

Civil society and national education policy: a literature review

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List of acronyms

ASER	Annual Status of Education Report
CSO	Civil society organization
EFA	Education For All
GCE	Global Campaign for Education
GPE	Global Partnership for Education
MDG	Millennium Development Goal
NEC	National Education Coalition
NGO	Non-governmental organization
PAL Network	People's Action Learning Network
SDG	Sustainable Development Goal
TaRL	Teaching at the Right Level
UPE	Universal Primary Education
WEF	World Education Forum

1. Introduction: aims and focus of the literature review

Overview

Despite the prominence of civil society advocacy on education since the 1990s, there is limited consensus about the nature of its role in shaping national policies in the global South. As the shrinkage of civic space in the past decade is likely to have altered the terms of civil society engagement in education policy, the aim of this literature review is to provide an analytical overview of the role played by civil society in national education policy, to take stock of the evidence about how civic action has shaped education policy in the past, and to understand the possible impacts on national education policymaking should the space for civil society advocacy on education be restricted in the future.

This review is focused on analysis of civil society activism at the national level, although in understanding national influences, it is necessary to take into account transnational actors and processes. Specifically, it aims to answer questions about: a) the range and character of the civil society actors and coalitions that influence national education policy; b) the activities and mechanisms through which they influence policy; and, to the extent possible; and the c) focus and contributions of civil society mobilization, advocacy, research or other activities to education policy in the global South.

The focus on civil society activism at the national level positions the focus here between two related bodies of literature. The first is the politics of national education policies and their implementation (Ansell 2010; Hickey and Hossain 2019; Levy et al. 2016; Kosack 2012). This literature recognizes that the nature and extent of national political elite commitment and state capacity drive public education policy and provisioning. Moving beyond assumptions that democratization (Ansell 2010; Stasavage 2005a; Brown 1999) and economic development (Busemeyer 2014; Busemeyer and Trampusch 2011; Hall and Soskice 2001) drive the demand or supply of education, this literature identifies relevant variables at work, including the demand for skills within the global economy; the nature of existing political and educational institutions; elite incentives to shape processes of socialization and skills development in the population; and whether and how political entrepreneurs forge social and political coalitions in support of education reforms (Paglayan 2021; Ansell and Lindvall 2013; Ansell 2010; Kosack 2012; Grindle 2004). However, this literature offers limited insight into whether and how civil society and social movements have contributed to elite commitment and state capacity on education, despite their visible presence in agenda-setting campaigns and policy debates.

The second body of literature in relation to which this review is positioned is on transnational civil society advocacy and activism on global education policy (Tikly 2017; Magrath 2015; Beardmore 2012; Croso 2012; Verger et al. 2012; Menashy 2016; Moutsios 2010; 2009; Robertson et al. 2007; Peppin Vaughan 2019; Mundy 1998; Mundy and Murphy 2001; Mundy 2007; Buchert 1995). The literature on transnational advocacy coalitions traces the effects of relatively coherent platforms representing broad constituencies across countries and world regions, showing where these succeeded in establishing norms and standards at the global level; explores the nature of transnational civil society groups and actors and their interests in shaping global policy discourse and practice; and analyses power relations within and between civil society groups at local, national and transnational levels.

The present review focuses on what happens in countries, paying attention to the political conditions shaping both civil society and national policymaking, as well as the transnational interactions with national civic activism. With some important exceptions of country case studies that explore civic activism around national education policy (Novelli and Verger 2012; Cortina and Lafuente 2018b; Edwards and Brehm 2015; Rambla 2014; Rappleye 2011; Unterhalter and North 2011b; Bhatta 2011; Bajaj and Kidwai 2016; Mundy et al. 2010; Rosser and Joshi 2018), evidence of the roles played by civil society actors in advocating for national education policy has been more limited, and its lessons scattered and divided across diverse policy trajectories, political contexts, and thematic and disciplinary bodies of literature. The aim here was to synthesize findings from the published, grey and organizational literature.

Approach

Scholarly and ‘grey’ or unpublished research by civil society actors or program evaluators take different approaches and have different standards to research methodology, concepts, and analysis, and both need to be drawn on to arrive at broad, explanatory frameworks. For published and scholarly material, we conducted an exhaustive online search using Google Scholar and databases of published material using keywords identified through trial and error, and with the help of academics and practitioner-experts. Work that cited prominent scholarship was also reviewed and potentially relevant studies followed up on. Literature searches took into account the multiple terms and different ways in which civil society actors have been conceptualized and labelled over time. For ‘grey’ material, we undertook purposive institutional searches and pursued specific leads through direct contact with researchers, and asked a panel of expert advisors for further leads.

We specifically sought out studies addressing the following:

- i. Historical studies of non-state actors engaged in education provision or advocacy in any global South contexts, including faith-based groups and social movements such as labor and women’s rights movements.
- ii. Studies of civil society activity in relation to country engagement with global policy agendas such as the Education For All movement, the Millennium Development Goals, and the Sustainable Development Goals. This included material on transnational as well as national civil society activism, in recognition of how these are often mutually formed and informed, and aimed to understand how national civil society agendas emerged and were advanced through global platforms and spaces, and in relation to national commitment to global policy goals and processes.
- iii. Studies of civil society action on national policy and in relation to the national politics of education, including attention to teacher unions, broad-based social and political movements in which education and other public service delivery are key issues of debate, and the ways in which non-state actors like domestic NGOs and faith-based groups interact with political competition over education policy.
- iv. ‘Grey’ or unpublished literature, particularly reports, evaluations, and reviews of civil society action on education policy, to be identified through hand-searches of institutional websites and repositories, and through advice from experts and practitioners.

Organization and content of the paper

This paper has five sections besides the introduction. The next section describes the main actors and institutions involved. Then, there is a section on the various political contexts in which these interactions between civil society and educational authorities have occurred. After that, the role of international agencies is analyzed, with particular emphasis on the generation of development objectives. The fifth section focuses on the thematic areas for civil society activism and advocacy. Finally, the paper discusses civil society strategies.

2. Actors and institutions

Transnational advocacy networks of civil society organizations

Transnational and national civil society actors are identified as integral to education policymaking in the global South beginning with the 1990 Jomtien World Conference, continuing through the 2000 World Education Forum (WEF) in Dakar and subsequent Education for All (EFA) aid agenda (Mundy and Murphy 2001). Most recently, the Education 2030 Framework for Action, which sets out the agenda to achieve the fourth Sustainable Development Goal (SDG4) in support of quality education for all, note that effective coordination requires ‘the support of all stakeholders, including non-state actors’ ([UNESCO](#) 2015, 60).

Historically, non-state actors and civil society organizations (CSOs) working in the education field have focused on service delivery and implementation, in tandem with or in place of the state’s public education (Gali and Schechter 2021). This is especially the case for faith-based groups and local and international non-governmental organizations (NGOs) as providers of education services for the most excluded and marginalized learners (Rose 2009; Archer 2010). Mundy and Murphy (2001) note the limited nongovernmental activity in education in the mid- to late-20th century during the period of economic crisis and structural adjustment, until the ‘remarkable explosion’ of non-state and NGO activity in the late 1990s (pp. 97). NGOs and CSOs played a range of roles in education service delivery, such as non-formal education provision, financing and fundraising, and, increasingly, advocacy (Rose 2009; Archer 2010).

The scope and mandates of CSOs in education shifted significantly in and particularly at the end of the 1990s, during the period marked by the establishment of the Education for All declaration (Novelli and Verger 2012; Chabbott 1998; Buchert 1995). Civil society included formal and informal groups working at transnational, regional, national and local levels. The most prominent, beyond NGOs, are global and national coalitions, teachers’ unions, and transnational advocacy networks and movements.

Education advocacy by transnational and national advocacy coalitions has been enabled in part due to education fulfilling the “three necessary conditions to be considered a so-called ‘global political priority’” (Novelli and Verger 2012, 9): 1) public support from international and national leaders; 2) policies drafted and enacted by international organizations such as the EFA global action framework; and 3) availability of multilateral and bilateral resources from global governance entities such as the Global Partnership for Education (formerly the Fast Track Initiative) and the World Bank (Menashy 2016; Mundy 2007). The increased presence of CSOs in education advocacy was also enabled by the EFA and its creation of more favorable political opportunities (Magrath 2015; Tarrow 2011; Gaventa and Mayo 2009).

Transnational advocacy networks (TANs) have been prominent in educational advocacy and governance (Mundy and Murphy 2001; Mundy 2007; Novelli and Verger 2012; Magrath 2015). TANs are defined as “voluntary, reciprocal, and horizontal patterns of communication and exchange” (Keck and Sikkink 1999, 90). In contrast to states or corporations driven by security or economic concerns, TANs are self-formed coalitions working within a system of shared values, discourse, and knowledge for the promotion of a shared norm, such as quality and free education for all (Mundy 2010).

The best-known and arguably most successful education TAN is the Global Campaign for Education (GCE), founded in 1999 during the World Education Forum in Dakar by two international NGOs – ActionAid and Oxfam – as well as Education International (a transnational network of teachers’ unions) and the campaigning anti-child labor movement, the Global March Against Child Labour (Mundy and Murphy 2001; Archer 2010; Novelli and Verger 2012). The GCE mobilizes people and organizations at the global, regional and national level in a campaign for the right to quality and free education for all (Gaventa and Mayo 2009). Their mission was developed in closely alignment with the Education for All aid agenda:

Education is a basic human right, and our mission is to make sure that governments act now to deliver the right of everyone to a free, quality, public education ([GCE 2023](#)).

Representing over 100 organizations, GCE has supported the establishment and growth of national education coalitions (NECs) across the globe through regional coalitions: ACEA (Arab Campaign for Education for All), ANCEFA (Africa Network Campaign for Education for All), ASPBAE (Asia South Pacific Association for Basic and Adult Education), and CLADE (Latin American Campaign for the Right to Education). Gaventa and Mayo (2009) emphasize how effective GCE has been in its inclusive framing of issues and messages for education advocacy, as well as working across levels:

While there are power differences across actors in different spaces, there was a surprising tendency amongst actors at every level to see action in local, national, regional and global spaces as re-enforcing rather than replacing or competing (Gaventa and Mayo 2009, 31).

National education coalitions are an example of what Tarrow (2006) describes as a medium-term ‘campaign coalition’, which “combine[s] the virtues of informality with the intensity of commitment offered by issue specificity” (ibid, 59). Most of the national and regional coalitions working with GCE have received financial and technical support from the former Civil Society Education Fund (CSEF, now known as Education Out Loud), funded by the multilateral Global Partnership for Education (GPE) (Rambla et al. 2017). National education coalitions often consist of a central secretariat (typically but exclusively in the capital city) and sometimes regional offices and a network of national and international NGOs and CSOs seeking to collectively advocate for quality education for all.

National education coalitions are often characterized by government and international donors as the representative or ‘voice’ of civil society in education planning, policy dialogue, and monitoring ([GPE 2023](#)). However, several NECs were set up to advance the EFA goals

nationally, and may reflect funders' beliefs about the role of civil society more than national drivers of change in a particular country:

Dakar was instrumental in the formation of many national education coalitions. The enthusiasm and degree of support offered by funders runs the risk of coalitions being established because of international actors' belief in their value, rather than emerging from the enthusiasm and conviction of national civil society. In and of itself, this is not necessarily a bad thing, but those involved in coalitions would do well to comprehend the motivating forces behind the existence of a coalition (for those already involved in one) or for setting up a coalition (if this is the intention) (Tomlinson and Macpherson 2007, 15).

The capacities and resources of NECs vary greatly across contexts (Coventry and Gebremedhin 2022). GCE and regional coalitions' efforts frequently focus on strengthening the capacity of national coalitions, in particular with respect to capacities for research and advocacy (Mundy 2012). Rambla et al. (2017) identify the factors needed to enable advocacy by coalitions:

[A] virtuous combination of international recognition plus improved capacity, research, and advocacy, enabled NECs, first, to be recognised by governments; second, to gain access to key spaces of agenda-setting and decision-making; and third, to contextualise the global EFA goals in meaningful terms for national political actors. Crucial to this cumulative circle is the energising effect of advocacy underpinned by research (ibid, 861).

Capacity and influence of national education coalitions do not necessarily equate to measurable impact, and the extent to which civil society caused or contributed to policy change remains an open question in most cases. Although the situation may have been worse had civil society not been present and equipped to campaign on it, few countries have made adequate budgetary allocations or received sufficient aid to fund their commitments to EFA or MDG2. As Mundy notes: "despite the rapid expansion of both [GCE's] global advocacy and national coalition building efforts since 2005, there has not been a substantial increase in aid for basic education or public expenditures" (Mundy 2012, 29). Part of the strategy of these coalitions is to secure international pressure and use the international development cooperation architecture to mobilize their demands, using their representation in international civil society bodies of the United Nations system, allowing them to aggregate national demands in international campaigns (the World Education Week and other strategies).

Some less-established national education coalitions appear to have struggled to localize the global EFA and MDGs for their country context, as a result of which, education coalitions:

[R]emain caught between the complex terrain of national political engagement and the expectations of global agendas due in large part to the circumstances of their creation, their marginalized role in decision making, and their ever growing financial dependency (Strutt and Kepe 2010, 370).

National 'ownership' of the advocacy agenda has been important to the effectiveness of the national education coalitions: the ambitions of the Ghana National Education Campaign Coalition, for instance, have been partly thwarted by the fact that the aims and approaches have

been overly influenced by external actors (van der Plaats 2012). By contrast, the national education coalition in India enjoyed more success in building on the lessons and tactics of GCE's advocacy agenda in a domestically-driven agenda for achieving education for all (Grant 2012). National education coalitions that succeeded in establishing broad constituencies, including recruiting teacher unions in their campaigns, tended to have more impact on education policy; but there is a delicate balance between policy dialogue with governments and engaging teacher unions in advocacy and activism:

[C]ivil society organisations must carefully walk the line between participation in government or development partner-lead processes that, by their nature, legitimise those processes, and participation that pushes for more socially just policies, though this is often a delicate balance” (Edwards, Brehm, and Storen 2018, 18).

Teacher unions

Most national education coalitions have sought the presence of teachers' unions, especially when national advocacy agendas are centered around the expansion of free, public education (Robertson et al. 2012):

In the process of building education coalitions, the relationship between teachers' unions with other sections of civil society is particularly relevant. Teachers' trade unions, as representatives of members largely within the public sector, have a tendency to be driven both to defend their members' interests, but also to some notion of 'public education'. In the current climate of neoliberal educational reform this is something that often forces them into conflict with the state and into alliances with other sectors of civil society (Novelli and Verger 2012, 5).

The dynamics between education-based CSOs and unions are often complex, particularly due to concerns such as the greater likelihood of inclusion of NECs in policy dialogue by government (in contrast to unions), service delivery outside of public education systems, and teacher accountability concerns (Archer 2007). One example is the NEC in the Philippines, known as E-Net (Hoop 2012). E-Net has built strong relationships with the multiple teachers' unions working across the Philippines, which, according to Hoop, may have been facilitated by the fragmentation of the unions that prevented any organization from becoming too influential. The national education coalition in India has similarly successfully included the three most prominent teachers' unions, which in total include a membership of more than five million teachers across India (Grant 2012). However, the sheer number of teacher union members within the NEC sometimes contributed to an 'us and them' mentality between NGOs and teachers' unions within the coalition.

Additionally, tensions between NGO-dominated coalitions and teachers' unions may arise if there are disagreements regarding the approach to engagement with government. For instance, the national education coalition in Ecuador experienced significant tensions with the national teachers' union (the Unión Nacional de Educadores, UNE) as a latecomer to the existing monopoly of education influence between the state and UNE (Sarfaty 2012). The civil society education in Cambodia similarly did not established a formal relationship with the national teachers' union due to differences in government engagement strategies, as the union “aggressively confronts the government in the media and through protests”, in contrast to the civil society

coalition's strategy of constructive engagement (Edwards, Brehm, and Storen 2018, 184). Tensions between NGOs and aid-funded CSOs and teachers' unions mean the latter may be excluded from formal policy spaces such as local education groups or forums:

Teachers' unions remain perhaps the most powerful, well-organised, and representative of civil-society actors... However, our research suggested that unions remained somewhat marginalised players within sector programmes, primarily because of their focus on employment issues. Government efforts in most countries appear to focus more on containing the disruptive capacity of unions than on engaging with them to improve the quality of teaching. Many unions remain skeptical of core reforms in new sector plans – including decentralisation reforms and plans to hire para-professionals. However, even in countries like Mali, where teachers' unions have opposed major aspects of the sector programme, unions are now committed to working with government towards the expansion of basic education. Our research suggests that the time has come to reconsider the role of teachers' unions in sector programmes – focusing both on their capacities for professional socialisation and mobilisation, and their broader contribution to the fabric of democracy. (Mundy et al., 2010, p. 492).

The scholarship on teachers' unions in developing country contexts, despite their prominence as powerful political actors, is relatively limited (Moe and Wiborg 2016). Some scholars emphasize the power of teacher unions in the politics of education, particularly in the United States, though their impact on educational outcomes is still debated (Cowen and Strunk 2015; Moe 2011; 2009; Hartney and Flavin 2011; Lovenheim 2009). For instance, Hoxby (1996) finds that the effect of teachers' unions is mixed: the increased presence and power of unions may increase school inputs but reduce productivity. Beyond the U.S., Moe and Wiborg (2016) argue that “the fact that its teachers' unions are highly organized, politically very active, and play central roles in the politics of education is likely to be an exceedingly common fact of political life across all nations” (ibid, 85). However, the comparative research on teachers' unions – particularly on their impact on educational reform or outcomes – is limited.

The internal characteristics of teachers' unions shape their role in education politics in developing contexts. Building on the existing research, scholars such as Schneider (2022) have developed analytical frameworks to understand teachers' unions as political actors. He posits that unions, at least in Latin America, vary from being interest groups (in the cases of Chile, Brazil, and Peru) or political machines (in Mexico and Ecuador). Schneider finds that interest group unions are more likely to be open to reform of the education sector – and teachers' careers – than political machine unions, which are more likely to resist reform. However, Novelli and Verger (2012) find that teachers unions are more likely to defend both their members' interests as well as “some notion of ‘public education’” which often puts them in conflict with the state and into alliances with other civil society actors (ibid, 5).

Social movements

Social movements have also played an important role in promoting wider access and equity in education systems, in some cases pushing successfully for the transformation of education provisioning to meet the needs of different social groups. For instance, the Indian National Campaign for Education emerged out of an older movement, the Bachpan Bachao Andolan, which

campaigned against child labor (Grant 2012). The famously effective movement of landless people in Brazil, the MST, spawned (among other achievements) an offshoot movement that ended up transforming the country's rural education system, featuring experiments with:

[I]nformal educational activities in MST occupied encampments and alternative pedagogical practices in schools on agrarian reform settlements. As the MST grew nationally, these local experiments evolved into a proposal for all schools located in MST settlements and camps—which, by 2010, encompassed 2,000 schools with 8,000 teachers and 250,000 students. The MST also pressured the government to fund dozens of adult literacy campaigns, vocational high schools, and bachelor and graduate degree programs for more than 160,000 students in areas of agrarian reform, through partnerships with over eighty educational institutions. During the early 2000s, the MST's educational initiatives expanded to include all rural populations in the Brazilian countryside, not only those in areas of agrarian reform. The proposal became institutionalized within the Brazilian state through national public policies, an office in the Ministry of Education, a presidential decree, and dozens of programs in other federal agencies and subnational governments. By 2010, the MST's educational proposal—now known as *Educação do Campo*—was the Brazilian state's official approach to rural schooling (Tarlau 2019, 3).

Tarlau describes the MST education movement as a form of 'contentious co-governance' that involves "working with, in, through, and outside of the state" (Tarlau 2019, 7). An example similar to the MST is the Zapatista movement in Chiapas, Mexico, which developed its own school models to strengthen systems autonomous from state power (Baronnet 2015), generating grassroots innovations in the process (Maldonado-Villalando et al. 2022).

Conservative and neoliberal actors

Although much of the literature on education civil society focuses on progressive, mainly secular (or at least non-proselytizing), democratic and human rights-oriented groups, other types of non-state actors are also present in national policy spaces, and perhaps increasingly so. Corporate and business actors have become more noticeably engaged in policy advocacy around education reform. Some are active in support of what their critics describe as privatization agendas, but which they frame as improving the quality of education provision through the introduction of market mechanisms, such as school vouchers and other interventions designed to increase 'school choice'.

The arguments made by such actors can be similar to economic growth drivers for education expansion. Specifically the 'varieties of capitalism' (VOC) argument posits that education access expands in response to the skill demands of industry and employers (Busemeyer and Trampusch 2011) and industrial policy on private education in particular (Busemeyer 2014; Hall and Soskice 2001). In one well-documented case, *Mexicanos Primero* was founded by business leaders and academics in 2005 with the aim of 'structural reforms' to improve the education system, in a context in which the teacher unions were historically a key component of the ruling coalition (Cortina and Lafuente 2018a). Their goals include "diminishing the power of the national teachers' union, SNTE, and professionalizing the teaching profession, so that excellent teachers and school leaders are promoted accordingly", as well as improving transparency and efficiency in education

spending, and “increasing school autonomy and participation so that schools not only have more resources but also a say about their pedagogical models and curricula” (Cortina and Lafuente 2018a, 27). Unsurprisingly teacher unions have largely been opposed to the reforms proposed by *Mexicanos Primero*, although some teachers participate in some of their activities (Lafuente and Cortina 2018).

Although the focus in this literature review is not on for-profit providers or non-profit provision but on civil society advocacy and policy influence, it is important to note that **non-state providers have become more prominent actors across the spheres of policy influence**. One expert noted that conceptualization had failed to keep pace with changing policy and practice, and that non-state actors were engaging in education policy in four distinct domains: provision, financing, regulation, and management (Srivastava 2020). Research into the roles of non-state actors across these domains is descriptive, under-theorized, and in general inadequate to support thinking and action on non-state actors, whether those are profit-making, non-profit or ‘hybrid’ actors (Srivastava 2020). In some cases, such as in Uruguay, countries have to date largely avoided the push for privatization that has occurred elsewhere in the region, but a new generation of civil society actors, think tanks and ‘reform entrepreneurs’ is producing ‘privatisation through education policy’ (Moschetti et al. 2020, 386). In a context in which there is no political or policy debate about education privatization, actors backed by corporate interests have engaged in a ‘cultural battle’ in an attempt to destabilize the national consensus in support of public education (Moschetti et al. 2020).

Another set of emerging ‘civil society’ groups that is testing the conventional associations of civil society with progressive agendas in education is groups associated with rightwing and fundamentalist religious groups. In Brazil, for instance, the *Escola sem Partido* (ESP) movement has been campaigning actively against critical pedagogies associated with Paulo Freire, and for greater parental control over children’s education. ESP provided strong support to the one-term presidency of Jair Bolsonaro and are associated with religious right revivalism (Knijnik 2021). The ‘anti-gender’ movement #ConMisHijosNoTeMetas in Peru is similarly adopting social movement tactics, and has links to rightwing groups internationally (Rousseau 2020). While there is nothing new about (conservative) faith-based education providers and advocacy, the adoption of social movement tactics and justifications is a departure from the customary strategies of conservative groups, and a commentary on the relative effectiveness of civil society organizing in education.

3. Political contexts

Education and democratization

The academic literature has debated the relationship between education and democracy. Scholars of modernization theory such as Lipset (1959; 1968) argued that the preferences of educated people are one driver of democracy, and as close as possible to a necessary condition for democracy to be established (Lipset 1959, 80). In this theory, an educated population leads to democracy because increasing socio-economic development strengthens values such as tolerance,

civic participation and voting (Lipset 1959); educated youth are therefore a threat to autocratic regimes. Though much of modernization theory has since been refuted (Boix and Stokes 2002; Przeworski et al. 2003; Geddes 2011), this early insight on educated youth has been revisited by democratization scholars, and the relationship between education and democracy is considered one of the few modernization variables that has withstood subsequent theory testing (Diamond 2006).

From the education literature, democratic strengthening is one of the constants of recent decades. The Delors report, for example, proposes the need to "revivify" democracy as the primary social bond of collective coexistence. It also points out the importance of civic education and citizenship practices as education goals (Delors 1998). In this same sense, the UNESCO report *A Reimagining Our Futures Together: a New Social Contract for Education* (UNESCO 2022) warns of the risks of democratic regression and growing polarization, proposing a new contract reinforcing the idea that education is a public project and a common good.

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Democracies are more likely than nondemocracies to invest in education for their citizens, particularly primary education (Stasavage 2005a; Brown and Hunter 1999). As democracy shifts the political power base away from elites and more towards the mass population, mass preferences for public policy becomes more 'pro-poor' and redistributive in democracies, including preferences for higher spending on education that benefits a wider section of the population: "the impact of democracy is felt not only in *how much* education is made available but the particular *types* of education that emerge" (Ansell 2010, 22; original emphasis). But while there is an established literature on civic education (or citizenship education to support democratic norms, values and knowledge of rights) in democratizing states (Bratton et al. 1999; Finkel, Sabatini, and Bevis 2000; Carothers 1997), we know less about whether or how civil society helps drive this expansionary process at the national level.

Empirical evidence supports the view that democratization in developing states has spurred both an expansion of civic space and investment in universal education: the period after the Cold War saw a wave of democratization, new space for civil society, and an expansion of primary education in the global South. Theorizing about the relationship between education and democracy in developing countries is relatively limited, but scholars have shown empirically that multi-party electoral democracies in developing countries have led to expanded access and higher education spending, based on a logic of redistribution as outlined above (Mundy 2008; Stasavage 2005a; Brown and Hunter 1999). Ansell (2008) argues that variation in public education spending can be explained in part by the extent of democracy: where citizens are better able to express their

preferences, they are “more likely to tilt spending toward universally provided primary education and away from elite-targeted tertiary education and private education” (314). Nepal is an example where the expansion of popular franchise and of civil society organization were accompanied by educational expansion, with the two most prominent expansions of Nepal’s education system – after 1951 and after 1990 – mirroring the expansion of civic space (Bhatta 2011). This included national and global commitments as “after 1990, when the People’s Movement ushered in a democratic era and when Nepal also committed to the World Declaration on Education for All” (Bhatta 2011, 12). Periods of democratization have also been linked to the abolition of school fees (and the expected expansion of enrolment) in Uganda (Stasavage 2005b).

Information-sharing may be one strategy through which civil society promotes political preferences for education spending in democracies. Multi-party electoral democracy and the expansion of mass education are causally linked through the mechanism of information-sharing, as the media and civic group generate public information about education policy:

When voters have better information about the performance of individual government officials with regard to education policies, then an incumbent government will logically face a greater incentive to deliver outcomes desired by constituents (Stasavage 2005b, 66).

However, information on its own is rarely sufficient to generate civic oversight and engagement in education, which requires deeper and more enduring forms of citizen participation (Fox 2015).

States transitioning to democracy are more likely to bargain with civil society organizations – particularly teacher unions – regarding education. Certain civic actors – specifically teacher unions – may have more weight in democracies. Murillo (1999) and Synott (2002) find that teacher unions have greater opportunities to bargain with government officials in democratic compared to authoritarian regimes; this builds on the literature that argues the presence and strength of teachers’ unions may increase education spending and access (Hoxby 1996). Teacher unions battled with the democratic government of South Korea over human rights and educational reform in the 1990s (Synott 2002). Similarly in Argentina and Mexico, when the governments sought to decentralize and liberalize education in the early 1990s, they faced opposition from teacher unions and their members (Murillo 1999). Democratization may also enable civil society organizations previously limited to service delivery to engage in policy advocacy, as was the case in the Philippines, where the ‘People Power’ revolution that ousted the authoritarian regime in 1986 nurtured a “belief that citizens have the right to participate” (Hoop 2012, 33).

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Non-democracies and hybrid regimes with restricted civic space

There has been less focus on the role of education-focused civil society actors in non-democracies or regimes in transition. There is limited attention to or consensus about the role of civil society within nondemocracies, including why some – but not other – nondemocracies expand mass education access. The claims from modernization theory that educated citizens’ preferences for democracy post a threat to autocratic regimes (Lipset 1968; Diamond 2006; Sanborn and Thyne 2014; Dahlum 2019) have been questioned by analysis of the complicated relationship between education and democratization. Bush and Saltarelli (2000) discuss the two faces of education: promoted as a panacea intended to solve many societal ills, but at times leveraged to exacerbate hostility and ethnic tension between groups. Acemoglu et al. (2005) find that more educated states were not more likely to become democratic in the late 20th century, and argue that theorizing on the historical effect of education on democratization may be spurious. Education may not be the cause of democracy but its effect (Baum and Lake 2003; Lake and Baum 2001): “the causal arrow appears to run from democracy to public health and education rather than the reverse” (Baum and Lake 2003, 335).

Hickey *et al* (2015) and Kosack (2012) argue that political organization, rather than regime type, may be more influential in nondemocratic regimes. Drawing on the historical cases of Brazil, Ghana, and Taiwan, Kosack argues that states invest in mass education when political entrepreneurs harness the political organization of the poor, as one of their vital constituencies (2012). Hickey and Hossain also conclude that it is the political settlement (or distribution of power), regardless of regime type, and the ways in which education affects the distribution of power, which shapes the nature and degree of support for education reform (Hickey and Hossain 2019).

In countries where civic space is restricted, transnational civil society organizations may have a role in supporting local education advocacy. A tactic that CSOs in restricted civic spaces attempt is the ‘boomerang pattern’ (Keck and Sikkink 1999), in which CSOs gain leverage from transnational supporters in contexts where they are unable to engage with their state. For instance, the international NGO ActionAid adopted the boomerang approach for its global Elimu campaign to support education-based civil society:

National civil society rarely had a meaningful say, and the parents of poor children, who most needed the reform, had no voice whatsoever. ActionAid came to see this democratic deficit in education as the fundamental root of all the other problems of access, quality, and equity. The Elimu campaign thus became a ‘process campaign’, where the central focus was to address this crisis in democracy through building strong national campaigns in each country. The precise agenda for educational reform that these coalitions would take up could not be predetermined. These national coalitions or campaigns grew rapidly, linking different local, national, and international NGOs and reaching out to social movements, parent groups, teacher unions, academics, and human rights organisations. The aim was to

build such strong national platforms that no government could ignore them (Archer 2010, 615).

Neoliberal policy agendas

Neoliberal ideologies encouraged the privatization of education. Robertson *et al* argue that neoliberal globalization has “shaped the global resurgence of interest in public private partnerships in education” (2010: 5). Neoliberal ideologies have framed education less as a public than as a private good (Giroux 2010), and treated schooling provision as a deregulated marketplace with parental freedom of choice (Raduntz 2005). Milton Friedman (1955) himself argued against the state’s so-called ‘monopoly’ on education provision and advocated for privately-run publicly funded (i.e., charter) schools. However, the emergence of private actors in education provision has been strongly contested by many civil society groups in the global South (Robertson et al. 2012). Some expect democratization will increase support for public education and away from private education spending (Ansell 2008). The Global Campaign for Education (GCE) and its member coalitions have consistently argued against privatization, including in the promotion of the Education for All aid agenda (Gaventa and Mayo 2009).

Neoliberal pushes to ‘downsize’ the state coincided with increased education-focused civil society activity in some contexts. Kamat (2004) and Edwards and Hulme (1997) argued that the neoliberal policy agenda had two principal strategies: “marketization /privatization of economic and social sectors (such as health and education) and democratization of civil society” (Kamat 2004, 170). As a result, civil society actors were increasingly prominent in the service delivery and, later on, advocacy for education as well. Beginning in the 1980s, NGOs were replacing some state functions in education (as well as health), as a direct result of international neoliberal policy agendas (Lewis 2002; Rose 2009). The power of civil society in education increased, as CSOs “displayed a range of economic, social, and political powers, have determined and implemented education policy, and even substantively impacted educational content” (Gali and Schechter 2021, 271). However, civil society actors have also been actively contesting neoliberal policy changes. For instance in Latin America, teacher unions contested attempts to decentralize education in Argentina and Mexico (Murillo 1999) and student protests in Chile directly targeted the emergence of private actors profiting from education (Somma 2012).

Emergencies

Civil society has been prominent in efforts to address the acute harms to children and their education from conflict and displacement. Access to schooling tends to be particularly difficult in emergency contexts, and public spending on education is low in conditions of armed conflict. In such conditions, humanitarian and development NGOs and actors – such as the UN’s Education Cannot Wait for education in emergencies – have become prominent providers of education, with experiments in different forms of provision (Rose and Greeley 2006; UNESCO 2011). The literature notes contradictions between the security imperatives of state-building on the one hand, implying state provision of education and other public services as a source of legitimacy, state-capacity building, and for fostering national cohesion; and ‘the humanitarian agenda [which] demands fast action on education service delivery’ (Rose and Greeley 2006, 2; see also Batley and McLoughlin 2010). While the reconstruction of the social conflict points to the need for public education, post-conflict states may lack the capacity for provision, regulation or even the more indirect role of ‘stewardship’ implied by plural models of education provision (Batley and

McLoughlin 2010). In the wake of the COVID19 pandemic, we would expect that more literature on the role of civil society in national education policymaking and implementation during other kinds of emergencies will also emerge. This would appear to be an issue on which more learning is needed.

4. Aid agendas

The Education for All and Millennium Development Goal frameworks

The aid agenda in support of basic education enabled education civil society activism and advocacy to flourish. Modern civil society organizations began to play a significant role in relation to education policy and implementation in the global South in the 1990s, but this role expanded, deepened, and changed in the 2000s, with “clear signs of a new and qualitatively different wave of transnational nongovernmental advocacy initiatives in education, especially around the idea of ‘education for all’” (Mundy and Murphy 2001, 86). This new space was carved out by a pair of global commitments that together framed the aid agenda in basic education, both in 2000: the Education For All (EFA) Dakar Framework for Action, and the second Millennium Development Goal (MDG), ‘Achieving Universal Primary Education’ (Mundy and Murphy 2001; Magrath 2015; Beardmore 2012; Croso 2012; Ahmed 2010; Tikly 2017). These commitments emerged at a time when progress on education had stalled, human development had become a central aim of the development process, and the end of the Cold War had brought optimism, including about a role for civil society (Benavot et al. 2016, 241). These spaces have expanded in the 2030 agenda, in particular with the discussion of the SDGs and the Incheon framework for action (UNESCO 2016).

The EFA Declaration was first made at the World Education Forum Conference in Jomtien in 1990, which brought together government, multilateral and non-governmental organizations in an unprecedented agreement about the priority of basic education for all (Buchert 1995). However progress was initially slow, partly because many countries were undergoing structural adjustment programs and could not afford to increase financing (Beardmore 2012). Efforts to strengthen accountability for delivering on the Jomtien commitments came in two forms, both featuring new roles for civil society (Benavot et al., 2016). The first was an ambitious program of assessments of progress after a decade of EFA commitment, around which civil society groups and researchers monitored. The second was a concerted civil society campaign to increase pressure on the international community to act (see also Tota 2014):

At the forefront of this movement was the Global Campaign for Education (GCE), whose founding members included Action Aid, Oxfam International, the Global March Against Child Labour, and Education International. GCE was established in October 1999 to “mobilise public pressure on governments to fulfil their promises to provide free, quality education for all people, particularly for women.” (Benavot et al., 2016, p. 242).

The formation of the GCE was a key step towards enabling civil society to campaign in a coordinated way. GCE was founded by international NGOs and the Global March Against Child Labour in the run-up to the Dakar Conference ‘to provide a platform to unify and coordinate civil

society voices about the global education agenda’ (from the GCE website; <https://campaignforeducation.org/en/who-we-are/our-story>). NGOs became prominent in the EFA movement helping to forge ‘[a] new consensus around global education norms’ in a global governance arena that was ‘readily inclusive of non-state actors as key advocates for EFA’ (Menashy 2016, 100):

The Dakar Framework for Action embodied clear strategies to ensure the right to education by 2015, and in doing so defined the global architecture for education development over the coming decade ... Although challenging to measure in their breadth and complexity, the EFA goals reflected a strong rights-based approach and important strategies to achieve them – both a consequence of strong civil society leadership in drafting the vision.” (Beardmore 2012, 895).

Then-UN Secretary General Kofi Annan acknowledged the GCE, and noted that ‘we cannot win the battle (...) without your expertise, your energy, and your capacity for action’ (cited in Gaventa and Mayo 2009, 20).

The goal of “achieving universal primary education” was adopted as part of the broader Millennium Declaration. MDG2 inserted targets that were similar in parts to the EFA declaration into a broader aid agenda that also set targets for human development goals, encouraging aid donors and governments to focus on and monitor progress towards key measurable targets. The MDG process took a more centralized approach to planning than the Dakar Framework, which had aimed for stronger country-ownership of the planning process (Unterhalter 2014). The MDG target for education was narrower than the EFA goals, and focused on raising enrollment rates in primary education rather than on a broader transformation of the education system. While the MDG agenda helped spur the enrolment of millions of children over the period, it focused on aggregate goals that obscured problems of inequality, and reduced the right to education to access to primary school (Beardmore 2012; Benavot et al. 2016; Unterhalter 2014).

Despite these tensions and contradictions between the two processes, the aid agenda framed by the EFA and the MDGs created new space for coordinated civil society action. This included monitoring at multiple levels of the system. It also enabled civil society to contribute directly to forging a global consensus around the norm that everyone should be able to access at least primary schooling (see, for instance, Unterhalter 2012a). The 12 strategies for achieving EFA included roles for civic actors at international and national levels in mobilizing political commitment; participation in developing, implementing and monitoring strategies; developing ‘responsive, participatory and accountable systems of educational governance and management; and monitoring progress (Benavot et al. 2016).

The rising importance of international NGOs in education policy spaces raises questions about whether they have occupied space more appropriately occupied by grassroots or domestic organizations (Strutt and Kepe 2010). However, as noted above, international civil society activism in the EFA and MDGs period has been marked by a ‘boomerang effect’ (see above), when groups with global positioning and networks amplify the voice of their Southern allies, create pressure at international levels including on aid donors and UN agencies, and provide protection when needed. In relation to global education governance, the effect shaped advocacy

and activism of Education International in their struggles against privatization and neoliberal reforms (Brehm and Silova 2019); in relation to the adoption of rights-based language and policies in South Asia (Bajaj and Kidwai 2016); and in the use of evidence-based advocacy in the Education Watch initiatives led by the Asia South Pacific Association for Basic and Adult Education (ASPBAE)(Magrath 2015; see also Fulge, Bieber, and Martens 2016 for a more theoretical perspective.)

An important conceptual contribution of the literature on the emergence of what has become a ‘global education policy field’ (Verger, Altinyelken, and Novelli 2018) is to recognize that these aid-supported interventions in education policymaking are important sites of power that shape what is possible in global and to some extent, national education policy (Moutsios 2010; Menashy 2018). This includes enabling a concentration of resources and authority in selected agencies and institutions, including civil society groups, in which some actors were empowered while others were sidelined (Tikly 2017). The regime of global governance “conveys authority, guidance, and compliance concerning collective activities” (Rambla et al. 2017, 853). The global governance regime of education policy challenged conceptual ‘statism’, by drawing attention to how globalization, development finance, and international rule-making undermine assumptions that nation-states are the most important or natural sites of education policy decision-making (Verger, Altinyelken, and Novelli 2018).

However, while EFA and the MDGs created unprecedented global coordination around basic education, coordination was not matched by enforcement mechanisms that bound aid agencies or governments to their commitments, or sanctioned them for their failures to deliver:

When 70 countries failed to meet the MDG of achieving gender parity in primary and secondary education by 2005, very little happened. The leaders who agreed to this MDG were not held to account. Indeed, the UN General Assembly (UNGA) in 2005 passed without any significant reference to the failure to meet this target. At the UNGA in 2015, all the focus was on setting the new sustainable development goals for achievement in 2030, rather than analyzing why previous goals had not been met. This is perhaps inherent to the loose political agreements set at big UN conferences (Archer 2021, 132).

Civil society has not succeeded in generating or sustaining the political commitment necessary in global policy spaces; national-level commitment has also been inconsistent and/or uneven. One explanation for this remains the relative weakness of and donor dependence among civil society in countries with the strongest need to generate political commitment:

The rural poor who have the most to gain from UPE implementation have been the least likely to organise themselves into effective education pressure groups at both regional and national levels. Education NGOs only can take on some of the roles of mass political organisations but, with a few exceptions, they too have remained relatively weak across most of SSA. It is also the case that education NGOs have increasingly focused their attention on learning outcomes rather than increasing access. In part, this is because they are heavily reliant on donor funding and are obliged, therefore, to focus on the mounting concerns of their funders about learning outcomes (Bennell 2021, 8).

The limited ability of civil society to generate sustained political commitment to the goals is particularly visible with respect to financing. Space for civil society in the EFA and MDG regimes aimed to, among other things, generate the political commitment necessary to finance and reform education systems to deliver on the agendas, including for ‘holding aid donors and governments to account for their pledges at Dakar’ (UNESCO 2010, 289). However, observers note the chronic shortfall in financing for basic education in the global South, as well as its uneven distribution (Benavot et al. 2016). The Fast Track Initiative was set up in 2002 with the aim of ensuring that countries whose governments were committed to education for all could access the financing necessary to do so. The emergence of the Fast Track Initiative, subsequently the Global Partnership for Education, further consolidated and institutionalized new roles for non-state actors in education financing and policy processes:

These newer forms of education governance often operate across scales, through interactions between local, regional and national governments and intergovernmental organizations, and between these and national and transnationally configured profit firms, philanthropists, NGOs and religious organizations.” (Robertson et al. 2012, 1)

Public-Private Partnerships (PPPs) or multi-stakeholder initiatives of this kind create space for the private for-profit sector in addition to civil society organizations. However, it should be noted that the private sector has been less active in the Global Partnership for Education than in other sectoral public-private partnerships, perhaps reflecting the relatively stronger emphasis on public education than on public provision in other sectors (Schäferhoff, Campe, and Kaan 2009).

Aid effectiveness

The sector-wide and sectoral approaches introduced in the 2000s as part of the aid effectiveness agenda also granted more space and legitimacy to civil society. Sectoral approaches enabled ‘partnership’ and ‘participation’ in policy dialogue, but research in countries such as Burkina Faso, Mali, Kenya and Tanzania found that in practice this meant more of a role for civil society in service provision and local-level accountability work than national policy advocacy or monitoring (Mundy et al. 2010). Mundy et al. also conclude that a critical factor shaping civil society effectiveness is whether they occupy ‘invited’ policy spaces or create their own.

The relationship between governments and NGOs in South Asia was closely shaped by the aid effectiveness agenda (Batley and Rose 2010):

The NGOs anticipate a shift towards donor funding being channelled via governments rather than directly provided to NGOs, as donors seek to fulfil the Paris Declaration pledges of coordination and country ownership. NGOs expect such arrangements to be accompanied by more hierarchical written agreements or contracts, placing governments more firmly in the driving seat. This has intensified NGO awareness and interest in trying to work more closely with government officials to build cooperative relationships.” (Batley and Rose, 2010, p. 4)

In a study of Nepal, Rappleye concluded that the SWAp donor modality made it possible for NGOs to ‘move up’ the policy chain, from a primary focus on service provision, to engaging in dialogue

in national policy spaces. Donors played a ‘match-making’ role between governments and civil society organizations (see also Bhatta 2011).

Participation in education service provision has shaped the scope for civil society advocacy on national education policy. Faith-based civil society organizations have provided schools and influenced education policy and provision through the history of formal education systems (see above), but secular and progressive NGOs have been more recent entrants as actors in global and national education policy spaces. Civil society groups acted as ‘watchdogs’ monitoring education-related human rights in the latter 20th century (Ahmed 2010). By the 1980s, NGOs were being drawn into providing services in contexts where structural adjustment programs had hollowed out public education, becoming the unwitting agents of processes of privatization to which they were opposed (Archer 1994). NGOs developed innovative schooling systems, but filling the gaps left by weak public provision ran the risk of compromising or undermining their roles in advocating for education public spending or reforms (Archer 1994). ActionAid learned from these experiences, and their strategies evolved in ways that mirror trends in education civil society more broadly (Archer 2010):

“From its early work responding to the immediate needs of sponsored children, it has evolved into a rights-based organisation that links grassroots programmes to national and international campaigning and advocacy work. The driving force in this evolution of ActionAid’s education work has been its continuing commitment to the critical analysis of practical experience ... The story of ActionAid is illustrative in many ways of wider changes in the NGO sector since the early 1970s.” (Archer, 2010, p. 2)

NGOs and private provision

As noted above, non-state provision was also encouraged by neoliberal ideologies after the end of the Cold War. In this setting, NGOs had the space and resources, including from governments, to experiment with different forms of provision designed to include marginalized groups. In South Asia, Batley and Rose noted that governments were including NGO programs as complementary rather than alternative to government schools in their education plans, in a move that was reflecting trends internationally (2010). While critiques of the neoliberalization of education through civil society service provision were found to be valid in extreme cases, rather than supplanting or undermining public provision, NGO engagement in education services could harness the benefits of broader outreach and strengthen public responsibility:

Governments can maintain responsibility while benefiting from well-structured support by NGOs, in particular to provide education in difficult circumstances. Through this, NGOs can exert influence on both policy and service delivery where they take time to establish a reputation, show clear expertise, invest in building informal relationships with government, and ensure that they are not dependent on any one source of funding (Batley and Rose 2010, 584–85).

Education civil society has also, however, supported efforts to privatize education. A new generation of civil society actors, think tanks and ‘reform entrepreneurs’ in Uruguay, a country known to be an outlier in the region for its resistance to privatization, are promoting:

an incipient form of ... ‘privatisation through education policy’ ... the different ways in which corporations, NGOs and philanthropic organizations increasingly engage in the process of policy formation through advice, consultation, research, evaluations and various forms of influence (Moschetti *et al* 2020, 368).

Moschetti *et al* argue that Uruguay’s historical resistance against privatization of education has meant that the private sector was left with no option other than to try to influence policy through research and advocacy, aiming to change ideas in the policy space in a context in which the state and other national actors have not engaged in promoting meanings of different models of education. Representatives of the private education sector have not developed a role as actors in policy spaces to date: the ‘cultural battle’ to promote privatization in education has been led by civil society organizations, think-tanks and foundations, many of which represent private sector interests and active proponents of privatization (2020).

5. Thematic areas for civil society activism and advocacy

This section provides an indicative discussion of selected themes in civil society activism and advocacy in education, focusing on high-level lessons to date.

Inclusion and equity: establishing a norm of education [for all](#)

The single most significant thematic focus for civil society advocacy in education has been establishing the norm that everyone is entitled to at least basic education. Contributing to the framing of a global consensus around universal basic education has been the signature achievement of the education civil society community. The framing has provided the focus and legitimation for a broad range of campaigns of advocacy and pioneering programs. Most important for the present review is that the consensus has encouraged governments to conform to and comply with the international norm, at least in principle;¹ the acceptance of this principle has created space for civil society to advocate for the inclusion of specific groups currently or potentially excluded from education. It has provided the justification for a range of programs and policies designed to overcome socio-cultural, economic, and other barriers to education. An exhaustive account of the ways in which civil society has contributed to establishing this norm is not possible, nor would it necessarily be analytically productive. In this section we provide illustrative examples of the ways in which the emphasis by progressive, secular civil society on the universal nature of education rights has provided a focus and legitimation for activism and advocacy around rights to access education.

Part of the significance of this normative consensus is that it is arguably not found to the same degree in other sectors, particularly in the implication that governments are ultimately accountable for ensuring education provision. It is important to be clear where this consensus lies. The Education For All movement and the MDG targets had different visions of ‘education’, as noted

¹ It is not clear to what extent national governments or polities ‘own’ these norms of universality: as Tikly notes in his study of EFA as a global governance regime, many low-income country governments are heavily dependent on the aid system for educational spending, making the acceptance of these norms all but compulsory (Tikly 2017). The extent to which these norms are internalized and institutionalized in policy and practice is also uneven, as Unterhalter and North show in analysis of initiatives to improve gender equality in education systems (Unterhalter and North 2011b).

above (Beardmore 2012; Benavot et al. 2016; Unterhalter 2014). Yet the policy regime enabled an unprecedented degree of coherence and agreement around the *universal* nature of the global education goals, which came to be embedded in a new consensus on global development (Mundy 2006). Movements and initiatives to expand access to girls, children living with poverty and disabilities as well as street, rural and working children were particularly prominent in the 1990s and the 2000s. Getting all children educated remains a significant feature of civil society programming and campaigns to date, including more recently with campaign groups such as [Girls Not Brides](#), which sees girls' education as one of the best ways of preventing child marriage, and the UN fund for education in conflict and emergencies, Education Cannot Wait.

It is beyond the scope of the present review to discuss all literature on civil society activism in relation to inclusion and equity in education, so we focus on selected issues with the aim of identifying areas for further inquiry. First, **civil society organizations and social movements have been at the forefront of efforts to recognize and realize the right to education** (Mundy 2012). The rights-based approach treats education as “a fundamental human right and not just a basic need or social service” (Ron-Balsera and Marphatia 2012, 217); by its nature it implies universality and state responsibility to act. The right to education is enshrined in international human rights conventions and treaties, including the Universal Declaration of Human Rights and the Convention on the Rights of the Child; countries have adopted right to education laws after concerted campaigns by broad-based social movements (Sripati and Thiruvengadam 2004; Grant 2012). Around 80% of all national constitutions specify education as a right within their national laws (Rosser and Joshi 2018). The right to education has been more recently codified and specified through a participatory process that crafted the Abidjan Principles on the Right to Education.² These principles establish the obligations of states to provide public education and to regulate private provision.

However, while “[e]ducation is one of the most universally recognized human rights ... it remains widely violated, poorly understood and under-utilized by education advocates” (Archer 2021, 130). The EFA goals, reformulated as the more reductive MDG2 (universal primary education), are more often the touchstone for advocates of universal education, despite the fact that they lack the in-built enforcement mechanisms of rights under international or national law (Archer 2021). Rights-based approaches have been gaining in prominence in civil society education strategies because they offer a stronger chance of sustainability than activities framed around needs, after efforts to promote the inclusion of marginalized children through alternative and supplementary schools resulted in unsustainable and undesirable outcomes:

Unintentionally, ActionAid was absolving governments of responsibility and becoming an agent of the privatization of education for poor children ... the appropriate role for an NGO was to enable communities to demand their right to quality education and to enable governments as duty bearer to effectively deliver those services (Archer 2021, 134-5).

Rights-based approaches to education advocacy have depended substantially on legal activism, notably in Brazil, Colombia, India, Indonesia, and South Africa (Rosser and Joshi 2018). Legal activism around rights to public services tends in general to favor more affluent individuals and can even lead to increased inequality. However, legal activism in India and Indonesia ended up

² For more detail, see <https://www.abidjanprinciples.org/> [accessed 25 May 2023].

strengthening the rights of marginalized and low-income communities to access education, because people and civic groups enjoyed the support of members of the judiciary; NGOs with funding and legal knowhow; and because broader political mobilization was supportive of their goals (Rosser and Joshi 2018).

Second, **civil society and social movements have also helped establish norms of gender parity in education policy.** Historical gender disparities in access to basic education have narrowed markedly in many countries in the global South in the past generation (World Bank 2012; Benavot et al. 2016). While social movements previously focused more on popular and adult education than formal education system reforms (Stromquist 2001), the 21st century saw a rapid and large-scale uptick in the involvement of civil society organizations and NGOs, often aid-funded, in campaigning for gender-equal access to formal schooling. Often in coalition or partnership with multilateral agencies and governments, civil society organizations adopted a range of approaches to address gender inequality in education, including: advocacy campaigns designed to shift societal norms and public policies that favored boys' over girls' education; pilot programs, including in non-formal education, intended to enable girls from low-income or marginalized families to attend school; curricular and pedagogical reforms to support and sustain girls' participation; advocacy for incentives and scholarships intended to reduce the costs of girls' school attendance and monitoring the gender gap in primary school enrolments. (Smyth and Rao 2004; Unterhalter 2012b; Unterhalter and North 2017; Chabbott 2015; Sperling and Winthrop 2015). Multi-pronged and wide-ranging campaigns were adopted by civil society organizations in developing countries, often with financial and other support from international actors. Partnerships and innovations were shared across organizations and countries, and there was a large amount of learning about 'what works' to get girls into school (Sperling and Winthrop 2015).

The norm that girls should receive education as much as boys is now more widely accepted than before the decades of the EFA, MDGs and civil society activism, and this alone is a major achievement of the coalitions forged during the EFA decades. However, from the outset women's rights activists and scholars were critical of the reduction of the MDG gender equality goals to the school enrolment of girls: gender parity, even where it was achieved, never equaled gender equality (Unterhalter 2012b; Unterhalter and North 2011a; Unterhalter 2014; North 2010; Benavot et al. 2016). Girls enrolled in school in far greater numbers, enabled by new schools near their homes, recruitment of women teachers, and non-formal programs designed to enable girls from marginalized communities to transition to formal education (Hossain and Kabeer 2004; Chabbott 2015; Chowdhury, Nath, and Choudhury 2003). But without the social or institutional support to transform education systems to enable girls to thrive, to transition into further and higher education, or to ensure their education led to productive adult lives, many girls (and indeed boys from low-income or marginalized households) dropped out early, learned little, or were unable to transition beyond basic schooling. A substantial body of work on the gender and education goals offers a number of lessons about how the reductive framing of the MDGs counteracted the positive effects of a focus for coordinated civil society action in partnership with other actors (Zeitlin et al. 2011; Unterhalter 2014; 2012b; Unterhalter and North 2011a). Even in institutional settings that were ostensibly pro-feminist, the implementation of gender equality goals was shaped by the framing of the goals themselves, which ran the risk of inadvertently worsening gender inequality: without transforming education systems, the insertion of girls into schools merely relocated gender

inequality within classrooms. In any case, policies were rarely accompanied by sufficient resources to make implementation feasible (Unterhalter and North 2017).

While the establishment of a basic norm and reductive targets by no means resolved issues of inequality in or beyond education systems, they **provided a rallying point and source of legitimation for civil society efforts to include children who would otherwise have lacked access to schooling**. Children from marginalized backgrounds, who face stigma and other barriers to school due to their background, identity or personal characteristics, comprise a large proportion of children who are in effect excluded from school, as well as those who do not complete basic levels (UNESCO 2020). Striking advances have been made with respect to reforming school systems to include children with disabilities, in which civil society activism has played a role. In many respects, the experiences with civil society activism around inclusive education (for children with disabilities and special education needs) offers a lens onto civil society activism in education in the global South more generally. Civil society groups vary by their origins; whether or not they are membership organizations; and whether they provide services or advocate for public services on behalf of their constituencies (or beneficiaries). For instance, the 2020 Global Education Monitoring Report documented the efforts of four types of civic groups active in the education rights of children with disabilities: organizations *for* people with disabilities, often with a religious or philanthropic background; organizations *by* people with disabilities, or disability rights groups which campaign for inclusion as their right; associations of parents of children with disabilities; and international NGOs (UNESCO 2020; Singal 2020). Civil society groups such as the South African Disabled Children’s Action Group have actively supported low-income families with access to services, including school, through face-to-face mutual aid and support (Singal 2020). At the other end of the scale, international NGOs have also played an important role in advocating for more inclusive education policies; however, as they are accountable to funders, they are sometimes accused of failing to take account of local demands and concerns. And CSOs have also played an important part in setting norms about children and disabilities, playing a “particularly powerful role ... in raising awareness around disability issues, especially within local communities” (Singal 2020, 21). Nevertheless, civil society activism around inclusive education “has challenges, for instance in the extent to which they complement or substitute for government services and the extent to which they support special or inclusive education” (UNESCO 2020, 191).

Social accountability and governance

Civil society has focused on improving governance and accountability in national education policy through two main entry points: ‘social accountability’ approaches to promote participatory monitoring of education inputs and school performance from below, and ‘open government’ approaches which aim to improve transparency and the scope for citizen oversight and participation through opening up from above, both used to strengthen accountability and responsiveness in education systems (Hevia 2021; Huss and Keudel 2020).

‘Social accountability’ approaches are marked by their use of tools such as community scorecards and other tools for assessing the performance of local services, with the ultimate aim of engaging service-providers (teachers, schools and administrators) in resolving problems and improving practice. Early optimism about the use of social accountability ‘tools’ to address accountability deficits in education (see, for instance, (World Bank 2003)) has given way to recognition that

efforts to empower citizens to monitor and improve education service delivery require close attention to context and power relations. Notably, much analysis of social accountability initiatives concludes that **strengthening people’s capacities to monitor services fails unless they elicit correspondingly stronger capacities by state actors to respond**, including adequate financing and resourcing for schools and education administrations. Learning from these initiatives has led to a distinction between ‘social accountability in education’ and ‘educational accountability’: the term ‘accountability’ has emerged within a relatively conservative vision that seeks to hold teachers and schools responsible for poor results, rather than to hold governments accountable for ensuring the resources and capacities necessary to provide quality education (Hevia and Vergara-Lope 2019).

Several meta-analyses of social accountability approaches to education governance have arrived at similar conclusions. People may be able to use tools (such as the international NGO CARE’s community scorecard) to monitor and identify the problems with their local services, yet lack the technical capacities to assess outcomes and specify solutions (Gullo *et al* 2016). Such processes may end up deepening the exclusion of groups that lack the capacity or resources to monitor or demand service improvements (Gullo *et al* 2016). A study of CARE’s community scorecard approach found support for an ‘accountability sandwich’ strategy (citing Fox (2007)), that is, a social accountability measure that would make it possible to both strengthen citizen capacities to demand improved services as well as government capacities to respond (Wild, Wales, and Chambers 2015). This kind of ‘sandwiching’ effect works when a reform enjoys early and consistent engagement by decision-makers, as researchers found in projects in Ethiopia and Malawi (Wild, Wales, and Chambers 2015). Wild *et al* conclude that CARE’s community scorecard programs demonstrate the need for flexible responsiveness to context (2015).

In their systematic review of the literature on interventions designed to empower communities and improve accountability and learning outcomes in school, Westthorp *et al* identified four types of initiative: (1) specific social accountability tools, such as scorecards, monitoring textbooks, and tracking teacher attendance; (2) de-centralization; (3) school-based management; and (4) community schools (Westthorp *et al*. 2014). Examples of the first include monitoring the policy for distributing textbooks in the Philippines in the Textbook Count campaign (Fox, Akeron, and Guillán 2016); this deployed a strategy known as ‘vertical integration’, because it involves multi-level monitoring in order to trigger responses at higher levels of the system, rather than merely monitoring at a single level or point in the system at which state actors may lack the capacity or authority to respond (Akeron 2022; Akeron and Isaac 2016). Other initiatives include service report cards (Cheng and Moses 2016), and participatory mechanisms to improve learning, often with co-produced community interventions (Banerjee *et al*. 2010). One issue with initiatives focused on local-level monitoring is that they treat parents as “client-citizens” who use information to hold the providers of the educational service—schools and teachers—accountable in a “short-route” to accountability (Gershberg, González, and Meade 2012). However, the type of relationship that this model proposes assumes a lack of trust between parents / communities and teachers/schools, particularly around teacher performance and school leadership, which may be neither true nor helpful for bringing about change (Hevia and Vergara-Lope 2019).

Evidence supports the view that **social accountability measures only work when contextualized to local education conditions and concerns**. Community scorecards were found to be most

effective in Uganda when communities determined what needed to be monitored, rather than having standards and monitoring frameworks imposed on them (Zeitlin et al. 2011). Not all kinds of information provision yield stronger community engagement with service providers: much depends on the context into which new information is being introduced. A study of three Indian states found a structured awareness campaign about community participation in school governance improved community participation and (to some degree) teacher performance and attendance, but yielded no real gains in learning outcomes, reflecting the limited scope of the intervention and its short time-frame (Pandey, Goyal, and Sundararaman 2009). Another study in Uganda found that bringing citizens together to deliberate, assess, and communicate their findings to officials helped overcome ‘accountability traps’, by building their capabilities to engage and uniting communities around common concerns, standards, and enforcement mechanisms. The initiatives brought them into more regular conversation and improved the transparency and responsiveness of education service providers, who became accustomed to expecting scrutiny and questioning (Walker 2018).

Recent analysis of World Bank Global Partnership for Social Accountability (GPSA)-funded initiatives focused on ‘collaborative’ forms of social accountability, defined as

when citizens, civil society groups, and public sector institutions engage in joint, iterative problem solving to improve service delivery, sector governance, and accountability. This is opposed to confrontational, advocacy-based social accountability strategies that are based on the development of civil society’s countervailing power (Guerzovich, Poli, and Fokkelman 2020, 3).

Guerzovich *et al* found that second-generation approaches had built on the learning from the first, and that success in social accountability depends on being embedded in broader social and political processes. Discrete interventions involving the provision of information alone tend to fail, and analysis of “what works” requires deep understanding of the political and institutional context (Guerzovich, Poli, and Fokkelman 2020, 5). Applying lessons from social accountability efforts to address the learning crisis in education, the authors conclude that social accountability programming can usefully map onto the diagnosis of the World Development Report *Learning to Realize Education’s Promise* (World Bank 2018) by working to collaboratively a) assess learning, to make it a shared goal; b) act on the evidence generated; and c) align actors behind the shared goals. In their overview of projects in Moldova, Mongolia and Morocco, the authors conclude that social accountability initiatives worked when they brought actors together around a shared goal of raising learning outcomes, and “demonstrated a feasible way of solving concrete problems” (Guerzovich, Poli, and Fokkelman 2020, 31).

That the success of tools and strategies owes much to whether or not they can trigger a political response is demonstrated in several case studies. In the Dominican Republic, the “4%” campaign led by the Coalición Educación Digna (CED, Coalition for Education with Dignity) successfully advocated for increased spending on education, mobilizing broad and diverse constituencies (citizens, business, unions) to demand government action. A subsequent World Bank GPSA project aimed to build on the successes of the CED campaign to encourage civil society participation in budget and expenditure tracking and education policy dialogue, and to stimulate public demand for improved services. However, the World Bank-supported project suffered from ‘political economy challenges’ (Poli, Guerzovich, and Fokkelman 2019, 13): campaign activism

could not be sustained; complex matters of education expenditure were more difficult to resolve through voluntary work and consensus than had been the case with budget allocation; the project was unable to engage in policy dialogue with officials, after the success of CED's more contentious campaigning model; and the World Bank lacked the capacity to work with an innovative, civil society-led strategy (ibid.). Among the lessons from the Dominican Republic's experience with social accountability is the scope for "leveraging World Bank and other development partners' programming and operations as an entry point to integrate complementary citizen-led reform efforts." (Poli et al., 2019, p. 15). One conclusion is that social accountability programming needs to intentionally align ongoing aid-sponsored government reform efforts with civil society work, while also "maintaining civil society's autonomy to hold the government to account" (Poli, Guertzovich, and Fokkelman 2019, 16).

Similar conclusions were reached regarding community scorecard programs implemented by the international NGO PLAN in Malawi: assumptions that more information would elicit a policy response did not hold in a context where public authorities either lacked the capacity or the political will to respond to citizens' concerns. Reviewing social accountability projects in education, among other sectors, Wild and Harris found that scorecards worked best where they resulted in the creation of shared spaces for community members and service-providers could work together to solve problems, and where they have 'reignited communities' own capacity for self help alongside encouraging greater state responsiveness' (Wild and Harris 2012, 5).

Budget tracking and budget monitoring have become important strategies in civil society's advocacy toolbox, as activists seek to hold governments accountable for financing education. Budget tracking and monitoring exercises seek to ensure correct allocations of education expenditures, but also to raise public awareness about budgetary and expenditure processes and to increase the costs of government failures to ensure appropriate spending or to implement promised or mandated programs (Hevia *et al* 2020). They aim to incentivize behaviors that prevent corruption or negligence and improve budgetary performance, while engaging public interest in what is spent on education, and how (Carlitz and McGee 2013; Perry 2008; Girls Not Brides 2020; Lekweiry and Falisse 2022; Turrent 2009). Civil society budget tracking in education has monitored national and local budgeting, attempting to engage citizens at both levels in acting as watchdogs over education spending, with notable successes. One review found that in Bangladesh, Ghana, and Malawi, governments were under pressure to restore or implement spending plans as a result of revelations uncovered through budget tracking (Perry 2008). Budget tracking identified mis-spent textbook funds in Kenya (Perry 2008); in Uganda, budget tracking and activism identified 'ghost' schools and corruption in the local education administration (Turrent 2009).

The effects of budget tracking activism and advocacy are rarely simple technical improvements to the policy implementation process. Civil society activism on education budgets tends to succeed by triggering political responses, sometimes regarding the emotive issue of corruption or negligence around children's education. In their analysis of HakiElimu, the Tanzanian education and accountability organization, Carlitz and McGee note that in the relatively closed political and civic space of Tanzania, budget monitoring can be "a way into the more politically challenging and contentious advocacy arena of governance, accountability, and democratization" (Carlitz and McGee 2013, 1). HakiElimu's strategy is not to push for budget allocations to specific priority areas, but to 'raise the stakes' of government failures to do what they claim to be doing,

recognizing that the problem is less the policies than their implementation. Quoting Rakesh Rajani, the Tanzanian civil society leader, they argue that:

Governments do the right thing (or less of the bad thing) not because of compelling evidence, good policies or effective lobbying; but because it pays to do so or there is no way out. Accountability is political, not technical (Carlitz and McGee, 2013, p. 37).

Experience of members of the campaigning Girls Not Brides network indicated the need for both budget analysis and ‘strategic advocacy’, or “the ability to get the word out about a campaign, mobilise the public and reach out to policymakers and other stakeholders” (Girls Not Brides 2020, 4). Campaigns in Kenya, Nigeria, Pakistan, Chiapas State in Mexico, and Togo showed that civil society had a unique role to play as budget watchdogs, but also in translating technical budget information into user-friendly concepts and language. A delicate and constant negotiation between acting as critics and advocates and engaging constructively with governments was another feature of successful budget activism. Building and sustaining good relationships with broader constituencies (youth, other CSOs) and key actors in politics and the media was also important. But budget analysis and advocacy alone were insufficient:

Budget analysis helps form the evidence base for advocacy asks and shape the arguments needed to advance policy objectives. This budget analysis information can be used in tandem with other advocacy strategies: mobilising citizens – including young people – on budget issues; working with parliamentarians to push for budget-related decisions to be passed; working with the media to highlight weaknesses, bottlenecks and wastage in existing public budgets; working with oversight institutions that monitor expenditure and act as watchdogs on public financial management processes; and advocating for public access to budget-related information and documents (Girls Not Brides 2020, 12).

Learning outcomes

Innovative activism and research to improve learning outcomes has been an increasingly prominent aspect of the thematic focus of civil society in education. The literature on interventions to improve learning outcomes is large, but reviews and syntheses have arrived at divergent conclusions about the state of knowledge (Evans and Popova 2016). While the present review does not cover all potentially relevant literature,³ there are several well-known cases of civil society innovations to raise education quality that have scaled up and are understood to have influenced education policy and practice in governments as well as multilateral agency approaches. The most prominent is the Indian NGO Pratham, which has harnessed grassroots activism and organizational

³ There have been several high-quality reviews and synthetic studies of interventions to improve learning outcomes in the global South in the past decade (Snilstveit et al. 2015; Angrist et al. 2020). These approach their questions from different starting points and criteria, and (partly for these reasons) lessons about ‘what works’ to improve learning outcomes are contingent upon how the questions are framed and addressed, and presumably also on context (Evans and Popova 2016). These reviews do not enable us to answer the question in the present review about the role of civil society in national education policy for two reasons. First, the actors and institutions behind the ‘interventions’ and programs reviewed are undertaken by a mixture of government, NGOs, thinktanks and university departments (in particular, randomized controlled trials), and aid agency projects. It was not possible to distinguish the civil society interventions from those by government and multilateral interventions. Second, these reviews predominantly explore whether and how the interventions work to raise learning outcomes, not whether and how civil society interventions influence government policy or implementation.

capacities for learning and innovation with cutting-edge academic methodologies, and even boasts a pair of Economics Nobel Prize-winners among its champions and researchers (Banerji and Chavan 2020). Pratham's remarkably productive research partnerships with the Abdul Latif Jameel Poverty Action Lab (known as JPAL) have enabled it to devise, test and refine their approaches to improving learning outcomes. The learning has been disseminated beyond India and the academy through the work of the People's Action Learning Network (PAL Network).

Under the banner of 'every child in school and learning well', Pratham has devised and tested a series of models for raising learning attainments. Those that have scaled up successfully and replicated and adapted beyond India include the Citizen-Led Assessment (CLA) methodology, leading by ASER (Annual Status of Education Report), and the Teaching at the Right Level (TaRL) approach. ASER is a methodology for community-based assessment of student performance that uses but simple measures of student learning developed to enable community members and parents to understand the scale and nature of the learning shortfalls in their local schools:

[U]nless a problem was visible, people were not able to engage or react. It was clear that unless we were able to make the learning problem more visible and concrete, it would be difficult to mobilize around the issue (Banerji 2020, 49).

The approach involves working with local organizations, up to 600 of which have now partnered with Pratham. It has spread across India, involving hundreds of thousands of people since its inception, and between half and three quarters of a million children in each round (Banerji 2020). Those results are intended to inform local-level change, but also, in aggregate, to generate pressure on sub-national and national policymakers and political leaders to address the problems facing the education system more broadly (Banerji 2020; Banerji and Chavan 2016).

Pratham's Teaching at the Right Level is another pedagogical approach that emerged out of the lessons of the ASER experience, and seeks to encourage teaching to meet children where they are, rather than delivering a uniform grade-based approach. TaRL involves the setting of appropriate learning goals, simple assessment tools, and a mixture of interactive teaching practices, with children attending large and small group as well as individual learning sessions. The approach has been used to teach as many as five million Indian children in a year, and is being used in a growing range of other countries in the global South (Banerji, Agarwal, and Lakshman 2020).

Since 2009, the CLA approach has been adapted by Uwezo, the education initiative of Twaweza, the East African civil society movement, in Kenya, Uganda and Tanzania. Since then, the Citizen-Led Assessment approach has been adopted more widely, and with an explicitly South-South strategy for learning, across India, then to Pakistan, Kenya, Uganda and Tanzania, then Senegal and Mali, then Nigeria and Mexico, and more recently to Mozambique, Bangladesh, Nepal, Botswana, Nicaragua and Colombia (Alcott, Rose, Sabates, Cherfils, et al. 2018; Alcott, Rose, Sabates, and Cherfils 2018).

As with Pratham's programs, information is understood to be vital to citizen action, but not through an automatic or simple process:

[I]nformation can increase awareness, which in turn has the potential to harness agency and evoke action. This holds especially when information is presented in a way in which people can see its immediate link with their own life and well-being. Use of robustly generated evidence is therefore the entry point used for engagement in educational discourse. Uwezo has a basic literacy and numeracy pivot, through use of national assessments conducted by citizens and citizen groups. Citizens are viewed not simply as consumers, but also as generators of knowledge. Additional to this is the understanding that the “data will not speak for itself.” Heavy investment has been made to communicate, in simple and understandable formats, to key audiences, particularly policy makers and implementers but also ordinary citizens, the bulk of whom are parents (Sumra, Ruto, and Rajani 2015, 47).

These educational interventions are not understood as magic bullets or instant solutions: there is a recognition that the change involved takes time to build understanding and locally relevant solutions. Citizenship and the information and other resources to behave as citizens is crucial:

Critically, in Uwezo’s theory of change, the citizen focus is important in at least three regards. First, much can be done to improve literacy and numeracy by parents, children, teachers, and other ordinary citizens, even within existing constraints. Second, citizen engagement is essential to creating the public pressure needed to hold leaders and service providers to account, at both local and national levels. Third, the citizen focus creates for greater sustainability by diversifying interest, ownership, and follow-up among people who are directly affected by the poor state of learning, rather than becoming dependent on a few elite individuals (Sumra, Ruto, and Rajani 2015, 61).

While the literature on ASER provides robust understandings of how and why these work to generate local understandings and engagement with education issues, there has to date been less attention paid to whether and how it succeeds in generating the political commitment for adoption or policy change in public education at the national level. One analysis of the Kenyan media coverage of Uwezo found that the ‘shock value’ of poor learning attainments declined over time, and public opinion ended up blaming teachers or local culture for failures to improve over time (Monk 2020). However, recent analysis has started to fill this gap (Bano 2022; Bano and Oberoi 2020). Through a close analysis of the approach to mobilization used by Pratham, Bano argues that the approach presents a robust challenge to the now-standard international development agency approach to improving school performance, which has rested on the assumption that provided with information about school performance and otherwise empowered to act, school management committees (SMCs) will pressure schools and teachers to perform better. Bano’s insights includes that collective community pressure rarely results from empowered SMCs, and that the success of Pratham lies in part in the individual incentives of parents to ensure their children are learning, and their willingness to engage with schools to ensure they are receiving the right support to do so. Bano notes that Pratham succeeds to the extent that it is able to exert a broader influence over the national-level politics of learning (2022). This is in contrast to the standard ‘short route to accountability’ approach,⁴ which hypothesizes that the provision of

⁴ This is a reference to the World Bank’s 2003/4 *World Development Report: Making Services Work for Poor People* (World Bank 2003). This argued that services would work for people when they were able to hold them accountable, either in the ‘long route’, through voting and other kinds of pressures on political leaders to deliver

information about which services people should be receiving and are in fact receiving will be sufficient to galvanize people to pressure state actors to deliver better services. There are no shortcuts to public sector reforms to deliver appropriate school systems and pedagogies: bedding down the lessons from Pratham have taken time, careful and long-term engagement with sub-national bureaucracies and political regimes. It is not clear that aid-supported initiatives have the long time-frame or patience with slow progress and occasional reversals necessary to enable these changes to take hold in government systems (Bano and Oberoi 2020).

The “Teach for All” approach is another well-known civil society initiative to address learning outcomes, now involving a network of about 60 organizations, including in the global South. It aims to develop collective leadership to ensure all children can fulfill their potential, operating through a system of accelerated teacher recruitment and training. This network has expanded and inserted itself into many national discussions on education policy, particularly teacher policy (Straubhaar and Friedrich 2015). A systematic review by McConney *et al* (2015) showed the potential and limitations of the influence of this network on teacher policies. It had expanded and gain rapid recognition among universities and donors, including by generating evidence to analyze its own effectiveness, there were also potential adverse effects on teacher retention, and the approach was not necessarily aligned with labor policies (McConney *et al* 2015).

6. Civil society strategies

In this section, we synthesize evidence about the range of civil society strategies used to influence national education policy, illustrated with brief case studies from selected groups or coalitions.

The evolution of civil society strategies

From the literature review it is possible to distinguish between four categories of civil society strategy with respect to national education policy:

- i. Movement-building, including building civil society capacity, coordination, networking and constituency mobilization around policy issues, including the ‘cultural work’ of framing or norm-setting
- ii. Policy engagement, featuring insider strategies and ‘constructive engagement’, exercised through seats at the policy table
- iii. Pilots and ‘proof of concept’ initiatives using research & evidence, data and information to trigger / inform reforms and pressure state actors; and
- iv. Contention or mobilizing countervailing power (e.g. student or labor movements).

These categories map onto the repertoires identified by Novelli and Verger in their important volume analyzing the civil society coalitions that worked on national education policies within the EFA framework:

which were then exerted in turn on frontline service providers, or through the ‘short route’, through the exercise of informed choice and monitoring of frontline service providers directly.

Most education coalitions analysed deploy a range of common action repertoires including: a) Lobbying decision-makers (by, for instance, arranging meetings and sending letters/emails to decision-makers); b) public awareness through public speeches, information campaigns and media releases; c) mobilization and street action; d) activist research, including budget tracking, studies on the state of education in the country, etc. (Verger and Novelli 2012, 162).

Most organizations and coalitions about whom published studies were found combine these strategies to different degrees. Most tend to deploy one as their leading strategy, and the literature uncovered few examples of contentious repertoires to mobilize or demonstrate countervailing power other than those by teacher or other labor unions and student movements. The choice of strategy is determined by the issues discussed in previous sections of this literature review:

- the character of the civil society actors and institutions themselves, including their constituencies and capacities to engage;
- the political and aid contexts in which they engage, including the space created by the state (as social movement and civil society theory would predict (Houtzager 2003), and by international aid frameworks, and
- the policy issues on which they seek to engage, in turn reflective of both what the priorities are, and civil society capacities to engage on those issues.

The explicit inclusion of aid actors within a civil society theoretical framework reflects the fact that it is not only the national state that enables (or restricts) civil society action in the global South:

[I]n low-income contexts, there is a bigger presence of external actors, including international NGOs, donor agencies and international organisations (IOs) that have a great capacity – both material and ideational – to set agendas and priorities for a particular country (Verger, Altinyelken, and Novelli 2018, 5).

With this framework, it is possible to see that civil society strategies are not simple choices in the moment, but reflect the accumulation of institutional characteristics and capacities, member constituencies, and experience and expertise, and how those are organized to meet present challenges within a shifting regime of rules. The Novelli and Verger edited volume *Campaigning for Education For All: Histories, Strategies, and Outcomes of Transnational Advocacy Coalitions in Education* (2012) provides longitudinal analysis of the evolution of these strategies, illustrating the conditions of the EFA Dakar Framework and related global policy agendas under which different modalities were adopted, and the thinking behind those choices.

Civil society coordination and capacity

Coordination and capacity development are critical to civil society strategies in education. In a comparative study of civil society coalition strategies and effectiveness within sector wide education programs in Kenya, Burkina Faso, Tanzania and Mali, Mundy *et al* found that investments in coordination and capacity within the network was a key factor in their effectiveness, and that ‘historical divisions and tensions’ between international and national NGOs and with teacher unions undermined their capacities to act collectively (Mundy et al. 2010, 493). The CSOs in the four countries struggled to reach out beyond their national policy networks of ministries of

education and aid actors, to communities, parents and citizens, parliamentarians, and teacher unions, and missed out on ‘the crucial opportunities for expanding public engagement offered by constituency-based organisations’ (Mundy et al. 2010, 495). Failure to engage with parents and teacher unions undermined the sustainability of any policy gains.

Good coordination and capacity without strong national ownership may not yield influence on national policymaking, however, as analysis of the Ghana National Education Campaign Coalition (GNECC) showed. The GNECC was set up in 1999 with international NGO support, but national civil society campaigning also had strong domestic roots and a longer history (Strutt and Kepe 2010). GNECC successfully strengthened its organizational core, including democratizing its own functioning. It established District Education for All Teams, district-level volunteers who advocate for and track education spending in over one-third of all districts. Their research and advocacy on budget monitoring, the capitation grant, and girls’ inclusion were well-received and they were recognized by the government, who included them in policy spaces and political dialogues (Strutt and Kepe 2010). However, their influence on national education policymaking and implementation suffered from a lack of ownership of the agenda and confusion over the goals:

As a partner in the international EFA campaign, GNECC did not stem from the impetus of Ghanaian communities, but rather as a nationally situated component of an international campaign. The result is that GNECC’s agenda has become too broad and all encompassing, creating confusion amongst its members about the intent, and their role within, the coalition’s work (Strutt and Kepe 2010, 373).

Policy engagement

Several civil society strategies highlight the importance of relatively ‘quiet’ forms of policy influence, through ‘constructive engagement’ on policy dialogue and education programs. This is illustrated by the trajectory of the international NGO ActionAid, which evolved from a primarily service-delivering organization at its founding in 1972, to one focused on strengthening national constituencies’ capacities to demand and secure their education rights by 2009 – but within a ‘constructive engagement’ approach:

Sometimes, NGOs taking a rights-based approach are seen by governments as threatening and unwelcome, but when it is done well, it can lead to highly constructive relationships. After all, the rights-based approach is premised on the belief that it is government action, not NGO provision, which will make the difference in securing education for all. (Archer 2010, 617).

Rose (2011) found that South Asian NGOs tried to avoid serious conflict with government, combining supportive service provision with advocacy, building enduring relationships over time. They did not see it as their role to take over from the state, but to nudge it towards improved provision for the hard to reach:

[C]ooperative relationships in service delivery can promote ‘persuasive advocacy’. The organisational motives of the selected NGOs influenced how closely they engaged with government in both service delivery and advocacy aimed at improving government provision. Recent studies of education NGO–state relationships in sub-Saharan Africa

support the findings of our research that NGOs often engage in service delivery and advocacy simultaneously. (Rose, 2011, p. 295)

Analysis of the national education coalition in Cambodia, NGO Education Partnership (NEP) found that cooperation could end up as cooptation, and they had to juggle their relationships to avoid outright conflict:

Civil society organisations must carefully walk the line between participation in government or development partner-lead processes that, by their nature, legitimise those processes, and participation that pushes for more socially just policies, though this is often a delicate balance ... managing these tensions can be more difficult when teachers' unions are involved, but excluding them comes at a cost (Edwards, Brehm, and Storen 2018, 184).

The case of NEP showed that 'progress in advocacy, involvement, legitimacy and impact is possible for national NGO coalitions when receiving transnational support and through the employment of certain strategies, even in repressive conditions'; however, there were questions about the autonomy and endurance of these coalitions over time and beyond aid (Edwards et al., 2018, p. 184-185).

A case study of E-Net in the Philippines, the national education coalition, identified multiple instances of success in its efforts to advocate for education policies (Hoop 2012). Civil society had not been part of the government's initiatives to reach EFA after the Dakar conference, and it was only through Oxfam that meetings between E-Net and the ministry were arranged. Civil society played a minor role in the first EFA decade (the 1990s) and there was a recognition of the need for "a broad network to rally around education issues" (pp. 37). E-Net was set up with Oxfam GB funding, but with latitude for the agenda to be set by its constituent CSO members who had been working on education. Members carried out research on education financing and alternative education systems and conducted consultations to identify priorities and concerns. E-Net has a broader, more encompassing vision for education than most international agreements, which focus on primary or basic schooling. Its members comprise NGOs, individuals, teacher unions, grassroots organizations, academics and the media. E-Net had active ties with both GCE and the Asia-Pacific regional coalition ASPBAE, which gave it access to international and regional platforms and allies.

E-Net deliberately chose a centrist strategy as the most likely means of influencing reform:

As civil society participation gained international importance, E-Net was the civil society party the government could intervene with regarding education. E-Net agreed to push for public education system overhaul, instead of revolutionary transformations ... the call for mass-oriented, nationalist education was left to political groups, while E-Net decided to push for reforms within the public education system ... The aim was to build partnerships with the Department of Education and other allies as E-Net believes that in order to obtain the best education for all, many different EFA constituencies and advocates are needed on many different levels (Hoop 2012, 38).

Political opportunities for E-Net were created by the People Power revolution, after which presidents have positioned civil society leaders in the education administration. Giving civil society direct access to government actors. E-Net has reflected on and adapted its strategies over time, recognizing the importance of the ‘localization’ of EFA strategies, and starting to work more with local government, parent-teacher groups and other local stakeholders. Key successes include building a broad constituency with a range of different actors around a common agenda. This includes teacher unions, which have a strong relationship with NGOs in part because they are fragmented and (therefore) unable to dominate policy debates. E-Net has influenced political debates about education through its Alternative Budget Initiative which conducts research, identifies financing gaps, and campaigns for strategies to fill them. The Initiative was permitted to participate in budget hearings, and their ‘constructive interventions’ led to improved allocations to education and health. E-Net also supported bills to improve teacher benefits, for multi-lingual education, and localized initiatives for marginalized groups facing education challenges. They also achieved ‘procedural impacts’, relating to the inclusion of E-Net in, for instance, as the co-chair of the national EFA committee, and ‘symbolic impacts’ through shaping public opinion, notably in favor of EFA (Hoop 2012).

Evidence-based strategies

See the sub-section above on ‘Learning Outcomes’ under the Thematic/Focus Areas which summarizes some of the literature on the innovative approaches to improving learning outcomes drawing closely on evidence and data from members of the People’s Action Learning Network (PAL Network), as well as Pratham (CLA and TaRL).

An interesting and well-documented example of a civil society evidence-based strategy that specifically and explicitly sought to influence national education policy is that of *Mexicanos Primero*. Cortina and Lafuente note that it emerged as a new kind of civil society organization, backed by corporate funders, but with the aim of advocating for education policy reforms. It had arisen as a collaboration between academics and business leaders with philanthropic backgrounds in education services in the 1990s, at a time when the ruling party was closely allied to and politically beholden to the teacher unions, constraining the education reform agenda (Lafuente and Cortina 2018). Policy research and advocacy were the core elements of their strategy, but they combined other activities into what became a highly influential role:

In 2012, when President Enrique Peña Nieto, from the PRI, was elected and then took office, Mexicanos Primero continued to serve as a government ally in the creation and implementation of educational reforms. Many times, however, the CSO was a difficult ally since its constant criticism about policy implementation was not welcomed. The new president put education at the top of his agenda in his first address to the nation, on December 1st, 2012 (Programa de Acompañamiento Ciudadano, PAC, 2013). Before that, on October 3rd, 2012, Mexicanos Primero continued its research activities, developing an extensive program, Metas 2012 to 2024 (Goals 2012 to 2024), for the new president. At the same time, Mexicanos Primero’s team increasingly added policy-monitoring components to its repertoire of activities, assessing and overseeing education policy outcomes and implementation. Since then, the organization has been an active watchdog tracking the implementation of education policies, targeting overall educational reform, teacher evaluation and professional development, and promoting a reduction of SNTE’s

influence and leadership in public education in Mexico. In addition, as described in the sections below, Mexicanos Primero gradually refined its initial strategy of change by adding new components, including a legal approach and social advocacy work (Cortina and Lafuente 2018a, 21) .

Recognizing that civil society groups “tend to invest more energy and resources to being accountable to donors” than to teachers, parents and students, Lafuente and Cortina also studied the accountability practices through which Mexicanos Primero sought to hold themselves accountable to the constituencies for whom education is most vital.

A case study of the *Circuitos de Aprendizaje* program in Colombia analyzes the ‘political advocacy strategy’ through which the approach was scaled up by the government (Vega-Chaparro 2018). The program was an adaptation of the *Escuela Nueva* model of high quality cost-effective rural multi-grade schools, specifically geared towards children from marginalized communities, notably people who were displaced internally as a result of the conflict. It was set up by the *Fundación Escuela Nueva Volvamos a la Gente* (FEN), a Colombian non-governmental organization (NGO), and “scaled up nationally by the Ministry of Education because of the positive results demonstrated in the pilot phase of the program” (pp. 85) in order to “restore the right to education of internally displaced children” (Vega-Chaparro 2018, 88).

After the successful pilot, the government decided to scale up the program nationally because it had itself no plan for educating the internally displaced children; because the program had been clearly effective in its pilot stage; and because FEN’s advocacy on behalf of the education of marginalized children had been highly effective. FEN’s founder was close to the Minister of Education, and took her to visit the schools personally. However, there were a number of implementation challenges in the scale-up process: ministry officials were over-confident but lacked capacity; program implementors were under-resourced and overly focused on technical and logistical issues at the expense of students’ needs and program quality; regional teams tasked with coordination and oversight lacked ownership; teachers lacked adequate training, support, and pay; and the overall emphasis of the program was on scale rather than on quality. FEN has since adopted new principles of partnership for any future efforts to scale up their innovations, including a memorandum of understanding with the government, and stronger guidance and participation by FEN in the scaling up process (Vega-Chaparro 2018).

Contentious politics

Education features extensively in accounts of contentious politics (Douglas McAdam, Tarrow, and Tilly 2001). Schools and universities tend to provide a safe space for organizing by students, or about education, even in nondemocratic regimes (Morris 1984; Doug McAdam 1988; Zhao 1998). Student and youth movements in Chile, for instance, offer rich insights into contentious political strategies by civil society to influence national education policy. A study of the 2006 and 2011 Chilean student movements noted the strong influences on the politics and policy decisions regarding education, particularly with respect to ameliorating or addressing some of the social and economic inequalities, high out-of-pocket costs, and profit-making that had emerged in Chile’s market-oriented education system. Although enrolment, participation and learning outcomes improved since the mid-1990s, students protested against the consequences of the market-oriented system; evaluations of the system indicate that the conclusions are ‘not positive for market

proponents' (Bellei, Cabalin, and Orellana 2018, 67). In 2006, high school student protests were triggered by demands for transport passes, but soon escalated into broader demands for free education, defense of public education, rejection of profit-making schools, and removing discriminatory education practices. In 2011, one of Chile's historic university student movements took place over seven months of protests. Students mobilized against student debt and university fees, and the effective privatization of higher education. Their strategy included building coalitions with teacher unions and other labor unions as well as broader civil society movements:

The political strategy of the movement allowed for the integration of different social demands in a national movement for education (Bellei, Cabalin, and Orellana 2018, 72).

The student movement became part of "a new generation of political actors in education" pp. 73, whose political activism had emerged out of the experience of life under democratic rule, after the end of the authoritarian Pinochet regime. The modes of mobilization included new combinations of traditional student councils with looser student assemblies, with innovative organizational practices that included horizontal and democratic deliberative processes. Coordination mechanisms were also new, featuring instant messaging and other new technology, making it possible to mobilize and organize rapidly and across space. And students used a range of strategies - cultural and audiovisual repertoires as well as more traditional protests and demonstrations. Students successfully articulated not only short-term demands but also longer-term structural reform agendas, and "strongly affected both policy debate and the policy decisions" (Bellei, Cabalin, and Orellana 2018, 77). All of this took place within an increasingly globalized education policy setting:

The shift toward increased participation by local actors in the education policy process proceeds in a direction opposite to that of the international organizations in the education policy field, whose growing relevance is well documented. In fact, education policies have become enmeshed with the new dynamics of globalization, where the main concern is to increase economic competitiveness ... Nevertheless, since public policies can also express a collective will to solve social problems, the 2006 and 2011 student movements reminded Chilean policy makers that—despite a globalized policy field—they are still socially and locally accountable (Bellei, Cabalin, and Orellana 2018, 80).

In another example from the region, the Landless Workers Movement (SMT) in Brazil campaigned for rural education reforms over two decades, in what Tarlau describes as a form of 'contentious co-governance' (2019). The proposed and tested models for village schools were eventually adopted as the policy model for rural educational expansion in Brazil, in one of the rare cases identified in which primarily contentious forms of civil society activism created enduring pathways into institutions of the state.

Aid relations can defuse and depoliticize campaigns for education: a case study from Nepal highlighted the risks of the depoliticizing effects of aid on civil society, noting that the emergence of aid-financed organizations failed to represent people's concerns, and in so doing may have paved the way for the Maoist insurgency (Rappleye 2011). Nepalese civil society grew rapidly after the opening up enabled by the People's Movement / Jana Andolan in 1990, which saw the

end of the restrictive Panchayat system and a new Constitution. These new groups attracted large aid flows, on which some became dependent:

the result of civil society engagement by donors and governments is not the celebrated voluntarism of civic association, but the construction of a civil society that has become a conduit of exogenous policy influence, a new mechanism of educational transfer, and, ultimately, a de-politicising entity that contributes to the further entrenchment of external influence in Nepal ... these dynamics may render Nepalese civil society unable to respond to and voice legitimate political demands within the country, with obvious implications for the emergence of a very different kind of voluntary civil society organisation: the Maoist insurgency (Rappleye 2011, 28).

Aid was a major determinant of the role played by civil society in national education policy spaces in Nepal. Evidence suggests that some prominent and influential groups that were 'incubated' by donor programs ended up being driven by donor imperatives rather than the agendas of grassroots constituencies. Powerful civil society organizations were established "that did not represent the most pressing concerns of the Nepalese people but yet mistook this constructed NGO sector as the 'authentic' voice of the Nepalese people", leading ultimately to the depoliticization of civil society which "pushed the discontented into the arms of the Maoists" ((Rappleye 2011, 46). However, others argue that Nepal's Education for All Movement reflected domestic political agendas and emerged out of the specific context of democratization (Bhatta 2011).

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