

THE WORLD BANK AND EDUCATION

COMPARATIVE AND INTERNATIONAL EDUCATION:  
A Diversity of Voices

Volume 14

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The series aims to provide books which present new work, in which the range of methodologies associated with comparative education and inter-national education are both exemplified and opened up for debate. As the series develops, it is intended that new writers from settings and locations not frequently part of the English language discourse will find a place in the list.

# 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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*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.

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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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## CONTRIBUTORS

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 TIMSS 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

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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

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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.