

# The World Bank and Education

## Critiques and Alternatives

Steven J. Klees, Joel Samoff  
and Nelly P. Stromquist (Eds.)

Foreword by Robert F. Arnove

with contributions by

Xavier Bonal, Mark Ginsburg, Anne Hickling-Hudson,  
Sangeeta Kamat, Bjorn H. Nordtveit, Susan Robertson,  
Angela C. de Siqueira, Crain Soudien, Carol Anne Spreen,  
Gita Steiner-Khamsi, Salim Vally, Antoni Verger



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## THE WORLD BANK AND EDUCATION

# COMPARATIVE AND INTERNATIONAL EDUCATION: A Diversity of Voices

Volume 14

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# The World Bank and Education

## Critiques and Alternatives

*Edited by*

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## FOREWORD

This remarkable volume brings together the most consistent and thoughtful critics of World Bank education policies and practices over the past three decades. Since the World Bank emerged as the major intergovernmental agency funding education change initiatives around the world in the mid-1980s, these scholars have systematically examined the potential of the World Bank to benefit or harm the development agendas of low- and middle-income countries. They have provided penetrating and comprehensive critiques of the evolving priorities, strategies, values, rationales, discourses, processes, and outcomes of the World Bank. They have pointed out the narrow economic and utilitarian goals set for education, the limited and misleading input-output and cost-benefit analyses employed, the inadequate knowledge base on which decisions are made, the failure to take into account the context as well as the voices of the intended beneficiaries of proposed reforms of education systems, and the general neglect of teachers and the conditions that would enhance their work. The book is particularly timely with its focus on the *Education Strategy 2020* document issued by the World Bank in 2011. Not satisfied with criticizing missteps and missed opportunities, they also offer alternative visions of what education is and can be. The various authors provide useful suggestions as to how the World Bank, with its enormous resources and strategic position in influencing economic and education agendas, can contribute to policies that are more appropriately geared to strengthening the potential of countries to determine their own paths to poverty alleviation and to individual and societal flourishing.

Over the years, the critiques and alternatives found in the book have been presented directly to World Bank officials at international professional conferences, notably those of the Comparative and International Education Society (CIES), at think tanks, such as the Brookings Institution, and at invitational meetings at World Bank headquarters. Whatever interest the World Bank's education program officials might have in adopting the recommendations offered by progressive scholars is structurally and ideologically tempered by these considerations: the World Bank, after all, is not only a financial institution, but a key actor in determining the architecture and workings of the global political economy; the lion's share of the World Bank's funding comes from the United States, a superpower persuasively promoting the neoliberal economic agenda since the 1980s; and it exhibits the reluctance or inability of an entrenched bureaucracy to admit its errors and learn from past mistakes. Whether the Bank is responsive to the critiques and alternatives brilliantly offered by the present authors, the book is certain to influence development and education scholars, policymakers, and practitioners around the globe. The insights, lessons, and visions contained in *World Bank and Education: Critiques and Alternatives* provide ways in which decision-makers and educators can more effectively respond to external forces on

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their societies and take action to shape more equitable education institutions, policies, and practices that reflect their existential realities. Kudos to the editors and authors for this most significant contribution to scholarship and praxis in the realms of education and social change.

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## ABBREVIATIONS

AAWORD	Association of African Women for Research and Development
CIDA	Canadian International Development Agency
DANIDA	Danish International Development Agency
DAWN	Development Action for Women Network
DFID	Department for International Development (U.K.)
EFA	Education for All
EKMS	Education Knowledge Management System
ICAE	International Council for Adult Education
ICTs	Information and Communication Technologies
IFC	International Finance Corporation
IMF	International Monetary Fund
MDG	Millennium Development Goals
NGOs	Non-Governmental Organizations
OECD	Organization for Economic Cooperation and Development
PIRLS	Progress in International Reading Literacy Study
PREAL	Programa de Promoción de la Reforma Educativa de América Latina y el Caribe
PRSP	Poverty Reduction Strategy Papers
REPEM	Red de Educación Popular entre Mujeres
SABER	System Assessment and Benchmarking for Education Results
SAL	Structural Adjustment Lending
TIMMS	Trends in International Mathematics and Science Study
UN	United Nations
UN Women	UN Entity for Gender Equality and the Empowerment of Women
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development
WEDO	Women's Environment and Development Organization
WHO	World Health Organization
WTO	World Trade Organization



## CONTRIBUTORS

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*Mark Ginsburg* is a senior advisor for research, evaluation, and teacher education in the Global Education Center of the Global Learning Group at FHI 360 (formerly Academy for Education Development); a visiting professor at Columbia University and University of Maryland; and coeditor of the *Comparative Education Review*. He has published extensively on topics of policy/institutional reform, globalization, teachers' work, teacher education, and policy/practice-oriented research and evaluation.

*Anne Hickling-Hudson* is associate professor at Australia's Queensland University of Technology. Born and raised in Jamaica, she was educated at universities in the West Indies, Hong Kong, and Australia, and has been a pioneer in applying postcolonial theory to the comparative analysis of educational change and national development. She is recognized for her national and global leadership role in academic associations of education, especially as past president of both the World Council of Comparative Education Societies and the British Association of International and Comparative Education.

*Sangeeta Kamat* is associate professor in education policy studies at the University of Massachusetts at Amherst. Her publications include *Development Hegemony: NGOs and the State in India* (OUP, 2002) and several articles on globalization and education, the politics of international aid, and Hindu nationalism in the diaspora. She is presently researching the growth of private higher education in India and its regional impact.

*Steven J. Klees* is the R. W. Benjamin Professor of International and Comparative Education at the University of Maryland. His work examines the political economy of education and development with specific research interests in globalization, neoliberalism, and education; the role of aid agencies; education, human rights, and social justice; the education of disadvantaged populations; the role of class, gender, and race in reproducing and challenging educational and social inequality; and alternative approaches to education and development.

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## CONTRIBUTORS

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*Joel Samoff* is an educator, researcher, and evaluator with a background in history, political science, and education. Since 1980 a faculty member at Stanford University, currently at the Center for African Studies, he has taught at the Universities of California, Michigan, and Zambia and in Mexico, South Africa, Sweden, Tanzania, and Zimbabwe, is the North America Editor of the *International Journal of Educational Development*, and serves on the editorial boards of the *Comparative Education Review*, the *Journal of Educational Research in Africa*, and the *Southern African Review of Education*.

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dynamics among educational policies and practices, gender relations, and social change. She has written several books and numerous articles. Her most recent books include editing *The Professoriate in the Age of Globalization* and writing *Feminist Organizations and Social Transformation in Latin America*.

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## INTRODUCTION

For decades, the world community has agreed that education matters. However development is defined, education is at its core. Since at least 1948 (when the Universal Declaration of Human Rights was enacted) the world has agreed that everyone has a right to education. Yet in the 21<sup>st</sup> century millions of young people and adults have no or very limited learning opportunities. Rather than liberating the human spirit and fostering individuals' and societies' development, far too often and in far too many places education systems entrench inequalities and are more concerned with inculcating obedience than with nurturing democratic participation.

Over the past three decades or more, the World Bank has sought to play a major role in education, both directly in the countries to which it lends and indirectly much more broadly. With what has become a large staff of employed and commissioned economists and educationists and an education research and communications budget that far exceeds the resources available to most universities and research institutions in less affluent countries, it has worked to situate itself as the architect, implementer, and enforcer of global education policy. In that role, sometimes it collaborates with other organizations, but more often it insists that others follow, pointing to its research to justify its authority.

The World Bank's enthusiasm for its own policy pronouncements and practical advice has not been matched by sustained progress in the implementation of education as a human right or in the achievement of quality education for all in the settings in which it is most active. Regularly, its recommendations are a problem, not a solution. Of course, the determinants of education progress are multiple and situational. Still, since the World Bank intends its education policies and strategies to be prime movers for global education, it is essential to subject them to systematic, grounded, and critical scrutiny.

This book is a broad critique of World Bank policies and, in particular, of its recently released *World Bank Education Strategy 2020. Learning for All: Investing in People's Knowledge and Skills to Promote Development* (hereafter *WBES 2020*). The World Bank periodically produces a new education sector document, some formally designated as policy, others termed strategy or review, all intended to shape education policy and practice in countries where the World Bank is active. Such documents are extremely influential as they reach policy and decision makers in countries that borrow from the World Bank. These documents reach as well a large audience of educational practitioners and other lending institutions that work closely with the World Bank, both through handsomely produced free distributions and through the World Bank's website. Unquestionably, the World Bank's education sector policies are used as a key referent in negotiations and decisions by lending countries.

Closely watched by both practitioners and academics, the World Bank's perspectives, political strategies, analyses, and proposals have regularly been

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challenged by scholars representing the disciplines of sociology, economics, political science, cultural studies, critical studies, and education, among others. While previous critiques of World Bank education policy have generally appeared in individual articles, this book brings together for the first time a group of some of the most widely known observers of the World Bank's education policy. All the authors in this book have engaged in rigorous comparative research in developing countries. They are also familiar with policy developments in industrialized countries and how ideas and experiences from the North are routinely channeled to less wealthy countries without first subjecting these ideas and experiences to careful assessment of what they offer and what they in fact accomplished in their original settings. Our efforts here seek to raise a group of significant voices to question and reflect upon what the World Bank recommends with claimed demonstrated positive results for educational systems in all parts of the world. We find it timely and essential to focus our collective efforts and experience (from Asia to Africa and Latin America) on examining what purports to be the most authoritative source of education policy.

The new strategy was announced in 2011 with many participatory claims. Through the work of 15 scholars, the collective response developed here seeks to examine both the surface and the underlying texture of *WBES 2020* by unpacking the arguments it presents, the evidence it brings to bear, the theories on which it builds (or fails to build), and—most of all—its education prescriptions based on its version of “knowledge.” While *WBES 2020* remains a focal point of most chapters, all offer a more encompassing critique of World Bank education policy than that embodied in the current strategy. *WBES 2020* does not actually offer much in the way of a change in the prescriptions that the World Bank has been touting for over the past 30 years, during which neoliberal doctrine has dominated. Therefore, the critiques offered in this collection also have implications far beyond the World Bank as they are responses to the neoliberal global education policy recommendations that have dominated for several decades in developed and developing countries alike. We believe that this collective response is more important than ever given the ever stronger dominance of neoliberal policies in general, and, in particular, the World Bank's ascending role as an undisputed influential actor in education, often more so than UNESCO.

This book is organized in four parts: framing the issues; learning, assessment, and the role of teachers; research and policy; and reshaping the future. The chapters in each of these areas build on the contributors' research strengths and provide a deeper look and keen insight into specific educational aspects touched by World Bank policies. To do so, the chapters cover both theoretical and empirical ground, as manifested in the broad educational literature and in the World Bank's framing of issues and solutions.

### FRAMING THE ISSUES

We begin the book with an account of the process by which the World Bank claims legitimacy for its policy recommendations. In these days of increasing importance

attached to democracy, invoking participation in decision-making—and, in this case, in policy formulation—should be welcomed. World Bank authors assure us that the development of the new strategy was subject to an extensive consultation process, with World Bank staff meeting with more than a thousand individuals in gatherings held around the world. Once produced, this strategy has been disseminated around the world with physical copies of the strategy distributed to people all over the world who work on educational projects. But what was the nature of the involvement and what were its consequences? The chapter by Gita Steiner-Khamsi traces in detail the four-stage process by which *WBES 2020* was developed and examines the attempt to secure global and broad stakeholder review systematically pursued by the World Bank. Although the World Bank sought external review of its proposals by holding many meetings with a large array of stakeholders, including government officials in partner countries, representatives from civil society, and business leaders, Steiner-Khamsi finds little similarity between the feedback provided to the World Bank and the final strategy it selected. She asserts that, as in previous instances, the World Bank followed a strategy of “rhetorical harmonization,” a phenomenon she attributes to the self-referential system endorsed by this institution. Her chapter raises questions about the emerging international aid architecture, one in which the World Bank is assuming uncontested leadership of its peer institutions.

In the chapter that follows, Bjorn Nordtveit engages in a meticulous examination of the discourse used by the World Bank document. Exploring the intentional use of discursive strategies—that include the selection of particular terms and their frequency, the claims made about having learned “lessons” from past experiences, being a “knowledge bank,” and basing its findings exclusively on “research”—Nordtveit deconstructs the architecture of a document aimed at persuading readers to accept its worldview of education and development. He also notes how the absence of certain terms and the recurrent portrayal of education as an investment and not as a human right conveys through sentimental as well as diagnostic linguistic devices what is essentially a particular ideology backing World Bank claims about the nature and role of education in society.

Sangeeta Kamat’s contribution addresses the World Bank’s new system approach to education policymaking, which purports to provide a more integrated comprehensive approach that will accomplish the mission of “learning for all” by 2020. The distinctive feature of the system approach according to the World Bank is the recognition that learning occurs outside formal education systems and that non-state actors, including private investors, faith-based groups, individuals, and communities are part of the education system. Kamal’s analysis shows how the system approach remains faithful to neoliberalism, i.e., a market-driven approach to education policy that contradicts the stated mission of “learning for all.”

Closing the first part of the book is the chapter by Steven J. Klees. Exposing the World Bank’s neoliberal ideology, Klees demonstrates that this institution persists in its unshakeable endorsement of neoliberal principles despite multiple studies that show serious negative consequences attached to this approach. In this way neoliberalism functions as a de-facto ideology rather than as a sound economic

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approach to development and the World Bank, as a consequence, continues to ignore other productive approaches to education and development. Klees traces the World Bank's recommendations regarding learning, reading, testing, and user fees as well as its self-appointed mission as a "knowledge bank." On the basis of previous practices and empty rhetoric, the World Bank is found to be unfit to serve as a knowledge bank or even to provide evidence-based advice on critical educational issues.

## LEARNING, ASSESSMENT, AND THE ROLE OF TEACHERS

This part of the book focuses on educational issues. Here, the question of learning acquires center stage, since *WBES 2020*, after all, intends to promote the acquisition of knowledge by all. Deconstructing the learning architecture proposed by the World Bank, Angela de Siqueira initiates this section by zeroing in on a core strategy of *WBES 2020*, the one dealing with the System Assessment and Benchmarking for Education Results (SABER). This strategy, which comprises 13 policy domains, proposes a conceptual framework and diagnostic tools for each policy domain, and in doing so it offers a "one-size fits all" solution. Siqueira engages in content analysis to examine three of the policy domains (assessment, education finance and engaging the private sector, and teachers). On the basis of the recommendations for these three policies, Siqueira identifies likely negative consequences for learning and teaching, as the World Bank domain strategies are likely to bring an iron-clad standardization of objectives and functions that rejects the need to consider the social and economic context of many developing countries, installing instead an overwhelmingly Western-based model of education.

Teachers, an essential party to the process of learning, should receive a major share of the attention in the consideration of educational policies. Without them, little can be accomplished at the classroom level—the closest setting in the process of formal learning. And yet the fundamental role of teachers is often disregarded. The contribution by Mark Ginsburg focuses on teachers and examines *WBES 2020* from the perspective of what it means and advocates for these professionals. It finds that the current sector strategy gives some attention to teachers. However, they are mainly defined as human resources or human capital, requiring targeted investment. This contribution to the proposed volume critically analyzes how teachers are characterized in *WBES 2020* as well as in selected prior World Bank documents (1995 and 1999). It also presents an alternative image of teachers—as human beings—for whom opportunities to learn need to be structured into education systems so that daily life in schools builds learning communities for educators as well as students.

In recent years, quality has been receiving a great deal of discursive attention. It is frequently said that access to schooling without quality is an empty exercise, for students who do not learn have not really benefited from schooling and will likely not reap the benefits that ideally accrue to formal education. Quality is precious and one would hardly find any one who does not want schools to be of high quality. But how do you determine that the education provided is good and

relevant? Whose standards and criteria are to prevail? The purpose of Crain Soudien’s contribution is to interrogate the meaning of “quality” in the *WBES 2020*. Soudien argues that while the new education sector strategy repeatedly emphasizes the importance of an education that is holistic and meaningful, there is clear evidence of the difficulty in substantively realizing these qualities—“holistic” and “meaningful”—through the transnational standardized benchmarking tests the World Bank proposes. The chapter examines the degree to which tests such as TIMMS and PIRLS have been able to develop frameworks of value which are, first, sensitive to differences across boundaries and, second, able to provide educational systems across the world with the guidance that will enable them to create conditions in which learners everywhere will flourish.

Closing the second part of the book is a reflection on learning by Joel Samoff. At first glance, *WBES 2020* seems to mark significant progress: from attention to education for all to a focus on learning for all. In practice, however, there is very little research or analytic attention to the learning process. Instead, Samoff finds a learning model whose narrow focus on acquiring knowledge and skills leaves little space for learning defined as the initiative, actions, and responsibility of learners, or for developing competences like framing problems, developing concepts, and drawing inferences—all essential components of a broader understanding of learning and critical for development. That orientation is reinforced by the World Bank’s uncritical adoption of a schooling model designed to educate elites. The learning model and schooling models combine with the World Bank’s efforts to deprofessionalize the teaching corps, apply a technocratic management approach, and support privatization to constitute fundamental obstacles to achieving learning for all. Moreover, that combination reinforces and entrenches systematic inequalities across society.

## RESEARCH AND POLICY

The global education community regularly reiterates the importance of developing and maintaining a strong link between research and policy. Essential are theoretical frames resting on grounded research that makes explicit the connections underlying policy recommendations. Action without understanding is unlikely to be effective, and theories without empirical support are generally poor guides to action. The chapter by Verger and Bonal calls our attention to an ostensible shift in the World Bank moving from emphasis on educational access to a concern for learning. The authors find that *WBES 2020* seems more disposed to abandon its position that there is a trade-off between equity and quality and more willing to recognize that more equitable systems achieve better results. However, upon further reading of the Bank’s new education strategy, Bonal and Verger find that little has been changed. There is still a very inward view of education that gives much weight to economic and technical factors while ignoring contextual issues that greatly affect education. The Bank’s position in favor of standardized testing and private schooling remains, and these two strategies are held to be the key

## INTRODUCTION

mechanisms to ensure learning and efficiency in schooling, irrespective of varying cultural and social contexts.

The second contribution in this part of the book is provided by Joel Samoff, who shows that, notwithstanding the World Bank's insistence on evidence-based policy and practice and its insistence that learning is now to be the primary focus of education support efforts, *WBES 2020* reflects very little evidence and research on the learning process. For the most part, what happens in schools and classrooms remains unaddressed, ignored in favor of attention to inputs, outputs, and the education system. At the same time, reinforced by its inclination to rely on research that it has commissioned or supported, the World Bank seeks to impose a constraining methodological orthodoxy. That orientation is especially problematic in Africa, where institutional research capacity remains limited and where education research as consulting has become commonplace. Needed is support for the sustained development of a competent, independent, and innovative research community. The World Bank finds it difficult to pursue that agenda, since doing so could well undermine its inclination to rely on its own research and challenges both its claim that it provides high quality development advisory services and its role in managing the integration of poor countries into the global political economy.

Three specific aspects are addressed in the chapters that follow: gender, human rights, and the growing attention to collaboration between the school system and other social actors. Nelly P. Stromquist centers her analysis on the gender component of *WBES 2020*. The new education strategy recognizes structural barriers to education and identifies gender as one of several forms of discrimination. Yet it fails to situate gender in a deeper theoretical framework that would enable its consideration as a core social phenomenon with multiple simultaneous causes and consequences, one of which is its “normalization” in varying cultures. The World Bank declares a commitment to redress asymmetries through education, yet its proposals do not build on gender theory nor consider the potentially adverse consequences of World Bank policies on women. Consequently, the educational strategy proposed by the World Bank continues to focus almost exclusively on increased access by girls to formal education and does not acknowledge schools as gendered institutions through which the knowledge they convey and the experience they foster tends to reproduce gender rather than challenge it.

For their part, Salim Vally and Carol Anne Spreen critique *WBES 2020*'s lack of attention to education rights and specifically the faulty assumptions promoting the role of education in “development.” They argue that despite a rhetorical nod to human rights in the introduction of the sector strategy, evidence of supporting rights “to, in, and through” education are absent in *WBES2020*. Vally and Spreen examine the document's framing of “development” and show how the new sector strategy continues human capital prescriptions for the role of education that rest on the false assumption that a narrow investment in technological and skills development will lead to greater productivity and economic growth, which will in turn alleviate poverty. Vally and Spreen contrast the World Bank's human capital

approach with a rights-based perspective that builds on Katarina Tomasevski's "Four As" framework for the Right to Education as well as on Amartya Sen's "capabilities" discourse and practice.

Susan Robertson focuses her critique on the World Bank's key strategy of involving the private sector in education—public-private partnerships (PPPs). Robertson holds that given widespread resistance to privatization from several sectors in the developing world, PPPs are being used to reintroduce it under another name. Her analysis probes into the World Bank's claim that the private sector is more efficient than the public sector and finds that *WBES 2020* offers little evidence to support it. What Robertson finds instead is the relentless defense of the neoliberal political ideology as an economic perspective and project, despite strong evidence about its shortcomings.

### RESHAPING THE FUTURE

Education policies can be useful instruments to guide decisions concerning the improvement and transformation of educational systems. Such instruments require great sensitivity to national contexts and objectives determined by their own citizens. It is possible to think of a global institution that could coordinate the design of suitable educational policies, but the World Bank has not demonstrated that it is the most appropriate institution for this task.

The chapter by Anne Hickling-Hudson and Steve Klees posits a Global Fund for Education as an alternative to the World Bank. They argue that the World Bank's narrow, neoliberal, ideological framework greatly restricts the choice of alternative educational policies. Building on issues raised in previous chapters and exploring others, Hickling-Hudson and Klees consider theories and evidence that support such alternatives, including: implementing the right to education; relying on different models of the connection between education and development; changing the stratified and unequal nature of schooling; eliminating the consumerist paradigm underlying education and emphasizing ecological sanity; making curriculum interdisciplinary and assessment authentic; recognizing that attention to quality means attention to equity; focusing on public schooling, not private; and realizing that "evidence-based policy" is a call for participation and debate, not a technical search for truth.

We conclude the book by integrating some of the key arguments in the various chapters into several concrete themes. There has long been widespread dissatisfaction with the role played by the World Bank in education. Our intent here is to provide a well-argued and well-researched concrete challenge to the World Bank's influential role in education policy.



**PART I**  
**FRAMING THE ISSUES**



GITA STEINER-KHAMSI

## FOR ALL BY ALL?

### *The World Bank's Global Framework for Education*

The 2020 World Bank Education Sector Strategy *Learning for All (WBES 2020, hereafter)* was presented in its final form to the public in February 2011 (World Bank, 2011a). The enthusiasm of Elizabeth King, chief architect of *WBES 2020*, perhaps best captures the great expectations associated with the launch of the new strategy:

*Let's Make It Learning for All, Not Just Schooling for All.*

... Having spent nearly 18 months traveling the world to consult with our partners (government, civil society, NGOs, development agencies) about the best experience and evidence of what works in education and about the role of the Bank Group in the next decade, I feel somewhat like I've given birth, in this case to a global framework for education which we believe is the right one for the coming decade. (King, 2011)

Regardless of the debate on whether *WBES 2020* truly sets new accents or merely reaffirms the World Bank's technical approach to educational development,<sup>1</sup> the insistence on fundamental change begs for explanation. Why is it so important to the World Bank to emphasize the novelty of the approach? Strategy development is steeped in a political process in that it helps to garner support from within as well as from outside an organization to channel resources into particular activities. Applied to *WBES 2020*, the question becomes: which adversaries does it attempt to convince and which new coalitions does it intend to form? According to the World Bank, *WBES 2020* heralds a novel approach that is supported by major actors in development: donors ("development partners"), recipient governments ("clients"), and broadly defined civil societies (businesses, non-governmental organizations, people). The comprehensive stakeholder review of this latest educational strategy seems to suggest that it has been endorsed by diverse groups of stakeholders, inside and outside the World Bank, and by implication is no longer a World Bank strategy but rather should be treated as everyone's strategy. Furthermore, the ambitious claim of having "given birth" to "a global framework for education" positions the document as a strategy with global reach and with universal

solutions. In this analysis, I attempt to study the grand claim of universality reflected in the World Bank's insistence that *WBES 2020* is not only a global framework for All but, as this chapter will show, also one that has been developed by All.

Since the focus of this chapter is not so much on the content of *WBES 2020*, but rather on agency and process, the following research question arises: How and when did the transformation from a World Bank framework for education to a "global framework for education" occur? I will address this question in this chapter from a perspective that is informed by systems theory (see Luhmann, 1990; Schriewer, 1990). The World Bank is analyzed here as a *social system* with its own regulatory regime that draws its legitimacy from a clearly defined mandate, a strategy, a set of actors, and a set of beneficiaries. This particular research question reflects an interest in understanding the social system rather than criticizing individual authors that work for the World Bank.

Many concepts introduced in this chapter are informed by system theory. For example, donor logic, self-referentiality of knowledge, and functional integration of aid systems—presented in the following sections—are used to explain the ever expanding scope of conditions that the World Bank established over the years for determining the eligibility for loans or grants. For the longest time, recipient governments had to subscribe to a structural adjustment policy (reducing public expenditures and increasing revenue from private sources). Heavily criticized by many in development work, the economic straightjacket of structural adjustment was preserved but in the 1990s supplemented with a social dimension (poverty alleviation) and later on, at the turn of the new millennium, with a political requirement (good governance). Over the past decade the World Bank re-invented itself in the education sector and presented itself as a knowledge producer and knowledge manager. In this particular role as knowledge bank the World Bank now determines what works and what does not work in terms of educational development. The knowledge-based regulation of the World Bank has, in effect, generated a fourth conditionality for recipient governments: programmatic conditionality. In addition to the economic, social and political conditionalities (structural adjustment, poverty alleviation, good governance), they now have to subscribe to a particular reform package ("best practices") that was first piloted in a few countries, analyzed in impact evaluations, and then disseminated to other recipient governments.

#### ON DONOR LOGIC

There has been a proliferation of studies that analyze "donor logic," investigating who has given aid to whom (and why, and how), or trying to understand more broadly the idiosyncrasies of the various aid agencies in education. Such studies demonstrate that, for example, the World Bank's rationale for lending money or giving grants is distinct from a foreign policy framework, as pursued by bilateral aid, and is also fundamentally different from the donor logic of UN agencies, philanthropies, non-governmental organizations, or, more recently, of celebrities

(see Alesina & Dollar, 2000; Richey & Ponte, 2008; Silova & Steiner-Khamsi, 2008). Phillip Jones' historical accounts of multilateral aid organizations greatly advanced this line of research (Jones, 1998, 2004, 2005). He scrutinizes the donor logic of multilaterals, including the World Bank, and finds great differences, depending upon how they are funded. He points out that UNICEF relies on voluntary donations from governments, private foundations, and individuals, and therefore "its analyses of need tend to be dramatic, its projections tend to be alarmist and its solutions tend to be populist" (Jones, 1998, p. 151). In contrast, UNESCO runs on membership fees that are, unfortunately, more successfully extracted from low-income governments than they are from high-income governments. Given the global scope of UNESCO's operation, supported by minimal funding, UNESCO relies on building alliances with resourceful development agencies.<sup>ii</sup>

I concur with Jones' observation that the World Bank has reinvented itself at the turn of the millennium and now functions as a knowledge bank. The concept of an international knowledge bank was first discussed at the Board of Governors of the World Bank in March 1996 (see Jones, 2004 and 2005). One of the options discussed was whether the financial lending operations should be delegated to the regional development banks (Asian Development Bank, African Development Bank, etc.) while the Bank itself focused on the lending of ideas. Three years later, in 1999, the World Bank's Global Development Network (GDN) was launched at a conference in Bonn where South-South cooperation, in particular, the dissemination of "best practices" within the global South was discussed (see Stone, 2000). As a result, policy transfer would ideally occur within and among the countries that are perceived as being similar, replacing the practice of transplanting reform packages from the First to the Third World.

Although the World Bank has not decreased its role as a lender of money, it has acted increasingly, over the past decade, as a global policy advisor for national governments.<sup>iii</sup> Needless to state, the World Bank's use of baseline analysis, target setting, and benchmarking as policy tools to coerce national governments into adopting a particular reform package, designed and funded by the World Bank, has come under serious attack. It has been rightfully pointed out by many, including several authors in this book, that the World Bank has elevated itself into the role of the "super think tank" among the aid agencies that, based on its extensive analytical work, knows what is good for the recipient countries but also what other aid agencies should support. Its self-described role as a knowledge bank, combined with the expensive impact evaluations which, in some countries, cost more than the actual "intervention" whose effectiveness they are supposed to measure, epitomizes the "what works approach." Worse yet, by implication the super think tank also functions as a judge on what does not work and consequently does not receive external financial support even if national governments prove the contrary and request funding for reforms that they deem important for their country.<sup>iv</sup> For many, the World Bank has remained arrogant and big-footed, this time around not only because of the volume of money it holds but also because of the masses of data it collects as well as the multitude of technical reports it produces. Having

reviewed the World Bank's analytical work on teachers, I make the argument in this chapter that the international databases of the World Bank are often agenda-driven and therefore vulnerable to methodological bias and coercive recommendations.

#### THE FUNCTIONAL INTEGRATION OF THREE AND MORE AID SYSTEMS

From a systems perspective, it is striking that the boundaries between the World Bank and other major development actors, in particular the United States and the United Kingdom, have become blurred. The strategies of the World Bank, DFID, and USAID have converged towards the same knowledge-based approach for delivering aid and chosen the same narrow focus on measurable student outcomes, notably on literacy and numeracy. Regardless of aid agency, there is nowadays an obsession with identifying progress indicators, a preoccupation with measuring results (including student results), and an institutional pressure to demonstrate the impact of an aid intervention. This is not surprising given the indicators of effective aid that the 2005 Paris Declaration on Aid Effectiveness established. In addition, the education sector strategies of the two largest donors<sup>v</sup> are remarkably similar to the World Bank's *Education Sector Strategy 2020* (World Bank, 2011a). In fact, *WBES 2020* adopted a title that was already in use in U.K. bilateral aid: *Learning for All: DFID's Education Strategy 2010-2015* (DFID, 2009). For DFID, but also for the World Bank and for USAID, skills development for youth is one of the strategic priorities (along with access and quality). The bilateral aid plan of the United States, released a few months before *WBES 2020*, also highlights student learning and skills development, and is entitled *USAID Education Strategy: Improving Lives through Learning* (USAID, 2011).

Even though the World Bank has a tendency to see itself as the representative of all bilateral donors,<sup>vi</sup> there are many bilateral aid agencies that share neither its focus nor its technical approach to aid. The Government of Denmark, for example, represents the largest donor in terms of per-capita spending on aid. Its aid agency (Danish International Development Agency, DANIDA) follows to the letter the 2005 Paris Declaration on Aid Effectiveness, and implements, among other features, results-based aid (DANIDA, 2010). At the same time, it pursues a human rights approach to education that does not reduce the value of education to literacy and numeracy. In the same vein, the Children and Youth Strategy of the Canadian International Development Agency (CIDA) is more holistic than *WBES 2020* and concentrates on three areas: child survival, access to quality education, and safe and secure futures for children and youth (CIDA, 2011). Similarly, Japan's Education Cooperation Policy 2011-2015 has also moved beyond narrowly defined strategic goals that coerce recipient governments into adopting donor-driven reform priorities (Ministry of Foreign Affairs of Japan, 2010). In stark contrast to the aid strategies of Denmark, Canada, and Japan—which are sufficiently broadly defined to allow for national governments to set their own agendas—the recipients of a grant or loan from the World Bank have to adopt the narrowly defined (global) framework of education that is advanced by the World Bank but also to some

extent by DFID and USAID. The recipient governments have to subscribe, at least rhetorically and at the stage when international funding is secured,<sup>vii</sup> to the donor's focus on measurable student-outcomes, testing, impact evaluation, and a host of other priorities that match the aid strategy of the donor but not necessarily the need of their country.

There used to be distinct differences between the various aid agencies, including between the World Bank, DFID, and USAID. In fact, they thrived from being different. They were, in terms of systems theory, “environment” to each other and thereby defined themselves in terms of how they differed from one another. We have witnessed over the past few years, however, a functional integration of the various actors. These three large donors, but also others, now inhabit the same system, that is, subscribe to the same international agreements (e.g., EFA, MDG) and adhere to the same standards of aid effectiveness (e.g., Paris Declaration 2005) that regulate the aid relationship between donors and recipients.

The argument is made here that *WBES 2020* attempts to cement a new aid environment, one in which World Bank tries hard to dissolve its boundaries with other development agencies—such as bilateral aid, multilateral agencies, non-governmental organizations—in order to assume global leadership on matters of aid. Thus, the standardization of aid that we are currently witnessing is very strongly dictated by standards propelled by the World Bank and with knowledge-based regulation tools used by commercial banks and businesses: ratings/rankings, performance assessments, targets, benchmarks, and progress reporting.

There are three aspects of the new strategy that deserve closer investigation: first, the broad stakeholder review process; second, the emphasis on “what works” and, finally, the circularity or self-referentiality in its knowledge production.

#### THE WORLD BANK: A HARMONIZER?

Stakeholder review is not out of the ordinary in democratic settings. This is not to say that the opinions voiced by stakeholders are considered and ultimately find entry in the published version of the strategy. In the case of the USAID education strategy, the stakeholders reviewed in fact the “wrong draft,” that is, the version that they reviewed was not the one that got published. A first version of the USAID Education Strategy was carefully researched by experts brought in from outside the USAID system and the draft was circulated for feedback among internal and external stakeholders over a period of several months in 2009. At the end, the version reviewed and revised by the stakeholders was shelved. A new USAID strategy document was commissioned from scratch, completed within a short period of time, and approved within an even shorter time. The valid version was not stakeholder-reviewed.

Different from USAID, the World Bank stakeholder review process was orchestrated publicly and documents related to the strategy and to the strategy development process were posted on the web. The Consultation Plan included feedback on the overall approach and the concept note as well as on the draft strategy. The consultations were scheduled over the period February to November

2010 (see World Bank, 2010). The concept note was translated into Arabic, Chinese, French, Russian, Portuguese, and Spanish and feedback on the strategy material was solicited from a broad array of experts based in governments, non-governmental organizations, think tanks, and universities. The *WBES 2020* team visited over two dozen cities across the globe to solicit feedback and also presented the draft at the 2010 annual meeting of the professional association of researchers and practitioners in educational development, the Comparative and International Education Society (CIES).

The content of the *WBES 2020* is as important as the process of (1) developing, (2) reviewing, (3) approving, and (4) presenting the new strategy. The following summarizes the four phases of strategy development for *WBES 2020*.

### *Development of the Strategy*

It has become customary to have experts produce background papers on lessons learned, trends observed, and issues arising in educational development. These background papers provide the “scientific rationality” (see Luhmann, 1990, and Schriewer, 1990) for the priorities proposed in the strategy. They later on serve as quasi-scientific stamp of certification when political disagreements surface. As with the Global Monitoring Reports of UNESCO but also with (the first version of) the USAID Education Strategy, the World Bank had background papers produced that synthesized evaluations and other empirical studies on aid interventions and educational reforms. An important detail here is that all the papers were produced internally reinforcing the point that I will be making later about the self-referentiality of the World Bank’s analytical work.<sup>viii</sup>

### *Review of the Strategy*

The review of the strategy was, as mentioned above, staged as a public enterprise; internal *and* external feedback was solicited. It was important to the *WBES 2020* team to point out that all products of the strategy development process—the technical approach, the concept note, and the draft strategy—were reviewed by a broad array of stakeholders including, for example, by students and parents who typically have little to say on matters related to formal education. The participation of the broad range of stakeholders in education is acknowledged in the preliminary pages of *WBES 2020*:

The strategy team is grateful to the government officials of partner countries, global development partners, representatives of civil society organizations, students, teachers, parents, and business leaders who made valuable recommendations throughout the strategy development and drafting process. (2011a, p. vii)

The list of those that “deserve special mention” is actually shorter than one would expect, given the extensive stakeholder review. It must be assumed that some consultations were deemed politically more important than others—e.g., “a consultation dinner for representatives from Angola, Ethiopia, Kyrgyz Republic, Mozambique, Tajikistan, Vietnam and Zambia” hosted by the Government of

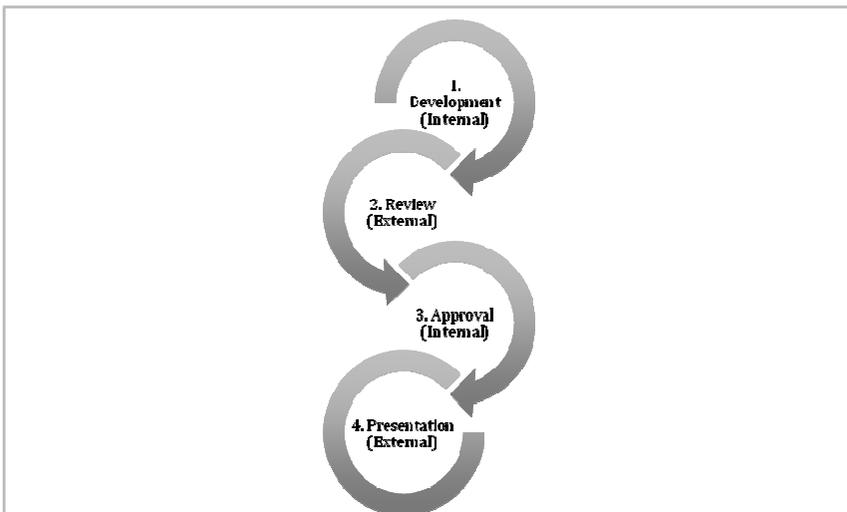
Russia (World Bank, 2011a, p. viii)—and therefore were listed in the acknowledgment section of the 97-page strategy document.

### *Approval of the Strategy*

It is customary that authors of strategies and other texts acknowledge the feedback received from reviewers and mention that some of the proposed changes have been incorporated into the final revision. This is not the case in *WBES 2020*, probably because indeed there is little similarity between the draft strategy presented for review, the feedback given, and the final strategy that was approved. The stakeholder review process (phase 2) was sufficiently broad to enable the *WBES 2020* team to selectively adopt the feedback that best matched the World Bank's idiosyncratic priorities and aid agenda. Contrary to the publicly open review process (phase 2), the approval process (phase 3) occurred behind closed doors. As with the first phase (development of the strategy), the third phase (approval of strategy) is for individuals outside the system a black box because it was carried out internally.

### *Presentation of the Final Version of the Strategy*

Outsiders were again involved in the final stage of the strategy. The document was translated into many languages, publicly launched, and widely disseminated.



*Figure 1. The Four Phases of WBES 2020 Production*

As Figure 1 illustrates, the development (phase 1) and the approval of the strategy (phase 3) were carried out internally, that is, within the World Bank

system. However, by emphasizing the inclusive approach and inviting outsiders to comment, that is, by visibly opening up the review (phase 2) of a product that was exclusively developed by World Bank staff and affiliates, the final version of the strategy (phase 4) was presented as *everyone's* strategy. The systemic shifts, internal-external-internal-external, illustrated in Figure 1 and explained in the previous paragraphs, enabled the World Bank to present its own education strategy as a product that was developed and endorsed by experts in *and* outside the World Bank system.

In policy studies, the process of consolidating various interests and agendas is called harmonization. What I have described with the four phases of *WBES 2020* is a process of *rhetorical harmonization* that enabled the World Bank to pretend that it has integrated divergent interests and agendas to the extent that their own education strategy now passes as everyone's "global framework of education."

#### "WHAT WORKS": IMPACT EVALUATIONS AND PROGRAMMATIC CONDITIONALITY

It is a bad idea to have the same institution review the education sector, identify a reform package, lend the money for implementing the reform package, and evaluate its effectiveness. In the same vein, it is ill conceived to have the World Bank analyze the problem and lend money for its solution. More often than not, the solutions exist before the analysis is carried out, turning the sequence of policy formulation on its head (see Steiner-Khamsi, 2010). Rather than first defining the problem and then searching for solutions, the reality on the ground differs: the formulation of the (local) problem is aligned with the already existing externally funded (global) solution. To be fair: the same applies to other aid agencies. They tend to invent problems and create a crisis in areas for which they have solutions to offer. Similar to other aid agencies, the World Bank pursues a limited number of educational reforms that it tests in a few countries and then disseminates—with a few adaptations here and there to reduce transfer cost—across the globe, regardless of country context. It would be more accurate to consider this particular reform package a portfolio of eligible reforms for World Bank funding rather than to use a label that carries a positive connotation: transfer of "best practices." I therefore suggest that the concept "transfer of best practices" be replaced with a term that captures the economics of policy borrowing as well as the power asymmetry between recipient and donor more poignantly: "programmatic conditionality."

The point I make in this section is that impact evaluation, for the World Bank and many other aid agencies the preferred mode for justifying their aid portfolio, has become a means for imposing programmatic conditionality on recipient governments. At closer examination, programmatic conditionality is, in effect, similar to the earlier, highly unpopular structural adjustment reforms that the World Bank and IMF imposed on recipients of grants and loans. Many of the pilot projects that nowadays make it into the World Bank portfolio of fundable projects aim at reducing public expenditures in education (by means of privatization,

rationalization, etc.), increasing revenue for the national education budget (from tuition, fees, etc.), and by reducing inefficiencies and wastage.

If it were not for the high cost associated with impact evaluations, one could simply criticize the World Bank for encouraging economists with doctoral degrees to carry out educational research. In teacher policy research, for example, the World Bank is enamored with impact evaluations that show that underpaid contract teachers produce better student outcomes than regular teachers who are not accountable, do not fear losing their jobs, and therefore either do not show up regularly in school, or if they show up, do not teach, or if they teach, do not teach effectively (see Bruns et al., 2011; Duflo et al., 2010). This complex causal chain of explanations is often simplified and reduced in the end to two variables only: low payment of teachers and job insecurity—both, according to the economists cited in World Bank publications, considered highly desirable for education systems that attempt to improve teacher effectiveness. Whether the contract teachers were members of the same community, perhaps spoke the same language as the students they instruct, or were more highly motivated because they were early-career teachers in a system that is, for a variety of reasons, demotivating for teachers, are all issues that educational researchers have examined in great detail. Alternative explanations are simply “noise” for a research agenda that attempts to scientifically prove that cutting public expenditures is not only necessary from a financial perspective but also, as impact evaluations supposedly demonstrate with “hard fact,” better for student learning.

Impact evaluations should also be criticized for being far too expensive for what they are able to offer in terms of explanations. A good case in point is the impact evaluation of the READ (Rural Education And Development) project in rural Mongolia, funded by the World Bank. READ provided children’s books to classrooms (40 books per grade level) in rural primary schools. The impact evaluation sought to assess two questions: first, do books make a difference for improving literacy skills of students and, second, does the preparation of teachers for integrating children books into their teaching matter? As with all quasi-experimental designs, the impact evaluation worked with large, representative samples. The design of the impact evaluation study is presented in Table 1.

The same standardized student achievement test was administered to primary school students and used as a tool to assess the effectiveness of the two interventions: (1) books only and (2) books with training. Even though the design of the study was methodologically solid, the research questions were for policy experts and practitioners banal. For the project staff in Mongolia, a formative project evaluation with recommendations on how to improve the implementation of the project was of much greater utility than the comprehensive impact evaluation with its quasi-experimental design. Furthermore, the research questions pursued in the impact evaluation were irrelevant for decision-makers in the Mongolian education sector. They had no doubt whatsoever that both children’s books and teacher training are much needed and they found it unethical to withhold books and training from rural schools in fifteen provinces (control group) only to

*Table 1. Design of the Impact Evaluation of the READ Project in Mongolia*

“Semi-Treatment” Group: Two Provinces	All primary classrooms in rural schools (in two provinces) receive 40 children books per grade
“Full-Treatment” Group: Three 3 Provinces	All primary classrooms in rural schools (in three provinces) receive 40 children books PLUS all teachers in these schools receive training on how to integrate children books into their teaching
“No Treatment Group” [Control Group]: 15 Provinces	None of the primary classrooms in rural schools (in 15 provinces) receive children books and none of the teachers receive a training

see whether the two interventions really have had an impact on students’ literacy skills. Finally, the decision-makers resented at the time that such a great amount of money was spent on the impact evaluation, and in particular on international consultants conducting the study, rather than on distributing books and training to more schools and provinces in Mongolia.

There was no doubt in anyone’s mind that the READ project filled an important gap in rural schools: provision of books and training. There was a great sense of gratitude towards this World Bank grant that enabled a revitalization of schools in rural Mongolia. But whom did the impact evaluation serve? As mentioned above, it was not meant to serve Mongolian decision-makers, but rather it was commissioned for the funder itself, more precisely for the knowledge bank of the World Bank. The World Bank evaluates its own projects and selects a few projects as “best practices” which it subsequently disseminates to other countries in the world. As mentioned above, what some scholars call the “scientific method” in educational research (quasi-experimental design) or “evidence-based policy planning” serves international organizations to package existing projects, brand them as “best practices” or a “global framework of education,” and transfer them—as part of the programmatic conditionality of a loan or grant—to developing countries.

#### WORLD BANK KNOWLEDGE: A SELF-REFERENTIAL SYSTEM

Over the past few years, I observed a growing interest of the donor community in issues related to teacher salaries, management, and deployment. Each of the funders is interested for different reasons in the topic, interprets the findings differently, and draws different conclusions from one and the same study. The World Bank, for example, is interested in this research area because 80 or 90 percent of national education budgets are allocated for salaries. UNICEF, in turn, is concerned with how to supply qualified teachers to schools that are marginalized in

terms of location or in other regards and has, against this backdrop, launched the Teachers for the Marginalized Initiative.

In the same vein, each agency uses the findings from the various studies differently. A few comments on the idiosyncrasies of agency-funded educational policy research in developing countries might be in order here. The following presents examples of World Bank-funded policy research in the area of teacher salaries, management, and deployment in which I participated as researcher: one in Tajikistan (see Steiner-Khamsi, 2007) and another one in Mongolia (World Bank, 2006). There is a disjuncture between the type of teacher reform studies that the World Bank funds in-country and how it represents them in the headquarters. As I will demonstrate in the following, the analytical work in-country (exemplified by studies in Tajikistan and Mongolia) is less agenda-driven than its international database (exemplified by SABER-Teachers) in Washington.

The study in Tajikistan explored the structure and composition of the teacher salary which teachers and government officials found fragmented and non-transparent. Teachers in Tajikistan as well as in other post-Soviet countries are paid a very low base salary (based on a weekly teaching load or, in Russian, referred to as *stavka*) and a series of salary supplements for teaching additional hours, for grading student notebooks, for serving as homeroom teachers, for managing a resource room or laboratory, etc. International agency after international agency have provided in Tajikistan, but also in other countries of the region, wrong advice and coerced the government into ill-informed reform priorities because they failed to understand the huge difference in teacher salary and work conditions in countries with a weekly workload system (used in Europe and North America) as opposed to the weekly teaching load system (used in the post-Soviet region). However, the important study on the “*stavka* system” (teaching load system in post-Soviet countries) was poorly timed. It was completed at a time when the Government of Tajikistan had just passed a comprehensive teacher salary reform by consolidating several salary supplements into the base salary and thereby lifting the teacher salary. Understandably, the Government of Tajikistan was not prepared to publish yet another report that proposed a revision of the salary structure, a better utilization of teachers, greater weekly statutory teaching load, and a much higher base salary for teachers. The ambitious World Bank study on the *stavka* system was exclusively read by World Bank staff and government officials but remained unpublished and underutilized.<sup>ix</sup>

The opposite occurred with the World Bank-funded study in Mongolia. The Public Expenditure Tracking Survey in Mongolia (PETS Mongolia) included a large component on teacher salaries (World Bank, 2006). The timing for the study could not have been better: Mongolia experienced rapid economic growth, triggered by a booming mining industry, and the Government of Mongolia was therefore receptive to the recommendations of lifting the teacher salary, adapting a weekly workload system and thereby replacing the previous teaching load system, as well as making the salary structure more transparent and less vulnerable to deductions that were regularly and arbitrarily made by school principals.

In both countries with a socialist past, Tajikistan and Mongolia, accountability was not an issue, but the low payment and morale and the big shortage of teachers in rural areas represented major concerns. In fact, in both countries—but also in several other former socialist countries examined in the UNICEF CEECIS Study on Teachers (UNICEF CEECIS, 2011)—teachers are heavily controlled and their salaries or salary supplements are deducted if they do not show up in school, come late, do not grade the notebooks of students, damage school equipment, and are constantly humiliated in many different ways by school principals and education managers. PETS Mongolia addressed how teachers in Mongolia lacked support at all levels of the education system and also demonstrated the huge inequality of teacher salaries in rural and urban schools. PETS Mongolia, funded by the World Bank, was without exaggeration one of the most influential policy analyses in Mongolia that had a major positive impact on the country’s educational system. Many commentators in Mongolia attributed the 2007 teacher salary reform to the findings presented in the PETS Mongolia study. As the most recent UNICEF Mongolia Study on Teachers (UNICEF Mongolia, 2011) demonstrates, teacher salaries almost quadrupled, teacher shortage in rural schools disappeared, enrollment in pre-service teacher education doubled and, most importantly, teachers are nowadays able to make a living from their salary and do not have to rely on additional sources from teaching excessively, farming, selling products in the market or on the streets, or from privately tutoring students after class. Naturally, the economic boom in the country made the implementation of the proposed changes possible. Nevertheless, the World Bank-funded PETS Mongolia study laid a foundation to garner political support for a major salary increase that was long overdue in Mongolia.

There is a gap that yawns between World Bank-funded analytical work carried out in various countries and its global representation by World Bank Headquarters. Therefore, the flattering comments on the two World Bank-funded studies—the study on the *stavka* system in Tajikistan and PETS Mongolia—need to be put in perspective and compared with the global knowledge bank on teacher policies, SABER-Teachers, that the World Bank Headquarters is currently setting up. World Bank Headquarters seems to have the mandate of coming up with a global policy framework for all kinds of reform areas, including for teacher reforms. Such a mandate is in itself problematic. In the area of teacher reforms, SABER-Teachers (System Assessment and Benchmarking for Education Results) documents “teacher policies for public schools in developed and developing countries in order to inform policy choices and promote policy dialogue, globally” (World Bank, 2011b). SABER-Teachers pursues eight policy goals:

- Setting clear expectations for teachers
- Attracting the best into teaching
- Preparing teachers with useful training and experience
- Matching teachers’ skills with students’ needs
- Leading teachers with strong principals
- Monitoring teaching and learning
- Supporting teachers to improve instruction

– Motivating teachers to perform

As the eight policy goals listed above illustrate, the emphasis of SABER-Teachers is on teacher accountability. Both the language and the policy goals used in SABER-Teachers clearly depict a negative image of teachers. It is an image that does not do justice to many regions and countries in the world, including, for example, Eastern Europe, Caucasus, Central Asia, and Mongolia, where teachers are micro-managed, controlled, and sanctioned. The language and concepts reflected in the policy framework of SABER-Teachers should be read as an invitation to decision-makers to come up with reforms that police and sanction the masses of underperforming teachers and provide material incentives to a small group of teachers who perform well. Without any doubt, the programmatic conditionality of the World Bank in the area of teacher policies is teacher accountability. This particular policy orientation is presented in detail in the World Bank publication *Making Schools Work. New Evidence on Accountability Reforms* (see Bruns et al., 2011, chapter 4). Judging from the list of “best practices” presented in the publication, the portfolio of eligible projects for World Bank funding are contract tenure reforms, pay-for-performance reforms, and other types of accountability reforms that, if implemented globally, make a profession that already suffers from universal shortage and low prestige even less attractive.

What bothers in publications of the World Bank, such as in *Making Schools Work* (Bruns et al., 2011), is the ambiguous case selection. As explained above, PETS Mongolia was an influential study in Mongolia and had a major positive impact on educational development in Mongolia. Yet, PETS Mongolia and numerous other World Bank-funded studies that paint a positive picture of teachers and contradict the larger agenda of teacher accountability are not presented in World Bank publications. Given the geographical scope of World Bank operations, one needs to be alerted if only a few countries are presented. One must assume that all the excluded case studies apparently did not fit the World Bank canon of teacher accountability reforms. Public Expenditure Tracking Surveys, for example, were conducted in dozens of countries but it is always the same handful of countries that are mentioned in World Bank publications; typically countries where major leakages and massive teacher absenteeism occur.

Methodologically speaking, the sample selection in World Bank reporting is seriously flawed. The bias has to do with the broader agenda of establishing a scientific rationality for teacher accountability reforms. The agenda-driven analytical work of the World Bank may lead to wrong conclusions and inappropriate policy recommendations that match the available project portfolio of the World Bank rather than the situation analysis that was carried out in-country.

The tendency to blend out any evidence from cases that do not fit the larger agenda is also reflected in the constant switch between internal and external agencies during the *WBES 2020* production process. In terms of system theory, the World Bank is a good case in point to illustrate the workings of the World Bank’s knowledge bank as a self-referential system. It only absorbs knowledge that perpetuates its own system logic. At the expense of being perhaps too polemic but

for the sake of clarity, the point on self-referential systems may be summarized as follows: The *WBES 2020* as well as other World Bank publications reflect the tendency of the World Bank to talk with everyone, speak on behalf of many, and listen only to their own. The self-referentiality of knowledge production is also reflected in the SABER-Teachers project:

*Why did the World Bank embark on SABER-Teachers?*

When client countries ask World Bank front-line staff how top-performing countries tackle different issues related to teacher policies (e.g., teacher training, incentives or accountability), project leaders have to respond to such requests on a case-by-case basis—*either by using Bank publications and databases or taking the initiative* to find out more about policies in top-performing education systems. (World Bank, 2011b; italics inserted by author)

As the excerpt from the SABER-Teachers portal website indicates, the World Bank is its own frame of scientific reference, that is, “Bank publications and databases” are the only source of information worth considering. Academics rightfully wonder whether there would be any harm to pick up a book or read articles in refereed academic journals on issues related to teacher policy. Research on teachers is not a rare commodity and others already took the “initiative” to study the topic in great detail. It is striking that the only quasi-external source of authority for World Bank publications are databases or student achievement studies (TIMSS, PISA, PIRLS, etc.) published by OECD or IEA.

#### *WBES 2020: A FUNDRAISER FOR PILOT PROJECTS*

Many multilateral, bilateral, and non-governmental organizations concentrate their efforts on funding pilot projects and hope that their projects are eventually funded from sources other than their own. They expect that the recipient government, upon successful completion of the externally funded pilot will scale up the project with funding from the education budget or from other external financial sources.

UNICEF Kyrgyzstan commissioned a donor involvement analysis that yielded interesting results with regard to the preferred aid modality of donors (UNICEF Kyrgyzstan, 2008). The study found that, with the exception of textbook publishing and standards reform, not one single donor-funded project was carried out nationwide. All donor-funded projects, including the multi-million dollar loans and grants by the World Bank, Asian Development Bank, and USAID were designed as pilot projects, concentrated in a particular geographic region of the country and targeting a relatively small number of institutions or individuals.

In several other countries of Central Asia, the Caucasus, and Mongolia, the role of funding incubator projects or pilot projects with innovative practices is typically reserved for NGOs, UNICEF, and UNESCO, which, despite their influence on the government, have to operate with limited funds. It is typical of these organizations to pilot innovative practices in the expectation that the government or larger donors

carry on with institutionalizing or funding their incubator projects. In the Kyrgyz Republic, in contrast, the two development banks favor the same aid modality that typically smaller organizations with limited funding pursue. ADB, the World Bank, and later on, also the EFA Fast-Track Initiative merely funded pilot projects for a limited time period with little attention given to how their projects will be scaled up nationwide.<sup>x</sup> Small and large aid agencies alike are prey to the illusion that the government will eventually scale-up their pilot project and finance them from the national education budget. For example, the World Bank and the Open Society Institute in the Central Asia region both had the same unrealistic expectation with regard to the sustainability of their projects.

The cost factor, in particular for projects of large bilateral and multilateral donors is not to be underestimated. The pilot projects are, for a variety of reasons, too expensive to be replicated and scaled-up. There are also capacity costs associated with pilot projects that weaken the institutional capacity of an education sector. The management of these short-lived pilot projects, each funded by a different donor, absorbs the capacity and the time of government officials to administer their own educational system. Donor coordination alone is unlikely to solve the problem. Impact evaluations, in turn, are part of the problem rather than the solution in that they make the pilot projects exponentially more expensive than they already are.

What is almost entirely lacking in the discussion of results-based aid is a longitudinal analysis of externally funded reforms: what is left of these reforms five, ten, or fifteen years later? Given the preferred aid modality of the World Bank—funding one’s own idea of “good education” overseas and presenting it as a global framework of education—there are few lessons to be learned from the past because most externally funded projects are terminated shortly after the funding dries up. The inability of the World Bank to independently reflect on its work, however, curtails institutional learning at the Bank. Given the preferred aid modality of the World Bank as well as that of other donor agencies—funding their own “best practices” in the form of expensive and short-lived pilot projects—one wonders whether the policies which are compiled under the cover of *WBES 2020* represent anything more than expensive, and in the case of the World Bank well-studied, pilot projects that very few countries, if any, have scaled up nationwide.

As mentioned in the introduction, *WBES 2020* was released in early 2011. It is too early to fully understand the impact of the comprehensive stakeholder review on World Bank operations. I end this chapter with an invitation to examine the following provocative question in five years from now: Was *WBES 2020*, in the end, nothing more than a compilation of pilot projects for which the World Bank sought additional funding so that recipient governments had the means to scale them up nationwide? These additional funds for pilot projects—framed as “best practices”—were meant to be mobilized from within the World Bank but also from other donors. Would such an outlook on a possible scenario explain the attempt of the World Bank to present its pilot projects as everyone’s and nobody’s “global framework of education”?

## NOTES

- <sup>i</sup> The World Bank approach has been polarized by supporters and opponents to an extent that makes it difficult to nowadays summarize it without making any value judgments. Formulated positively, the World Bank stance on educational development may be summarized as an approach that focuses on results, measurement, and knowledge in an endeavor to increase effectiveness and at the same time reduce cost in the education sector. With the same forcefulness, however, the World Bank has been criticized for working behind a “façade of precision” (focus on results, measurement, knowledge) to ultimately carry out its broader economic agenda.
- <sup>ii</sup> Jones’ point on donor logic is well taken even if one may find his depiction of UNICEF as too harsh.
- <sup>iii</sup> OECD has a similar role for governments in developed countries. There is a need to analyze the close relation between OECD and the World Bank that has evolved over the past few years.
- <sup>iv</sup> A case in point is the long decade of neglect in rural education in Mongolia (1991-2003) that reduced the enrollment and increased the dropout of children (especially boys) from nomadic herder families. The Ministry of Education of Mongolia periodically requested external financial assistance for improving the infrastructure of schools in rural areas, many of which had boarding facilities for children from herder families. However, there simply were no international “best practices” or impact evaluations available to the Asian Development Bank (biggest donor in Mongolia) or the World Bank (mostly constrained to analytical work in Mongolia) to justify—vis-à-vis their own constituents in the banks—their involvement in rehabilitating the boarding school systems and the preservation of small multi-grade village schools that secured access for a population that, at the time, was not only nomadic but also widely dispersed (see Steiner-Khamisi & Stolpe, 2006).
- <sup>v</sup> The five largest bilateral donors in terms of volume are the United States, United Kingdom, France, Germany, and Japan (see Aid Statistics 2010 compiled by OECD DAC).
- <sup>vi</sup> Similarly, the EFA Fast Track Initiative was renamed in 2011 to Global Partnership for Education. The secretariat of EFA FTI remains based at the World Bank.
- <sup>vii</sup> Once funding has been secured, recipient governments sometimes undermine the project objectives either by disengaging from project implementation (and delegating implementation to an externally funded Program Implementation Unit) or by refusing to scale up externally funded projects—most of them pilot projects—with their own funds from the national education budget. Several studies have dealt with the economics of policy borrowing (see Steiner-Khamisi, 2010; Steiner-Khamisi & Stolpe, 2006) and analyzed the financial reasons for the “global speak” of recipient governments.
- <sup>viii</sup> The authors of the *WBES 2020* background papers are listed in the Acknowledgement section of *WBES 2020* (p. vi f.). Without any exception, the authors of these background papers are all World Bank staff.
- <sup>ix</sup> The analysis of the *stavka* system in Tajikistan, funded by the World Bank, was the first study that compared the features of the weekly teaching load system (Russian: *stavka*) with the weekly workload system. It did not have an immediate impact on educational reform in Tajikistan for the reasons mentioned above, but the categorization of teacher salary systems was subsequently used for the preparation of a GMR background paper (Steiner-Khamisi et al., 2008) as well as for ten different UNICEF studies on teachers in the CEECIS region, Eastern and Southern Africa region, and Mongolia (see, in particular, UNICEF CEECIS, 2011, and UNICEF Mongolia, 2011).
- <sup>x</sup> The World Bank’s Rural School Project, for example, initially chose the two provinces Talas and Issyk-kul as two “pilot” provinces. Teaching methods, teacher training, teaching material, and other innovative practices that were piloted in these two pilot provinces were supposed to be disseminated to the other provinces of the country. The initial scaling-up plan for nationwide teacher training, for example, had already been dropped during the second year of the project because the pilot turned out to be more expensive and therefore non-replicable.

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## WORLD BANK POETRY

### *How the Education Strategy 2020 Imagines the World*

Baa baa black sheep; have you any wool?  
Yes sir, yes sir, three bags full;  
One for the master; one for the dame  
And one for the little boy; who lives down the lane.

This well-known nursery rhyme had a different ending line until the middle of the eighteenth century, when the more palatable “one for the little boy who lives down the lane” substituted “none for the little boy who cries in the lane.” The text in all probability refers to a royal tax of six shillings imposed on wool in 1275, representing one-third of the wool income that henceforth needed to be paid to “the master” (the king). The remaining two thirds would be claimed by “the dame,” the church or monasteries. Nothing remains for the shepherd, the little boy who cries in the lane. Hence, “rather than being a gentle song about sharing things out fairly, it’s a bitter reflection on how unfair things have always been for working folks throughout history” (Jack, 2008, p. 11). For four hundred years this text thus represented a critique of inequitable economic distribution practices, until it merged into mainstream child poetry. It is reflecting reality, but also shaping it in the form of creating a “discourse,” an understanding about reality. The poignancy of the earlier imaginary has been replaced, by changing only a few letters, into a sweet little rhyme depicting a just and uncomplicated world.

Why does it matter and to whom does it matter how the World Bank imagines the world? As in the nursery rhyme above, inattention to inequality and injustice in text may produce or reinforce inequality and injustice in the real world. In this way, certain texts—or dominant discourses—create reality. It is my belief that the World Bank’s texts represent such dominant discourse because they contribute to shape people’s lives. A few seemingly trivial words from the World Bank can convince politicians to adopt policies with far-reaching consequences.

Since the antiquity, people have tried to understand how discourse constructs the world. As shown by Aristotle, the “fields of logic, rhetoric, and dialectics are all about arguments” (Walton, 2007, p. 7), but each of these fields approaches

argumentation in a different way. Here, I try to demonstrate how discourse can impel people to adopt certain ideologies or courses of action that may not, in fact, represent the best way of proceeding. In this vein, fallacy theory can show that a notion that “seems to be good in a certain way ... isn’t in fact good in that way” (Woods, 2004, p. xx). This chapter seeks to demonstrate ways of constructing and planning a world that apparently seems to be good, but that may lead to other consequences than those intended. In particular, it seeks to reveal how the World Bank is imagining the world—and how it is at the same time creating the world in its image. The main research question of this chapter is to define how the *World Bank Education Strategy 2020* re-invents education and in which direction the strategy may influence national education policies.<sup>1</sup>

World Bank texts can be read as poetry—it is language that has evocative and suggestive qualities in addition to its apparent meaning. *Poetry* derivates from the Greek, meaning “a making” or “a creation”; hence, it is not neutral but creates reality. I seek to establish, through critical discourse analysis, how the World Bank strategy is creating a worldview. The analysis attempts to explore patterns within the strategy document—seeking to identify possible social consequences of how reality is being described. Using the allegory of “Baa, baa, black sheep,” the study questions whether the World Bank world is where the little boy or girl gets his or her dues, or whether he or she remains crying in the lane. In its role as the world’s largest external financier of education, the World Bank, with its strategy, becomes an international reference that will exert a great deal of pressure on individual countries and the development of their education systems in the years to come.

World Bank poetry is thus both text and a *discourse*, understood as constitutive of the social, encompassing not only language but also social phenomena (Laclau & Mouffe, 2001). Hence, the Education Strategy is not seen as an abstract document, but also as situated practice that is dynamic, flexible, and changing. The clash of various discursive practices may result in adaptation and transformation. World Bank poetry is often argumentative, in which the term “argument” is used as a “position that is reasoned out” (Wilson, 1986, p. 3). Other times, it is assertive, where claims are put forward without providing supporting reasons.

The text of the document (whether argumentative or assertive) is used to create a reality of the world—and of education—that is translated into implementation strategies; and into educational philosophies, aims and values. Norman Fairclough (2003) argues that discourse analysis focuses on interpretation of texts, on these texts’ relation with social practice, and on the way they are made and disseminated in the world: “I see discourse analysis as oscillating between a focus on specific texts and a focus on what I call the ‘order of discourse,’ the relatively durable social structuring of language which is itself an element of the relatively durable structuring and networking of social practices” (p. 3). Terry Locke, drawing on Fairclough, segregates text analysis into four different categories: vocabulary (analysis of individual words), grammar; cohesion (argumentation), and text structure (Locke, 2004). The next sections of this chapter are dealing with the strategy’s appearance and structure, as well as its vocabulary and cohesion

(including argumentation and assertions), since these categories arguably reveal parts of the ideology that is underpinning the strategy.

#### TEXT STRUCTURE

The structure and vocabulary of the World Bank's education strategy are tools of persuasion. This in itself is not surprising or off-putting in any way—"in almost every kind of situation—language seems to have persuasive effects, whether calculated and intentional or not" (Toolan, 2011, p. 15). As far as the strategy goes, the persuasion is intentional; the World Bank would of course like us to adhere to its views. Hence, the title and internal architecture of the strategy are of interest, inasmuch as they are windows into the document.

As for the title, the reference to the year 2020 (and not a range of years such as 2011-2020; or the MDG target date of 2015) gives a first impression of a vision that is reaching beyond the immediate future; it is felt like science fiction, with resonance to titles such as *2020 Vision* by Poul Anderson et al. (1980), or even to Arthur C. Clarke's various *Odyssey* books (*2001, 2010, 2061...*). The cover picture of the strategy document emphasizes this feeling: it is depicting the world shown from afar, with various symbols (mathematical, monetary, musical...) covering the continents—almost like carpets of magic. The continents themselves are seemingly reinvented, and the perspective is quasi-eliminating certain countries and drawing the viewers' regard towards Africa.

The subtitle of the strategy creates a sense of inclusion, and at the same time of great abstraction: *Learning for All: Investing in People's Knowledge and Skills to Promote Development*. The strategy concerns us all; the World Bank, presumably, is willing to invest in people to promote development. Little boys and girls are not left crying in the lane, neither are illiterate moms and dads. The vagueness of the vocabulary should be noted: what does the sentence "investing in people's knowledge and skills" mean? Who are these people? Which knowledge and skills? The subsequent text clarifies that "people" are "not just the most privileged or gifted," but also "girls, people with disabilities, and ethnolinguistic minorities" (pp. 4-5). The juxtaposition of these three "problem" categories and their opposition to the "privileged" and "gifted" are in itself interesting. As for the references to "Knowledge and Skills," the strategy indicates, "recent research shows that the level of skills in a workforce—as measured by ... PISA and TIMSS—predicts economic growth rates far better than do average schooling levels" (p. 25). The focus therefore goes beyond school retention and is related to the actual learning taking place at school and elsewhere. The references to skills are also pointing to the need of better "linkages between education systems and labor markets" (p. 44). The type of development referred to, here and elsewhere, is largely economic.

It should be underlined that terms commonly related to education, such as schools, teachers, or curriculum, are curiously absent from the title. It is as if the World Bank is creating knowledge and skills in a vacuum, through "investment." Later, this omission of references to schools and teachers is explained. The World Bank is operating with an "expanded" definition of education, which "includes the

full range of learning opportunities available in a country, whether they are provided or financed by the public or private sector (including religious, nonprofit, and for-profit organizations)” (p. 5). The definition makes it clear that the World Bank seeks to continue previous practices of operating outside state-run school systems, drawing on a range of private entities for the implementation of various educational activities: “This more inclusive concept of the education system allows the Bank Group and its partner countries to seize opportunities and address barriers that lie outside the bounds of the system as it is traditionally defined” (p. 5). The first elements of the World Bank’s views, then, are already present in the title, albeit in a hidden way—and are subsequently unpacked in the strategy’s executive summary and in the main text: the strategy promotes skills that fit the labor markets, and the private sector should be a main implementation partner of the “service” of education.

The body of the document, laid out in the “Contents” list, is divided into four parts: first, the rationale for the strategy is given in the first section; then the second lays out the strategy; the third backs it up by providing an overview of the World Bank’s “lessons” in education; and the fourth section is providing the implementation arrangements. This logic composition is centered on the strategy. The structure, thus, is another example of persuasive argumentation: the World Bank is repeatedly trying to convince the reader that its policies are well founded. Detailed examples of this can be seen in the “lessons” section. For example, regarding the topic of economics of education, the World Bank indicates that it “has published more journal articles than 14 top universities—only Harvard University comes close” (p. 53). Hence, it is presenting itself as a direct competitor to the best universities; it is a “knowledge bank;” “a generator of new knowledge and a synthesizer of existing knowledge” (p. 53). This is a version of an *argumentum ad populum* in which the World Bank “appeal[s] to popular opinions and feelings to accept a conclusion or a course of action” (Walton, 2004, p. 15). This can be seen as a fallacy of irrelevance: the argument implies that the World Bank’s publishing record is guaranteeing the soundness of its policies. The external debates, for example of public vs. private provision of education, and a clear positioning of the World Bank’s stance in this debate, are omitted.

Other persuasive strategies, including evocative and sentimental ones, are employed from the very beginning of the document, when the World Bank is referring to human rights and the current state of the world (unemployment and global economic downturn) to justify its policies. The “disappointing” results of former schooling are related to lack of quality, making youth leave school and enter the workforce “without the knowledge, skills, or competencies necessary to adapt to a competitive and increasingly globalized economy” (p. 17). The needs of this global economy is one main rationale for the new education strategy, the others being rapid urbanization, the existence of a “youth bulge,” and the emergence of new middle-income countries. A medical model of early childhood is presented to provide further evidence of the soundness and necessity of the strategy, and in particular, the need for early childhood education (see for example box 3 on pp. 27 and 28). It should be noted that the World Bank’s text mixes

educational arguments (e.g., early childhood education) and implementation arguments, such as the need for private provision of education. The relevance of this reasoning can be questioned.

All along the strategy document, marginal annotations are providing persuasive “snapshots” from the main text. Some are playing on the emotions of the reader, such as “Learning for All means ensuring that all students, not just the most privileged, acquire the knowledge and skills they need to live happy, productive lives” (p. 4). The reference to happiness is repeated in the strategy’s first sentence which also contains a certain intertextuality with Adam Smith’s *Wealth of Nations* (1904); we learn that “people are the real wealth of nations” and that education leads to “healthier, happier and more productive lives” (p. 11). Other annotations use rhetorical devices such as anaphora (repeating a word at the beginnings of each sentence, to add emphasis): “Invest early. Invest smartly. Invest for all” (p. 9). The casual reader, when browsing through the document, will get a first sense of the content through the information in these annotations. For the thorough reader, the marginal annotations will recapitulate essential tenets of the text, using a simple vocabulary, thus helping to assimilate the message. The general cohesion and architecture of the text, then, aim at bringing the reader to an understanding of the World Bank’s position with regards to education, and persuade him or her to take up the same position. Presenting itself as a “learning bank” at par with universities such as Harvard, the World Bank’s education strategy seeks to convince the reader about its strategies—its vision of the future—for 2020 and beyond.

#### VOCABULARY AND COHESION

An analysis of the frequency of terms employed in the document further demonstrates how the World Bank is creating meaning.<sup>ii</sup> Not surprisingly, the top terms employed are related to key terminology of the sector, such as (in order of frequency) *education*, *World Bank*, *countries*, *development* and *strategy*. Then some terms emerge that are more surprising: *System* (with its inflexed variants *systems*, *systemic*) is used 320 times; *skill* is used 196 times (against 170 for *knowledge*), underlining the strategy’s emphasis on employment and skills development. Likewise, *income* (used 128 times) is found much more frequently than other indicators of impact of education, such as *health* (43 times), *nutrition* (14 times), *equality* (21 times), *agriculture* (14 times), *literacy* (8 times), and *empower* (6 times). This use of vocabulary reveals what is most important for the World Bank, which is also found in the title of the strategy: improved skills for economic development.

As for the quality of education provided, it is noteworthy that the term *assessment* is used 123 times, *quality* 111 times, *improve* 147 times, *performance* 96 times, *results* 91 times, and *accountable* 50 times. The term *corruption* is used only 5 times—at the same level as *decentralization*. In terms of implementation, the terms *economic* (exact word match) is used 94 times, *finance* 52 times, and *private* is used 81 times. The term *state* (exact word match<sup>iii</sup>), as opposed to *nonstate*, is found 4 times; *public* (exact word match) is found 26 times, and *government* (exact

word match—to avoid confusion with *governance*) is found 38 times. It is noteworthy that the term *private*, most often referring to private implementation and/or partnerships with private entities, is employed more frequently than the term *teacher*, which is used 66 times, or *curriculum/curricula* which is found only 9 times. For the World Bank, the quality of education is connected to improvements in assessment, governance and accountability—as well as the use of private provision for implementation of certain educational services. Teacher training and curriculum development, while underlined as important facets of the education strategy, are not given much space in the text. The strategy, however, does not dismiss these areas: it subordinates them to the system approach. Hence, education is presented as a technical management and governance issue, rather than a pedagogic process.

As for the education provided, the term *primary* is found 52 times, *secondary* 47 times, *tertiary* 37 times, *vocational* 17 times, *nonformal* 10 times, and *TVET* (technical and vocational education and training) 8 times (all these terms are exact word matches). As for the learners, the term *student* is employed (109 times), as well as *child/children* (91 times), *youth* (35 times), *girls* (38 times), *vulnerable* (4 times; exact word match), *disability* (11 times), *boys* (9 times), and *adolescent* (7 times). Likewise, for other stakeholders, the term *people* is used 100 times, *population/s* is used 49 times (exact word match), followed by *poor/er/est* (47 times), *community/ies* 30 (exact word match), *family* (20 times), and *parent* (15 times). *Marginalized* which appeared 5 times in the draft version of the strategy, only appears once in the final version: “improving education quality is a pro-poor objective, because quality is typically worse in the schools serving poorer and more marginalized communities” (p. 51). Again, the terminology is revealing: it is assumed that general improvements in education quality will trickle-down to schools in marginalized communities.

As evidenced by the vocabulary, the strategy emphasizes primary and secondary education, followed by tertiary. Nonformal education, including adult literacy training, which often is seen as key to skills development, is getting less space. There is an apparent contradiction, in that the title of the strategy insists so much on skills and employment for all people, including the poorest and most marginalized, whereas the strategy does not seem to reflect this in its vocabulary: for example, adult literacy training seems to be conspicuously absent from the strategy. A figure depicting the share of World Bank’s lending in education (p. 49) confirms this contradiction. In the period covering 2006-10, adult literacy received 0.7 percent of the World Bank’s educational funding; vocational training received 5.3 percent and pre-primary 3.3 percent. In the period from 1991-1995, literacy received 0.8 percent, vocational training 13.4 percent, and pre-primary 2.1 percent. The trend therefore seems to diminish the focus on literacy, non-formal adult education, and on vocational training. Nothing indicates that this new strategy will entail a fundamental shift in the World Bank’s budgeting priorities.

A closer look at the cohesion (argumentation) of the text strengthens and nuances earlier findings: using a technical and business language, the World Bank is proposing two core directions—reform of education at country level, and

building a “global knowledge base ... to guide [education] reforms” (p. 1). These reforms will focus on the inclusion of various private groups as providers of educational services, and at the same time increase accountability and effectiveness of the existing school system through school-based management, greater autonomy, and “effective assessment systems” (p. 33). Hence, even the references to education as a human right in the second sentence of the strategy document is used as a device to introduce the terminology of smart investment: “Access to education, which is a basic human right enshrined in the Universal Declaration of Human Rights and the United Nations Convention on the Rights of the Child *is also a strategic development investment* [my emphasis]” (p. 1). Again the combination of different types of arguments (human rights *and* strategic investment) is used as a device to convince the reader about the World Bank’s seriousness and to frame the analysis of education as a business investment from the beginning of the strategy. The angle of analysis, then, is not related to human rights, but to strategic development investments and, in particular, processes of implementation, or “service delivery.”

This system approach, with emphasis on reform and accountability is deemed to be relevant everywhere. The World Bank world is divided into fragile states, and low- and middle-income countries. Different approaches could be followed for different categories: “Client groupings based on economic and educational development, overlaid on geographical location, can lead to clearer, more strategic priorities and assistance [than the prior geographic focus]” (p. 56). However, looking closer at the three groups, their differentiation (in terms of strategies) becomes less clear: “Countries in all three groups share many common challenges ... that are best addressed through a set of cross-cutting priorities ... such as increasing the efficiency and effectiveness of resource use, improving transparency and accountability in education systems, and promoting investments in high-quality learning opportunities” (p. 55). These crosscutting themes are not further explained. The investment and system approach—and presumably also the focus on the private sector, therefore seem to be universal strategies for the World Bank. Adaptation based on economic and educational development, as well as geographical location, is related to communication methods rather than to different strategies: “differentiating countries by both level of economic development and institutional capacity helps organize knowledge exchange and policy debate, staff assignments and training, as well as the identification and design of programs” (p. 55). These methods are not further described.

At the global level, this effort will be matched by establishing “system tools” for “assessments and benchmarking” (p. 7). The tools will also, presumably, strengthen the World Bank’s own role as a “learning bank” and as a center of data and knowledge. A large part of the strategy is related to these system tools, much more than issues such as teacher education and curriculum development, which are hardly mentioned at all. The vocabulary and cohesion of the text thus mirror the text structure: the overall arguments are related to sound investments, private provision of a service, and system tools that, it is presumed, lead to better quality of education. These strategies are presented as a result of World Bank expertise

and as a natural evolution of past strategies. Alternatives and debates are therefore irrelevant.

### CRITIQUE

In critical discourse analysis, it is generally assumed that “facts can never be isolated from the domain of values or removed from some form of ideological inscription” (Locke, 2004, p. 25). Therefore, it is believed that the way the World Bank organizes data is in itself revealing of a certain ideology. A number of fundamental principles can be extrapolated from the World Bank strategy. As in the newer version of “Baa baa black sheep,” these principles are not stated; they are taken for granted—they are a part of a pre-analytic imagining of the world. They are thus essential parts of World Bank poetry:

The world is *just*.  
The world is on *the right track*.  
People are *good*.

These principles can be deduced from the strategy’s non-problematic description of the state of the world. It is assumed (not stated) that people make informed, rational choices, and that they are mostly honest and efficient, or at least, that efficiency can be controlled for.

The notion of education as a human right is not emphasized. As the Global Campaign For Education, a network bringing together major NGOs and Teachers Unions in over 120 countries, noted in their response to a draft version of the World Bank Strategy (January 17, 2011, p. 2), “the strategy lacks recognition of education as a human right, a public good and a responsibility to citizens that the state has assumed.” Likewise, the terms *justice* and *injustice* are not found in the strategy document. The World Bank strategy for education does not consider issues of wealth distribution, power relations, or the possible role of education as a tool to propagate disparities and to continue patterns of injustice.

The lack of references to human rights and justice does not mean that the World Bank ignores problems related to disparities and inequality. The draft version of the strategy was clearer in its disclosure of how it will address “disparities and disadvantages suffered by marginalized populations” (draft version, p. 56). These problems will be fixed by “going beyond the educational services delivered by the public sector,” using for example “civil society organizations” and also establishing a “multisectoral development approach” (draft version, p. 57). Lack of education and disparity will therefore be addressed by the use of non-governmental suppliers to reach the marginalized population, as well as the provision of additional health services and roads.

The strategy thereby seems to indicate that despite formerly insufficient provision of service, the world and the World Bank are now on the right track: lessons generated from former World Bank strategies show the way forward, and quality education and skills development, together with the provision of other

needed services, will further improve the world. Such “right track” includes various levels of partnerships with the private sector, which are characterized as “good” as long as there is some level of regulation. The Global Campaign for Education, in its aforementioned reply to the strategy, noted that, “the strategy focuses too heavily on private sector and market-based approaches to education, and on education as an instrument to serve the job market” (p. 2). The reason for bypassing the government and using the private sector (including civil society organizations) is based on an “argument from consequence” in which “an argument ... draws on casual reasoning [and] ... projects a consequence that will likely follow as a result of some action or policy” and in which “the crucial factors to consider are the likelihood that the consequences will be caused by what is proposed” (Tindale, 2007, p. 183). The problem, of course, is that the World Bank rarely analyzes the consequences of privatization (or of other policies), in part because their strategy is based on prior practices (the “learning bank”) as well as on “two phases of internal and external consultations [and] technical work on specialized themes carried out by staff across Bank units” (p. 17). The pre-analytic understanding of the World Bank is based on certain axioms (the need for constant and global economic growth, the primacy of the market, focus on processes rather than on pedagogy) and slight modifications from past strategies rather than the questioning of the *status quo* and the search for new directions.

Likewise, the strategy lacks engagement with pedagogical issues, such as teacher training and curriculum, or references to the hidden curriculum. Terms like rape or bullying are absent; and the possibilities of schools that are functioning as recruiting grounds for child soldiers or terrorists are not considered. Education is unproblematic and overwhelmingly positive, as long as its quality is measurable and assessed systematically. Teacher training and curriculum development are subordinated to system development, and referred to *en passant*; e.g., “The centerpiece of the learning strategy is learning for all. This goal is to be attained not only through more investments in inputs (e.g., more trained teachers or university professors, a better curriculum, more learning materials), but also *through greater attention to institutional changes in the education system* [my emphasis]” (p. 46). It continues:

The new strategy emphasizes the importance of aligning governance arrangements, financing, incentives, accountability mechanisms, and management tools with national educational goals. It explicitly recognizes that the term “educational institutions” applies not only to formal public schools and universities, but also to learning opportunities offered by organizations outside of the government sector and formal education institutions. (p. 46)

The strategy mainly focuses on these systemic changes, rarely mentioning problems such as low-quality teachers, teachers supplementing their income through private tutoring (and thereby exasperating inequality), lack of materials, or curricula without any relevance to the local needs. Hence, education is reduced to an investment in a service and a set of logistic issues:

The strategy presents education as a management and governance process, promoting an overly technical and narrow view of management which fails to emphasize participation by civil society, teachers, parents and other direct stakeholders in such processes. The strategy lacks detail on the pedagogic process that is education and assumes that governance reform will automatically translate into positive outcomes at the school level. (Global Campaign For Education, 2011, p. 2)

The strategy repeatedly finds that “private entities are providing education to even the poorest communities, especially in areas that governments do not reach” and that “governments typically have to provide appropriate regulation and oversight to ensure the quality and relevance of privately provided services, as well as access for disadvantaged students” (p. 35). The draft version noted “private entities are important providers of education services to even the poorest communities” as long as “governments recognize their importance and provide appropriate regulation and oversight of private providers to ensure the efficiency and coherence of their education services” (draft version, p. 20). Private tutoring (also known as “shadow education”; see Bray, 2007), a worldwide phenomenon that is currently skewing the education systems towards enhanced provision for the rich, is not seen as a problem but rather as a solution. As noted in a marginal annotation, “a system approach can broaden the potential agenda for action in education policy, enabling governments to take advantage of a greater number of service providers and delivery channels” (p. 34).

The strategy is noteworthy for what it omits as much as for what it states. Education, and more specifically, the learning of skills is the solution to a number of societal ills: “Youth who drop out of school early are vulnerable to unemployment, poverty, teen marriage, pregnancy, and delinquency” (p. 26). Unfortunately, recent events in North Africa have shown that youth who have attended tertiary schooling also are vulnerable to unemployment and extreme poverty, and in some cases to desperation leading to self-immolation or other, more violent forms of resistance. The strategy addresses the problem of lack of connection between education and work—yet does not seem capable of proposing more inventive solutions than “recognizing employers as key stakeholders” (p. 44).

The document, in a nutshell, represents a coherent strategy of privatization and system approaches, which, it is believed, will lead to better teacher training and improved curricula. The World Bank presents itself as an unquestionable authority on education, which brings the public and private sectors into equilibrium and harmony, as “providers” of educational “services.”

To sum up, the *World Education Strategy 2020* is a text that uses arguments and assertions inherent to World Bank ideology to convince its readers. It is a policy document, a World Bank vision for the future worldwide delivery of education. It in many ways remains poetry that is essentially positive and upbeat, imagining a happy world of 2020. In its way, it resembles the new version of “Baa baa black sheep,” because it is hiding unfairness and injustice in a vocabulary of public-private *partnerships* (used 40 times) and *cooperation* (used 6 times; exact word

match). These choices of words, constructs, and topics are not simply inconsequential preferences but rather a selection of priorities with significant direct and indirect consequences. The inattention to inequality and human rights in the strategy will produce or reinforce injustice in the real world through further privatization of education “services.” The text is a dominant discourse and creates and shapes the reality for people’s lives and for their relationship with local schools. And, although the poorest and the marginalized are included in the discourse as target groups (and as a focus of privatized education)—and healthcare, roads, and schools are planned for—one still must wonder whether, when the master and the dame have taken their dues, anything remains for the little boys and girls who stand crying in the lane.

## NOTES

- <sup>i</sup> Two versions of the Education Strategy have been considered for this chapter. NVivo word frequency analysis and quotations that refer to page numbers alone, concern the final version of the strategy, the PDF file dated April 12, 2011 and available on the World Bank’s web site. Quotations referring to *draft version*, draw on the version discussed at the Board of Directors on April 12, 2011, which has a useful Annex 2, “Frequently Asked Questions on the World Bank Group’s Education Strategy 2020.” This annex is not present in the final version of the strategy (although both documents refer to the same date of April 12, 2011).
- <sup>ii</sup> The analysis of word frequency has been done through queries run in NVivo 9 (information analysis software from QSR International), displaying the thousand most frequently used terms in the sector strategy. Two basic queries have been used here; the first (and most frequently used in this chapter) counts all inflected variants of the word, using NVivo 9’s stemmed word frequency function. In this mode, for example, the term *school* will be counted together with *schools* and *schooling*. Likewise, the term *assessment* will be counted together with *assess*, *assessed*, *assessing*, and *assessments*. In general, I found this to be the most logical way to proceed. In a few cases, indicated in the text as *exact word match*, I have used a query for the exact match of the term (see also note 3 below).
- <sup>iii</sup> To avoid confusion between the noun *state* and the verb *to state*, and/or the United States, it was necessary to run an exact word match analysis of this term, which still presented problems when it came up with 10 hits, many of which needed to be eliminated because of confusion between “the state of education,” “fragile state,” and what interested me, namely *state* (public) versus *private* implementation of educational services (which came up four times).

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