ireland, 3,885 adults were living in emergency accommodation at the end of January 2016 such is the lack of affordable housing to rent. This total included 884 families, of which 577 were single
parent families (DECLG, 2016). This problem is compounded by the ‘recent hospitality extended to vulture funds in Ireland’ which are buying up housing loans from banks and serving tenants with notices to quit (Storey, 2016). And in England, the homeless charity Crisis has found that 275,000 people approached their local authority in 2015 for ‘homelessness assistance’ and, in London alone, ‘7,581 slept rough at some point in 2014-15, a 16 percent rise on the previous year’ (Crisis, 2016).

While the levels of deprivation today in terms of life expectancy, the condition of housing and the working environment have greatly improved from the days of the ‘abyss’, many of the issues tackled by Jack London’s book persist. We still have gross inequality, high levels of poverty among the working poor, limited social mobility and job insecurity through measures such as zero hour contracts. Oxfam (2016) has reported that 62 individuals own as much as the poorest half of the world’s population so while we have travelled far in terms of development indices over the past century we appear to have learned little about wealth redistribution.

Tangerine Press has done us all a great service in re-publishing The People of the Abyss with a series of original photographs taken by the author that complement his impassioned prose. It is a vital social polemic imbued with humanity and written with a compassionate eye that reminds us of the responsibility we all have to ensure that national wealth is invested in social need and protecting the most vulnerable around us. As Rosita Sweetman (2016) said of the book:

“People of the Abyss shows how far we have come, but also the dangers of a new abyss yawning as global capitalism dumps unions and enforces zero-hour contracts, and the global arms industry’s bombs drive millions from their homes”.

References


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