TITLE PAGE

World Bank influence on policy formation in education:

A systematic review of the literature

Abstract

The World Bank has been called the most influential organization in education reform globally. Not only is it the single largest funder of education for international development, but it also produces knowledge, circulates discourse, and structures policymaking processes in ways that extend its influence far beyond its primary role as a bank. However, while much literature has been produced about the World Bank, the field of education lacks a systematic discussion of what has been reported about how the World Bank influences policy formation at the country level. Through the conduct of a theoretically-informed systematic literature review of 70 publications, this article clarifies and provides examples for the numerous ways that the World Bank influences policy formation. In all, the article documents 11 pathways through which the World Bank influences policymaking. The article concludes by suggesting areas where research on the World Bank can be improved, namely, through more explicit attention to the theoretical and methodological approaches employed. The goal of this review is to encourage scholars to be more specific in their conceptualizations and discussions of World Bank influence, to go beyond general claims of policy imposition or agenda-shaping.

Keywords: World Bank, policy formation, policymaking, international organizations, global governance

World Bank Influence on Policy Formation in Education: A Systematic Review of the Literature

The World Bank is—and has for decades been—one of the most important international organizations in education. This institution not only provides significant financing for education in the form of loans but is also one of the most influential knowledge producers in the field of global education policy, in addition to exercising its influence in a range of other ways that are less obvious. In the words of two experts on the World Bank:

> Over the past 50 years, the World Bank has arguably become the epicentre for the global governance of social policy within emerging economies and low-income societies. The [World] Bank is the largest single international provider of development finance to governments. Its staffing and internal resources tower over those of other international institutions, and it is regarded by other providers of international development assistance as a key source of policy evidence and policy advice. (Mundy & Verger, 2015, p. 9)

This combination of characteristics has led Tarabini (2009) to conclude that the World Bank has "a quasi-monopoly in the area of international aid for educational development" (p. 206).

However, while much literature has been produced about the World Bank, the field of education lacks a systematic discussion of what is known about how the World Bank influences policy formation at the country level. That is, while there is a tremendous number of publications about the World Bank, and while the World Bank is the subject of considerable debate, it is difficult to grasp the combined insights of available literature. In response, the

present article makes a contribution by clarifying what is known about the World Bank when it comes to the ways that it is able to affect policymaking.[1]

The goal of this review is to encourage scholars to be more specific in their conceptualizations and discussions of the influence wielded by international organizations, that is, to go beyond general claims of policy imposition or agenda-shaping to include, as well, awareness of the specific avenues through which this influence is exercised in the process of education policy formation. As Niemann and Martens (2018) state, "the way in which [international organizations] actually impact states' behavior remains the subject of a contested theoretical debate" (p. 269). We additionally show how the nuance provided in this article—by analyzing specific "pathways" of influence in relation to the World Bank—is valuable, first, because conceptually-informed discussions of World Bank influence are few, and, second, because it allows us to make a contribution to the literature on policy diffusion. Whereas this literature tends to focus on policy diffusion generally, meaning in global discourse, across international organizations, via policy entrepreneurs, or in the text of countries' policy documents, the present article focuses specifically on the actions and effects of an international development bank in terms of policy development at the national level.

Theoretically, the findings are discussed, first, in terms of the empirical pathways through which World Bank influence operates. These tangible pathways are then analyzed in terms of their contribution to different dimensions of power (Lukes, 2005). Drawing on Lukes (2005), these dimensions of power relate (a) to the ability to influence the direction of reform in formal decision-making processes by successfully advancing one's interests (over the interests of

[1] See Caravaca et al. (2022) for a literature review on the World Bank and policy enactment.

others); (b) the ability to shape others' preferences, to steer them towards certain decisions, or to prevent certain decisions from being made; and (c) the ability to use "social forces and institutional practices" to keep issues which are viewed unfavorably out of politics and policy, or, conversely, to ensure that other issues are included (Lukes, 2005, p. 28).

Before engaging in analytic and theoretical discussion, the following section first describes some essential features of the World Bank. The subsequent section explains the theoretical and analytic concepts and contributions used and made by this article. This is followed a characterization of the methods and sample upon which this article is based, before then turning to results, discussion, and conclusions.

World Bank Essential Features

The World Bank is a multilateral organization, meaning that its governing bodies are controlled by representatives from the organization's member countries. Although referred to in the singular, the World Bank is actually a group of five institutions. For the purposes of this article, we use the term World Bank to refer to two entities: First, the International Bank for Reconstruction and Development, which provides loans to both middle-income countries and some lower-income countries (those with good credit rating), and, second, the International Development Association, which offers interest-free loans, grants, and other policy services to low-income countries. Both of these arms of the World Bank only work with governmental counterparts (as opposed to the private sector).

Structurally, there are two dimensions to how the World Bank works that are worth mentioning. One side is dedicated to lending and policy reform at the national level. The other side focuses on research, the creation of knowledge products, and shaping the debate around development generally—though there are synergies across these two dimensions. All of the

World Bank's activities—across such sectors as agriculture, energy and extractives, finance, public administration, social protection, and transportation—respond to its main purpose: to facilitate the stability and grow of global capitalism. Education fits into this picture through its contribution to human capital formation and the competitiveness of national economies.[2]

The World Bank was created in 1944 but did not offer its first education loan until 1962. Since that time, lending priorities related to education have varied.[3] The focus on physical infrastructure, vocational training, and post-primary education of the 1960s and 1970s shifted to a focus on primary education in the 1980s and 1990s. The second half of the 1990s and 2000s saw a shift to a focus on governance reforms (i.e., how to manage education systems more efficiently and accountably). The late 2000s and 2010s saw a reorientation to secondary education, whole-system approaches to reform, public-private partnerships, and ensuring increased learning outcomes (rather than only educational access).

Shifts in reform priorities within the World Bank as well as changing trends in development thinking more generally have to some extent influenced the themes around which loans have centered. At the same time, however, loans are necessarily negotiated together with country counterparts. To a greater or lesser extent over time, World Bank loans have responded to the situation, priorities, and constraints that are present at the country level. World Bank staff develop the loan documents that are then signed by the borrowing government and the World Bank's executive directors. Over time, education loans as a percentage of total World Bank

[2] See Klees (2016) for more on the assumptions behind these connections.

[3] See Edwards and Storen (2017b), Heyneman (2003), and Mundy and Verger (2015) on how the World Bank's internal structures and loan priorities have changed over time.

lending have varied from ~1.5% in the early 1960s to a high of ~9.5% in the early 2000s. Total commitments to education have generally reflected an upward trend over time, with research showing that new commitments to this sector reached a peak of over $3.5 billion in 2008-2010 alone (Mundy & Verger, 2015). Figures from 2021 show that education represented 8% of the $66.5 billion in total lending during that year (World Bank, 2021).

Theory

Theoretically, this literature review connects with the themes of policy diffusion and the influence of international organizations. There is considerable literature on the forms of influence of international organizations. However, the literature that conceptualizes these has tended not to focus on the World Bank, focusing instead on the European Union; the Organization for Economic Cooperation and Development; or the United Nations Education, Science, and Culture Organization. Studies on these organizations have highlighted that they can, among other ways, exercise their influence through: benchmarking, which refers to highlighting "the practices and policies of 'high-performing' countries or regions" as best practices for others to use as a comparison and to guide their own reforms (Santos & Kauko, 2021, p. 399); peer reviews, in which case OECD staff and independent experts provide countries with recommendations and guidance "on how to improve the functioning and the performance of a system" (Browes & Verger, 2021, p. 406); and other forms of transnational communication related, for example, to lesson-drawing, problem-solving, and international policy promotion (Bieber & Martens, 2011; Jallade, 2011). However, all these forms of influence relate conceptually to agenda-setting. To understand the work of the World Bank, concepts are needed that also speak to its ability to impose reforms and to control the rules of game.

Theorists of policy diffusion have conceptualized a role for international organizations (Simmons et al., 2007). We share the central concern of many of these authors related to the way that various "international governing organizations … are increasingly playing a role in the spread of ideas, programs and institutions around the globe" (Dolowitz & Marsh, 2000, p. 11). However, we differ in our conceptual strategy. Rather than focusing on policy diffusion generally (e.g., across international organizations, in global discourse, or by specific policy entrepreneurs), our analysis centers on the specific strategies pursued by a particular international organization to influence policy formation at the national level.

To this end, the coding and analysis of World Bank influence has been guided by an analytic framework that draws on the work of two authors (namely, Roger Dale and Joel Samoff) who have written extensively on the forms of influence of international organizations (see, e.g., Dale 1999, 2000; Samoff, 1993, 1999, 2004, 2009).[4] Figure 1 provides a summary of the forms

[4] Samoff has explored the pathways through which foreign aid has an impact, often with an emphasis on the concrete interactions between foreign aid organizations and their local counterparts. Dale, for his part, has tended to focus more (although not solely) on the mechanisms established between countries and international organizations that do not prioritize foreign aid. The analytic framework for the present article has combined, retained and, where appropriate, separated out, those pathways of influence from each of these authors that are relevant to the World Bank. Some of the forms of influence proposed by Dale and Samoff include 'harmonization', 'dissemination', 'standardization', 'installing interdependence', 'aid provision and management', and 'certification', among others. The most relevant publications for more information on these forms of influence are Dale (1999) and Samoff (2009). For recent

of influence, of which there are 11. They are defined as "pathways," which are taken here to mean those observable avenues through which the World Bank exercises its influence (Samoff, 2009).[5] As will be seen in the discussion of results, these pathways are appropriate for our purposes because they correspond with the wide range of means through which the World Bank can exercise its influence—from issuing loans to producing research, offering technical assistance, and guiding the work and investments of other international organizations, etc.

Following the findings section, these pathways of influence are discussed theoretically in terms of their contribution to different dimensions of power, as developed by Lukes (2005). The author, in his well-known book '*Power: A Radical View*', first published in 1974, intended to contribute "to an ongoing debate, mainly among American political scientists and sociologists, about an interesting question: how to think about power theoretically and how to study it empirically" (Lukes, 2005, p. 1). As noted in the introduction to this article, Lukes' (2005) three dimensions of power relate (a) to the ability to influence the direction of reform in formal decision-making processes by successfully advancing one's interests (over the interests of others); (b) the ability to shape others' preferences, to steer them towards certain decisions, or to prevent certain decisions from being made; and (c) the ability to use "social forces and

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work that has sought to update and refine these forms of influence, see Edwards (2018a, 2018b, 2023) and Edwards and Storen (2017b).

[5] The term pathway is preferred to the term mechanism because the former more closely aligns with the purpose of this review; mechanism is a common term in policy diffusion literature but it tends to refer to more abstract and general processes or dynamics of organizational change (e.g., coercive, mimetic, and normative mechanisms; DiMaggio & Powell, 1983).

institutional practices" to keep issues which are viewed unfavorably out of politics and policy, or, conversely, to ensure that other issues are included (Lukes, 2005, p. 28). Dale (1999), in discussing Lukes' (2005) approach to power, pithily summarizes the three dimensions thus:

> The first dimension involves the relatively 'naked' use of superior power and/or is exercised through clearly defined decisionmaking fora. The second dimension centres around the politics of non-decisionmaking and highlights the importance of the ability to exercise power through such means as agenda setting. The final dimension of power concerns the ability to control the 'rules of the game', the processes through which power is defined and exercised. (p. 8)

Lukes' (2005) dimensions represent a valuable contribution to the study of power by going beyond an analysis of power as the ability to advance one's interests in formal political processes to include, as well, forms that are "successively less overt and correspondingly more difficult to counter" (Dale, 1999, p. 8).

However, beyond a simple classification of pathways according to one or another of Lukes' (2005) dimensions of power, it will be shown that many of the World Bank's pathways contribute to multiple dimensions of power at once. This insight speaks to the value of combining Lukes' (2005) dimensions with a more nuanced typology of influence, for while Lukes' (2005) dimensions are theoretically useful for discussing the exercise of power at more abstract levels, the framework of pathways used here helps to identify the range of strategies employed by the World Bank in practice.

Method[6]

Literature Searching

As depicted in Figure 2, literature searching took place during February-June 2019, entailed four phases, and resulted in 70 studies being retained for further analysis. In all phases, the focus was on locating studies that shed light on the involvement and influence of the World Bank in processes of policymaking at the national level. Although this focus is very specific, it can also be difficult to circumscribe conceptually. In our case, by policy we refer to "decisions taken by political actors on behalf of the state" (Rizvi & Lingard, 2010, p. 4). This definition is important because it includes not only laws that may be passed by a national government but also those programs and projects agreed to between a government and the World Bank. Next, and following from this first definition, what counts as the process of policymaking includes not only the writing of the program or project documents themselves, for example, but also all the politics around agenda-setting, that is, which projects to pursue—not to mention how to pursue them, when, who should work on them, what other policy actions might be required prior to a project's

[6] The methodological steps followed in this systematic literature review were informed by EPPI-Centre (2010) and the example of Verger et al. (2016). These steps included (a) determining the need for a review, (b) setting the research question/purpose, (c) elaborating the conceptual framework, (d) defining search terms and inclusion criteria for search results, (e) searching for and obtaining studies, (f) appraising studies and refining the sample based on relevance, (g) describing the studies (h) extracting relevant information, and (i) synthesizing information from across studies. Steps (a)-(c) were described in previous sections. This section focuses on (d)-(i).

launch, and how a given project should be coordinated with the projects supported and processes required by other international organizations in those countries where the World Bank operates.

In phase one, we searched two databases—ERIC and Web of Science—using key terms: World Bank and policymaking/policy formation and governance/education. These databases returned 261 results (ERIC, 104; Web of Science, 157), all of which were initially reviewed for relevance based on title and abstract. Full texts for 54 studies were obtained (ERIC, 21; Web of Science, 33) and further reviewed for relevance. Ultimately, 21 studies were retained. Studies were discarded where they did not provide insight into World Bank involvement and influence in the process of policymaking at the country level, where a full text was not available in English, and where they were not an article, book chapter, or organizational report.

Phase two then entailed target searches and reviews of the studies conducted by scholars who are widely known for their work on the World Bank's influence in education. These authors were: Xavier Bonal, Martin Carnoy, Brent Edwards, Mark Ginsburg, Steve Klees, Karen Mundy, Phillip Jones, Jeremy Rappleye, Susan Robertson, Joel Samoff, Gita Steiner-Khamsi, Nelly Stromquist, Frances Vavrus, and Antoni Verger. This phase resulted in an additional 36 texts being retained in the final sample. It was important to complement phase one with the strategy pursued in phase two because, across studies, inconsistent terminology is used to characterize the focus of research that looks at the involvement of the World Bank in processes related to policy formation. This step, thus, resulted in the inclusion of relevant studies that would otherwise have been excluded.

The same is true for phases three and four. In the former, we did a manual search[7] and then review of the chapters included in key volumes, that is, those edited collections produced by the authors mentioned above and related to the influence of international organizations in education policy formation (Chisholm & Steiner-Khamsi, 2008; Klees et al., 2012; Mundy et al., 2016; Steiner-Khamsi, 2004; Steiner-Khamsi & Waldow, 2013; Silova & Steiner-Khamsi, 2008; Verger et al., 2012, 2018). Phase three led to the addition of six studies to the final sample. Finally, for phase four, we reviewed the literature amassed by the lead author over the past ten years through a series of studies related to the World Bank and its effects on education reform. In all, 235 texts were reviewed; seven additional studies were included in the final sample, based on relevance. This literature had been collected in the context of previous studies about the influence of the World Bank in specific country contexts. In both phases three and four, the same criteria for relevance were applied as in the first two phases.

As can be seen from the above description, this article is not an exhaustive review of all literature on the World Bank, but rather is a review of those studies that provide some insight on the ways that the World Bank contributes to policy *formation* (as opposed to a review of the effects of World Bank projects in practice). We are confident that we are missing few, if any, relevant studies (except books, which were not included), given (a) our extended and deep engagement with the literature on the World Bank, (b) our knowledge of the scholars who have studied this institution (from critical and favorable perspectives), and (c) our inclusions of studies

[7] The manual search entailed the authors of the present article checking each chapter in these edited volumes for their relevance; this approach stands in contrast to the reliance on key words and academic databases, through which other results were identified.

even where the insights on the World Bank's were indirect (meaning that this organization's influence was a secondary focus).

Literature Analysis

Retained studies were reviewed with the use of a literature review template developed by the team specifically for the purpose of this study. In addition to noting some basic characteristics about each piece (e.g., country/region and time period of focus, guiding research question, methods and theory employed), team members used these templates both to guide the review of publications and as a location where they could store relevant quotes and initial notes that would then be coded (per the pathways in Figure 1) and synthesized. Apart from the literature review template, a database in the form of an excel spreadsheet was created in order to record and summarize information about each study.

Literature Characterization

Here, we characterize the 70 studies reviewed. We do this for two reasons: First, to give a sense of the nature of the studies being analyzed, and, second in order to provide for scholars interested in the World Bank and its role in education a broad perspective on, for example, the theoretical and methodological approaches that have been used to understand its influence. By documenting what kinds of focus (e.g., research questions or purpose, geographic area), theory, methods, etc. have been employed, future studies can be more informed when it comes to responding to or complementing what has been done previously. This characterization also allows the reader to be more informed when considering the findings discussed below.

Geographically, the literature retained focused on the following regions: 4 studies (5.71%) focused on East Asia and the Pacific, 4 (5.71%) on Europe and Central Asia, 14 (20.00%) on Latin America and the Caribbean, 4 (5.71%) on the Middle East and North Africa, 7

(10.00%) on South Asia, and 14 (20.00%) on Sub-Saharan Africa.[8] A number of publications (26) were not specific to individual countries but rather focused on the involvement of the World Bank at a broader level (37.14%). The time periods on which studies have tended to focus most are the 1990s (74% of studies) and 2000s (70%), followed by the 2010s (36%), 1980s (33%), 1970s (17%), and the 1960s (9%).[9] As for the type of publication, the great majority of the studies were published as journal articles (81.4%, n=57), followed by book chapters (14.3%, n=10), and, lastly, organizational reports (4.3%, n=3).

It should be noted that not all the publications retained focused explicitly on the World Bank. While this is true in most cases (63% of studies), it is also the case that our final sample includes studies that provide tangential insights into the World Bank's influence (37%). For example, there are studies that focused on the process of policymaking generally, not exclusively on the World Bank's role in that process, albeit still with relevant information on the latter issue.

Interestingly, authors only stated their theoretical orientation in just over half of the studies reviewed (54.29%, n=38). On one hand, this clearly represents an area where there is room for improvement in the literature on the World Bank. On the other hand, it is possible, as we have done, to infer the theoretical orientation employed by authors when it comes to understanding the role of the World Bank. Table 1 reflects the categorization of orientations used in our retained sample. As can be seen, the overwhelming majority of studies are grounded in perspectives that reflect either a global governance orientation (meaning simply that authors

[8] Note: Three studies addressed two different regions, so the percentage exceeds 100%.

[9] Some studies address more than one decade, thus explaining why the percentages total to more than 100%.

view, describe, and analyze policymaking in the context of globalization as affected by the involvement of a range of different international organizations) or a political economy orientation (wherein authors focus more on the political and economic structures that constrain the policy options and policymaking processes of countries).

The situation with regard to methodological approaches is similar to that with theory. Here, authors only clearly described their methods in just under half of the studies (44.29%, n=31). In other cases, authors stated their general methodological approach but without elaboration on their data collection or data analysis practices. These cases accounted for 18.57% (n=13) of the sample. What also stands out is that authors in 37.14% (n=26) of studies did not state their methods at all, though this is not to say that the approach could not be inferred[10]. Table 2 summarizes the methodological approaches reflected in the studies analyzed. This table shows that all but two studies employed some form of qualitative research.

Pathway Saturation in the Literature Over Time

The final sample can also be characterized in terms of the frequency with which the literature speaks to the pathways by decade. Here, we depict trends in the sample over time, while the following section provides an explanation of each pathway.

There are very few studies that speak to any of the pathways in the 1960s. This makes sense because it is the decade when the World Bank first entered the education sector.

[10] In order to test the robustness of the results, a sensitivity analysis was conducted by excluding those articles that did not state their methods. The results of the analysis show an average variation of 4.35% (with a standard deviation of 0.064) in terms of the frequency that each of the pathways was found to be present in the literature.

Conditionalities and loan-related reports were reported by the literature to be the most prevalent during this decade (with 6% and 4.5% of studies mentioning them, respectively). Pilot projects were not mentioned at all by the literature to be present in this decade.

The literature found all pathways to be mentioned more frequently in the 1970s and 1980s. The pathway most commonly mentioned in the 1970s in the literature is loans (9.2%), closely followed by loan conditionalities (9%), and coordination of foreign aid (8.3%). Notably, for the decade of the 1980s, all pathways were mentioned in 10% or more of studies retained, except for international events (8.6%). The top five pathways in terms of frequency of mention in the 1980s were technical assistance (19.2%), loan conditionalities (18.2%), research studies (18%), actor recruitment and deployment (17.2%), and loans (15.4%).

The literature demonstrates a jump again in the 1990s, with all pathways being present in at least 26.3% of studies. Interestingly, pilot projects were the evinced in 38.5% of studies, followed by loan conditionalities (34.9%), research studies (32.8%), international events (31%), and actor recruitment and deployment (31%). Percentages for all pathways remained at about the same levels in the 2000s. All pathways were reported in at least 21% of studies, although the top mention became international events (34.5%), followed by certification role (34.2%), general publications (32.8%), pilot projects (30.8%), and loan-related reports (30.6%).

The 2010s show a decrease in mentions of all pathways, which could be a consequence of fewer studies being produced on the World Bank in this period. During this time, certification role was the high mention (21%), with international events and general publications being tied (20.7%), followed by actor recruitment and deployment (17.2%) and pilot projects (15.4%). The remaining pathways were all mentioned in at least 10.2% of studies.

What the above figures suggest is that all pathways were more prevalent in the World Bank's operations in more recent years than they were in the 1960s and 1970s. However, and perhaps surprisingly, a number of pathways outside of the World Bank's core business of lending have become more commonly mentioned in recent decades. The prevalence in recent decades of pathways such as international events, certification role, general publications, pilot projects, and actor recruitment and deployment suggest that the World Bank has diversified its strategies of influence, while still relying on loans and loan-related mechanisms (e.g., conditionalities and loan-related reports). The trends demonstrated in the percentages above reflect the claims made by individual authors regarding the rise in influence over time of pathways related to knowledge production and dissemination as well as aid coordination, as further discussed in the results section.

Results

This section presents the discussion of the different pathways through which the World Bank influences policy formation, broadly conceived, meaning from idea generation to the approval of specific policy texts of program agreements.[11] The order in which the pathways are presented reflects their order in Figure 1, with that listing being determined according to the conceptual relationship among the pathways. In discussing each form of influence, examples are provided from the literature to illuminate how they have operated in practice. Table 3 summarizes the prevalence of the different pathways as found in the retained literature. As can be seen there, the common pathway was loans, to which we now turn.

Loans

[11] Citations in this section are from our review; see online appendix for complete list of studies.

Given that the World Bank is, first and foremost, a bank, the pathway of loans is the most obvious and common form of influence. The scale of World Bank lending can be enormous.[12] Top borrowers such as Brazil and India, during the period 1987-2012 alone agreed to education-related loans valuing more than $8 billion (Mundy & Verger, 2015). The number of total loan projects can also be incredibly high. Yang (2008), for example, reports that China had 284 "projects involving education" during 1981-2007 for a total value of $42 billion (p. 422). Perhaps because of the self-evident nature of this pathway, it has not tended to be discussed independently of other pathways such as conditionalities (discussed next). However, given that not all loans have explicit conditionalities attached, the decision was made to discuss the provision of financial resources separately.

The projects for which loans are given tend to range from 5-7 years in duration and are typically only given for relatively large amounts, in the millions of dollars (Alexander, 2001; Heyneman, 2003). It has been shown that individual projects can be awarded over $1 billion in lending (Stromquist, 1999). But project lending is not the only form of lending offered by the World Bank. Further discussed below, there is also "adjustment lending," where loan funds are disbursed more quickly, upon the passage of required policy changes (Alexander, 2001).

Loans are also associated with a cumbersome administrative processes. As De Moura Castro (2002) writes,

[12] For figures on World Bank lending as a percentage of global aid to education, see Mundy (2002) and Mundy and Verger (2015). To get a sense of the relative weight of World Bank funding for education in development, consider that, in 1995, "the volume of Bank loans ($3.1 billion) represented 28% of all external finance to education" (Alexander, 2001, p. 289).

> Each loan structures the way the funds will be spent and does so in ample detail. This is why bank operations are so unbelievably complicated. Indeed, the local administrative officers who have to deal with the development banks hardly can believe how much more red tape they have to deal with. (p. 390)

At the same time, the loan agreement process can be a "balancing act" (De Moura Castro, 2002, p. 391) for those who represent the World Bank. Project managers—of which there is at least one per project—have to sell the loan idea and amount to the borrowing country, in addition to steering the loan through the internal approval processes of the World Bank (De Moura Castro, 2002). In exceptional circumstances, the World Bank may issue loans together with other multilateral banks, such as the Inter-American Development Bank, when there is sufficient joint interest and confidence in a given project (Edwards et al., 2015). There is also evidence that World Bank loans may be matched by other multilateral banks, for example, the Asian Development Bank, thereby allowing a country to receive additional financial support for the same set of activities (Madden, 2014).

At the country level, World Bank funding represents a small percentage of overall funding to the education sector (typically 2-3%) but a sizable percentage of "discretionary spending and new investment in education" (Hunter & Brown, 2000, p. 118). As such, it can have a large impact, beyond what one would expect. In the words of Hunter and Brown (2000):

> given that governments in client countries often continue funding items that initially began as World Bank projects, these initiatives can effectively put in motion recurrent expenditures… As such, the influence of the World Bank can be expected to exceed what a quick glance at the financial value of individual education loans might imply (p. 118).

The same tendency applies to the pathway of pilot projects, discussed later.

Loans are issued to support a range of activities, including school infrastructure and facilities (e.g., building schools), training, sector planning activities, administrative reforms, and technical assistance (Nagel & Snyder, 1989; Edwards, 2015; Edwards et al., 2015). Loans can be used to plan and implement initiatives that generate additional funding and in-kind contributions from families, for example, through strategies that rely on community participation in school management (Tadevosyan, 2008; Mundy & Menashy, 2012; Vavrus & Kwauk, 2013). Unsurprisingly, one of the reasons for which governments look to the World Bank for funding is that it offers financing at below-market rates—and because the World Bank, unlike typical banks, is willing to lend for social programs, such as those related to education (Terzian, 2016).

The relative importance of World Bank lending in country contexts where discretional spending is limited means that it is a gateway to other forms of influence (Edwards & Storen, 2017a). Other forms of engagement, in turn, can promote additional lending. For example, World Bank evaluations of their own projects can call for more funding to ensure project success (Steiner-Khamsi & Stolpe, 2004). And the size of World Bank funding can lead to "growing influence in defining the orientation that … programs have to follow" (Tarabini, 2008, p. 425).

Conditionalities

Conditionalities are a common feature of loans that have received significant attention, especially since the 1980s. Conditionalities are those requirements or conditions that the World Bank attaches to the approval or disbursement of loans. It is important to note that loans unrelated to education may include requirements for education sector reform—and vice versa. Although conditionalities are associated with loans, they are included here as a separate pathway because they can be understood as a distinct avenue of influence that works together with loans.

Even when they do not agree with them, borrowers are compelled to consent to World Bank conditionalities when they are in dire need of funding. To envision how the process proceeds, consider this description by Jones (2004):

> When the World Bank is ready to 'invite' a government to embrace policy shifts in … fundamental areas, it is usually a matter of waiting for that borrower's next loan approval process. Thus, the loan might be for an education project, and it would be straightforward for that project to be approved by the [World] Bank's Executive Directors in the context of the broader policy framework prescribed by the [World] Bank and the [International Monetary Fund]. Borrowers, if they indeed want the loan funds to flow, have little option but to sign off on the attached loan covenants. (p. 190)

At the same time, and as Jones (2004) points out, borrowing governments still have latitude to exercise their agency, as when they ignore or delay compliance. Borrowers with stronger economies may feel more comfortable flouting, that is, failing to comply with, World Bank requirements or policy preferences because they may not be as dependent on World Bank funding (Steiner-Khamsi & Stolpe, 2004). In the case of "weaker borrowers," doing so is riskier if they want to keep open the option of future borrowing, and if they want to preserve their credit worthiness (Carnoy, 1995; Jones, 2004).

The conditions that the World Bank places on loans relate to policy changes that they believe to be necessary, and they can be attached either explicitly or implicitly (Hunter & Brown, 2000). World Bank requirements may be directed at broad reforms, based on their analysis of the overall needs of a sector or economy, or the conditions may relate to more specific actions to ensure the success of a given project. The studies reviewed for this article reveal that the World Bank has made loan disbursement conditional on such things as changes to organizational

structures, legal reforms to support the decentralization of the education system, and increased funding to the education sector or to primary education (more on this below) (Bonal, 2002; Edwards, 2015; Edwards et al., 2015). Notably, when initial changes become embedded in policy or legal reforms, they are more difficult to undo.

Perhaps the most well-known conditionalities are those that became famous starting in the 1980s, when the World Bank imposed a set of economic and social policy reforms in the context of economic crisis (Bonal, 2002; Carnoy, 1995; Stromquist 1999). This time period was known as the "adjustment era" because it was through "structural adjustment loans" (SAPs) that the World Bank required rapid changes in macroeconomic policy (Heyneman, 2003). Vavrus's research (2004) describes how, in Tanzania, the World Bank, through SAPs, required "trade liberalization, cost sharing for social services, eliminating consumer and agricultural subsidies, reducing civil service employment, and promoting the privatization of programs in many sectors, including education and agriculture" (Vavrus, 2004, p. 143). This set of reforms is known as the "Washington Consensus" since it has been promoted (or required) by both the World Bank and the International Monetary Fund, which are headquartered in Washington, D.C. (Bonal, 2002).

Numerous studies highlight the reality that World Bank education reforms in the 1980s and 1990s were enacted within the context of SAPs and their requirements (Bonal, 2002; Edwards, 2015; Edwards et al., 2015; Ginsburg et al., 2010; Takala, 1998). As Takala (1998) pointed out, because borrowing governments subject to SAPs were "heavily dependent on continued external funding," the World Bank was "able to exert leverage on educational policies" (p. 320). Usefully, Bonal (2002) goes beyond claims of influence to delineate both the direct and indirect consequences of SAPs on education. Direct consequences included the reduction of funding to education (due to required public spending cuts), which in turn

negatively impacted the quality of, and access to, education.[13] Indirect consequences included a reduction in earnings for those affected by economic liberalization, with the implication being that, for many families, the opportunity cost of education went up along with the percentage of income consumed by education-related fees, which, in turn "prevented low-income families from investing in education" (Bonal, 2002, p. 11). Because SAPs have been implemented in the context of economic crises, and because, as just noted, they put downward pressure on family income, they likely also negatively impacted the market for private provision, given that families could not afford private tuition. At the same time, SAPs may have also encouraged the emergence of private schools for the poor, at least in long-term perspective, given that SAPs entailed a reduction in investment in public education, with the implication being that those areas which are underserved by public schools are seen as potential markets for such private schools.

Frustratingly for borrowers, conditionalities are one-way in nature in that donors have the ability to penalize borrowing countries if they do not take the actions deemed necessary by the lender, but there is no indication that borrowers have the ability to penalize the World Bank (aside from avoiding future engagement with it) if it does not follow through on its commitments, or if the assistance provided is not what is needed. Also frustrating can be the large debt burden that borrowing and SAPs can create. Vavrus (2004) speaks to the cumulative effect of SAPs on Tanzania:

> Despite their achievements in bringing down the country's inflation rate, SAPs have failed to alleviate Tanzania's debt burden and its dependence on aid from international

[13] Though Ginsburg et al. (2010) report that, in Egypt, education was prioritized because it adopted the language of "education as an investment and not a social expenditure" (p. 11).

> financial institutions. Tanzania owes approximately $7 billion to different lenders, with its debt servicing payments at nearly $275 million per year, or roughly 35% of its earnings from exports (Oxfam, 1998). In terms of social services, this figure is approximately four times as much as the country spends on social services, such as basic education. (p. 143)

Placing these debt burden dynamics into broad perspective, Bonal (2002) noted that, "since the mid-1980s, third world countries have become net capital exporters to northern countries" and that "debt repayments account for more than capital transfers to the third world" (p. 7).

The negative effects of SAPs and the negative attention that the World Bank has received because of them have led the World Bank to reduce its explicit reliance on the kinds of conditionalities (for macroeconomic reform) for which SAPs were well-known. More recently, in the 2000s, the World Bank began to require the formulation of a Poverty Reduction Strategy Paper as a precondition for lending. The idea was that borrowing governments would, together with civil society, develop a strategy for how the country would pursue economic and social development. However, in practice, some authors have suggested that Poverty Reduction Strategy Papers are SAPs under a different name: the process may have changed but the economic policies that the World Bank wanted to see before approving loans remained the same (Tarabini, 2009). For this reason, Poverty Reduction Strategy Papers were seen as a new form of conditionality.[14] A similar perspective has been voiced by Steiner-Khamsi (2012) more recently in relation to insistence by the World Bank that projects be justified by evidence that comes from

[14] More will be said about Poverty Reduction Strategy Papers when discussing the pathways of loan-related documents and studies.

impact evaluations: "The point I make … is that impact evaluation … has become a means for imposing programmatic conditionality on recipient governments" (p. 10). In these ways, conditionality has evolved but not disappeared; it has become more subtle, less explicit.[15]

Pilot Projects

As the name of this pathway implies, pilot projects are those projects where the World Bank tests a policy or program model, with the focus being those approaches that it is interested to promote or scale up, if deemed successful. It can also be said that pilot projects are useful for experimenting with institutional innovations that would otherwise engender too much resistance, if pursued initially on a larger scale. These small-scale projects are typically required as an initial step in the process of gaining access to funding. They may either be folded into the structure of a project (Luschei, 2004), may be supported (e.g., in the form of technical assistance) before a loan-funded project is developed, or may be adapted from pilot projects supported by other organizations (Edwards, 2018a; Tadevosyan, 2008). The purpose of these projects is to minimize the risk exposure of the World Bank; in testing a model at small scale prior to making major outlays of funding, the World Bank is able, to some extent, to ensure that the model in question is workable in the context where it will be funded. The processes of supervision and evaluation that typically accompany these pilot projects allow for learning and insights that inform modifications to the policy or program design. Pilot projects can also serve to convince the borrowing government and gatekeepers inside the World Bank that a particular model should be supported with additional resources (Edwards, 2015).

[15] One area for future research is the way that procurement requirements (e.g., related to how the money must be spent) function as a form of conditionality.

Studies that mention pilot projects tend to discuss their roles in terms of helping to gain an organizational foothold within the borrowing government and/or helping to create political support for the model. Carney and Bista (2009), for example, in speaking about the origins of Nepal's community-based management approach to education, write that the model was a pilot project before being "integrated quickly into the overall strategic plan of the Ministry of Education and Sports" (p. 190). Perhaps unsurprisingly, the World Bank can incentivize experimentation via pilot projects when borrowing governments are economically vulnerable. As one interviewee from Egypt is quoted as saying in reference to lending from the World Bank:

> The Egyptian government's financial resource capacity, moreover, was enhanced, but with significant restrictions on public expenditure, when it negotiated a structural adjustment program to obtain a loan from the World Bank. These fiscal challenges, exacerbated by quantitative expansion of the education system, encouraged the Mubarak government to experiment with laws and pilot projects toward decentralizing responsibilities (if not authority) and increasing community participation. (Ginsburg et al., 2010, p. 38)

Once they are approved to serve as the basis for loan funding, the models initially contained in pilot projects can be scaled up and supported over many years (Luschei, 2004; Mangla, 2018), with borrowing governments sometimes taking ownership over the initiative, where doing so is politically advantageous (Edwards, 2015; Edwards et al., 2015). Some well-known initiatives that began as pilot projects include the approach of community-based management in El Salvador (Edwards, 2015; Edwards et al., 2015) as well as the approach of Escuela Nueva, which is based around multi-grade rural schools, and which was adapted from Colombia to Brazil with World Bank support (Luschei, 2004).

Advice and Recommendations (Technical Assistance)

Technical assistance is the term used to refer to the advice and recommendations given by the World Bank staff and consultants. Technical assistance is offered by the World Bank at all points in the process of engagement with borrowers. It is the oil that lubricates the operations of the World Bank and, as such, it is offered both when preparing for and when implementing projects and other activities (such as research) supported by the World Bank. The literature reviewed gives examples of technical assistance being provided in relation to the design of new organizational structures to enhance efficiency (Edwards et al., 2015), the writing of new laws (Edwards et al., 2015), the design of policies and programs (Espinoza, 2017; Hamamo, 2008; Rappleye & Un, 2018), and the implementation of core project activities (Hamamo, 2008). On this point, Carney and Bista (2009) reveal that World Bank advisors embedded their frameworks into the policymaking process in Nepal in the 1990s. When asked about the goals that guided the master plan that was being developed together with a range of development partners, one government participant was quoted as saying that the underlying framework was "given to us by the World Bank," who told them that the "the education sector should be seen in terms of these four variables [(i.e., quality, access, efficiency, and relevance)]" (Carney & Bista, 2009, p. 197).

For the moment, the point here is not the substance of the framework but the fact that the World Bank's frameworks and perspectives reach beyond individual projects to become ingrained in the government's processes of strategy development and policy formation. With this in mind, it is important to be aware of the ideological nature of the World Bank's work and the fact that technical assistance tends to reflect the broader neoliberal policy consensus in the field of education and international development (Bernasconi, 2007; Bonal, 2002; Carney &

Bista, 2009).[16] This is not to say that countries cannot use technical assistance to their advantage when they are intent on pursuing projects, such as teacher training, that align less clearly with the kinds of market-based reforms for which the World Bank is well-known (Fontdevila & Verger, 2015). Indeed, as Fontdevila and Verger (2015) find in their review of teacher-related World Bank projects, a full three-quarters (77.9%) of them are focused on strengthening or improving the provision of traditional forms of pre-service and in-service training, as opposed to promoting alternative/accelerated certification pathways or policies that would make it easier for less well-prepared individuals to enter the teaching profession. Moreover, 17% of the projects reviewed focused on increasing the entrance requirements to become a teacher. However, while some flexibility exists when it comes to project focus, it is certainly the case that all projects, and thus all technical assistance, must fit with the economic orientation of the World Bank, where education is justified in terms of its contribution to human capital development and, in turn, the contribution of human capital to economic development (see, e.g., Heyneman, 2003).

Technical assistance is in some cases a necessary precursor to funding, but one that is also connected with conditionalities. The "mission" work carried out under the rubric of technical assistance by World Bank staff and consultants can serve to reinforce the need for the kinds of policy changes that the World Bank wants to see. For this reason, technical assistance may not feel like "assistance," and should rather be seen as structural. This is so because

[16] Relatedly, the World Bank's recommendations may not be empirically justified, or can be disputed, given that they ideologically guided (see Klees, 2012). Bonal (2002) gives the example of the long-standing recommendation of the World Bank to invest in primary education rather than higher education because of the supposedly higher rate of return.

technical assistance can manifest as a structural constraint in the sense that the technical assistance provided by the World Bank often indicates what needs to happen or be agreed to in order for the process to move forward. From this perspective, technical assistance is not just discursive or suggestive, but also has a material and structural dimension. As Nafukho and Muyia (2013) write, "African and Asian countries have been compelled to take advice provided by the World Bank in order to receive financial assistance" (Nafukho & Muyia, 2013, p. 648).

At the same time, authors have asserted that countries are, depending on their particular situation, able to resist World Bank advances. In the words of Hunter and Brown (2000), "the World Bank can pressure but cannot force the … government to adopt its recommendations" (p. 135), including those offered through the provision of technical assistance. What's more, these same authors, in contrast to many others (e.g., Carnoy, 1995; Takala, 1998; Jones, 2004), see the World Bank as being too deferential in their interaction with borrowing governments, as when they write, "Perhaps the caution World Bank officials have begun to exercise with regard to developing country sovereignty actually impairs their ability to combat poverty and champion basic needs. … [T]he 'excessive respect' World Bank officials accord to domestic political processes *undermines technocratic decision making* and hurts the poor" (Hunter & Brown, 2000, p. 135, emphasis added).

Notwithstanding the above perspective, there are multiple reasons for which the technical assistance of the World Bank can be very influential, beyond simply the need of borrowers for funding. Often, there are few technocrats within the government negotiating with the World Bank who can (or who feel comfortable) pushing back on the recommendations made by this organization. This is in addition to the reality that ministers of education themselves, as political appointees, may lack a technical background, as Hunter and Brown (2000) suggest.

Furthermore, "the fierce bureaucratic politics that characterize decision making" can have the effect of "undermining the emergence of a technocratic core able to promote serious proposals," with the implication being that "the technocrats who serve as domestic interlocutors for the World Bank are often relatively small in number and weak within the bureaucracy," especially in the "smallest and poorest countries" (Hunter & Brown, 2000, pp. 131-132). Elsewhere, Lightfoot (2015) quotes a senior government advisor as saying that "there is no discipline around policy making—the policy agenda is whatever happens to be in the Minister's in-tray—there are procedures but not policies" (p. 712). Taking a long-term perspective, other authors have suggested that the lack of technically trained staff is at least partially attributable to the "dismantling of Education Ministries" that has been required by the World Bank as part of reducing public spending and downsizing government bureaucracies (Torres, 2000, p. 180, as cited in De Moura Castro, 2002, p. 387). In this way, and combined with the reductions in education sector funding that have been required historically through SAPs, the World Bank's approach may work against the development of technical capacity within the government.

In concluding this section, it is worth emphasizing not only the significant influence of World Bank advice in processes of policymaking but also its global reach and engagement. Technical assistance is not only about teaching borrowers how to do things but also about the World Bank itself gaining experience and skills that it can leverage in other countries.[17] Interestingly, this observation also connects back to the pathway of pilot projects, where, as noted, the World Bank can experiment with—and learn from—innovations that it can then adapt and sell elsewhere. Thus, while the World Bank's technical assistance and project design can be

[17] Other international organizations may also emulate the World Bank's projects (Hamano, 2008)

context insensitive (Rappleye & Un, 2018), there is evidence that both the borrower and the World Bank are teaching each other, though payments for these lessons flow in one direction.

Loan-related Reports and Studies

Closely related to—and, indeed, intertwined with—technical assistance is the pathway of loan-related reports and studies. These reports and studies may be produced by either the World Bank or the borrowing government, or both, working together. Typically, they are associated with the provision of loans. Examples include "early studies, pre-appraisals, sector analyses, public expenditure review, implementation and management reports, and evaluations" (Edwards & Storen, 2017b, p. 15). The purpose of these reports is to indicate what has been done, what has yet to be done, and what should be done. That is, they can serve in the preparation of joint activities or they can assess what progress has been made after the fact. Importantly, ignoring the content of these reports can compromise loan eligibility. An indication of the centrality of these reports and studies to the work of the World Bank is the fact that their production represents a significant expenditure, with 15-20% of the World Bank's administrative resources being allocated here (Thomas & Carnoy, 1992).

"Sector work" is the general name for the kind of activity that goes into the preparation of these reports and studies (Molla, 2014; Thomas & Carnoy, 1992). Thomas and Carnoy (1992) give a description of this term:

> Sector work forms the basis for policy dialogue with governments, design of Bank lending strategies and projects, and promotion of external resource mobilization and coordination. To accomplish this, the Operational Manual recommends that sector reports provide: (a) an overview of country development strategies, (b) a review of

> principal sectoral issues, (e) a discussion of government policies and plans, (d) a list of policy recommendations, and (e) a Bank lending strategy. (p. 1)

Clearly, sector work can have far reaching consequences, in that it not only guides the World Bank's engagement with the government but also seeks to characterize the challenges that face potential sectors for investment and to serve as a point of reference for the coordination of resources provided by other development partners. As with technical assistance, these reports and studies can have the effect of ingraining a "managerial view of education and an emphasis on arguably narrow outcomes" (Mukhopadhyay & Sriprakash, 2011, p. 318).

Separately, Samoff (1999) points out that the approaches taken in the production of reports and studies are frequently adopted or adapted by other donor organizations, with the implication that countries can be faced with homogeneity of worldview across development partners and, thus, with consistency in recommendations that, historically, have focused on education finance, labor market needs, primary education, an expanded role for the private sector, increased student fees, and decentralization of system management, but without much focus (until recently) on learning. Another commonality, at least across World Bank sector work, is that the majority of recommendations contained in sector reports have been found to lack an accompanying discussion of the implications of those recommendations. Put differently, in a review by Thomas and Carnoy (1992) of World Bank sector reports, "only 12% of the recommendations were accompanied by a solid discussion of implications for the educational system as a whole" (p. 16). This implies that the World Bank is more focused on advancing its recommendations—and issuing loans—than carefully accounting for the subsequent side-effects of the suggested policies. As Thomas and Carnoy (1992) further comment, "It is difficult and

analytically questionable to discuss policies in one education sub-sector without referring to their possible implications for other sub-sectors" (p. 16).

As with other pathways, there are limits to the influence of loan-related reports and studies. The policies funded in practice do not always reflect the language and recommendations contained in the World Bank's loan-related documents, for, as Vavrus (2004) notes, national policymakers have leeway and use it to adapt some of the language to the local context. The result is national policies that reflect "contestation and consistency" (Vavrus, 2004, p. 150). One place these dynamics have had the chance to arise has been in the production of the Poverty Reduction Strategy Papers mentioned earlier, in the section on conditionalities. As noted there, these documents, which portray a country's priorities and strategies for economic and social policy, began to be required by the World Bank in the 2000s as a precondition for loans.

Writing specifically on the education sector, based on his experience in Africa, Samoff (1999) writes: "Few if any … studies seemed to have been the product of a sustained dialogue between the external agency and the education community, both governmental and non-governmental, both official and unofficial, within the country studied. The voices of teachers, students, and parents can scarcely be heard" (Samoff, 1999, p. 253). Thus, despite changes to the terminology used to describe the instruments that structure World Bank engagement, some observers see them as a continuation of past practices, that is, as less visible or less obvious "regulatory instruments" that are imposed on borrowers (Molla, 2014, p, 230). Additionally, various authors comment on the lack of cultural sensitivity of the World Bank's reports and studies, which have been shown to look down on the culture of the receiving government (as being the source of the problems or reasons why a project is not going well) while also failing to understand the cultural and historical context of the partner government (Rappleye & Un, 2018).

Other authors have noted the importance of this, that is, of being attentive to such things as "institutional culture" when planning for World Bank programs (Thomas & Carnoy, 1992, p. 10). Where this dimension is not taken into account, World Bank sector reports have been found to be heavy on critique (e.g., of government spending patterns) and light on cultural and political analysis that explains the borrower's behavior (Thomas & Carnoy, 1992).

Research

Verger et al. (2014) write that the World Bank, in addition being the "largest single international funder of education for development," stands out because "the technical and knowledge-based resources it devotes to education dwarf those of other international institutions" (p. 381). These resources are put to use in the evaluation of the programs and policies that the World Bank supports (e.g., through loans and technical assistance) in addition to carrying out studies of other policies of interest (Samoff, 1993; Vavrus & Kwauk, 2013; Verger, 2012). These studies lead to different kinds of research products, such as World Bank working papers, academic journal articles, books, and book chapters.

While there is a rich and vast literature on the production, dissemination, and influence of World Bank research at the global level, the studies retained in this literature review focus more on the role of its research in policy formation. Perhaps the most famous example of the influence of World Bank research relates to the rate of return analysis that became central to World Bank lending in the 1980s, which led to the promotion (and requirement) of investing in primary education rather than higher education, because the former showed greater contributions to future earnings (Bonal, 2002; Heyneman, 2003). The World Bank also contracts academics or researchers (often with a high profile) to conduct evaluations of their programs, or even of programs that they are not funding but which interest them (Samoff, 1993; Tarabini, 2008).

These evaluations can later be used to justify loan programs in other countries (Luschei, 2004; Nagel & Snyder, 1989). Put differently, the World Bank has a history of producing or commissioning research that it then cites in order to justify the promotion of its preferred programs and policies (Klees, 2002; Verger, 2012).

However, as various authors point out, not all World Bank research has the kind of influence described above (Mundy & Menashy, 2014; Fontdevila & Verger, 2015). The research that is produced to shape the global reform agenda and which is intended to align with the way the organization presents its worldview and guiding principles does not always guide the priorities for lending in negotiations with borrowing governments (Mundy, 2002; Samoff, 1993).[18] In these contexts, governmental priorities unrelated to World Bank reform principles (i.e., competition, accountability, efficiency, etc.) often prevail. The World Bank is still willing to lend in these cases because it means the issuance of new loans, which is their core business.

There is also country-level research that is not directly connected to loan preparation, but which can eventually affect it. Yang (2010), for example, mentions two World Bank reports published in the 1980s on the education sector in China, which would have a significant impact on the political priorities of the government. Likewise, in El Salvador, World Bank studies on secondary education in the 2000s contributed to shifting government attention away from primary education, after years of focus on this level in the context of the global Education for All campaign and previous World Bank recommendations to prioritize this level (Edwards, 2013).

[18] Mundy (2002, p. 500) and Samoff (1993, p. 214) offer insightful discussions about why the production and influence of World Bank research was affected in the 1980s and 1990s.

Finally, we note that World Bank research, due to its highly credible nature (Edwards & Loucel, 2016) and perceptions of it being "irrefutable" (Bonal, 2002, p. 9), has an impact on other donor organizations. Also relevant here is the fact that, in the post-Great Recession context, other donor organizations are both hiring more generalists who are not specialists in education and investing less in research. The result is that other aid agencies "are increasingly dependent on external, specialized knowledge, like that provided by the [World] Bank" (Verger et al., 2014, p. 394). For our purposes, the point here is that World Bank research products and capacities influence the organizational and ideational environment in which borrowing governments operate and set their policies (Molla, 2014).

General Publications

General publications are closely related with the previous pathway—i.e., research. The difference here is that, rather than presenting findings from individual studies, many of the more general publications are either informational in nature or are intended to portray the state of the world, to advance a particular reform idea, or to characterize the problems to which countries must respond. Molla (2014) brings attention to this pathway by highlighting that the World Bank produces "reports on lessons of experience, collections of best practices, and comparative evaluation of performances of different countries" (p. 235). While they may be based on previous research carried out by the World Bank, they tend not to be products of applied research themselves. Examples of general publications include small reports on individual projects that are intended to highlight promising practices or new approaches. One series of publications is known as *En Breve*, which the World Bank's website describes as a "set of notes" that "highlights lessons from operational and analytical programs in Latin America and the Caribbean" (World Bank, 2020). Another significant type of publication is the periodic

education sector strategy papers, which clarify the principles and policies that the World Bank favors when thinking about how best to reform education systems (Boyd & Owens, 2015; Verger et al., 2014). Perhaps the most well-known publication related to this pathway is the annual World Development Report, which each year focuses on a different theme related to economic development (and which, in 2018, focused on education). Likewise, one might include here the academic journals produced by the World Bank, such as the *World Bank Research Observer* and the *World Bank Economic Review*, with the first of these designated as "enjoy[ing] the largest circulation of any economic title" worldwide (World Bank, 2016).

As with the research pathway, our review does not include the majority of the literature that focuses on general publications, given that research on these publications often does not connect their production and circulation to processes of policy formation, though there is undoubtedly an indirect connection in that the ideas contained in these publications can influence the perceptions and priorities of policymakers at the country level (Hunter & Brown, 2000). In the words of Hunter and Brown (2000), by "diffusing knowledge among development professionals," general publications are used to "induce compliance" with the World Bank's worldview or preferred frameworks (p. 117). Practically speaking, the process of diffusion is—or has historically been—facilitated by the strategy of the World Bank to send compact discs loaded with its publications directly to country governments and to other international aid agencies. One representative of a bilateral organization was quoted by Verger et al. (2014) as saying that: "'the [World] Bank sends all of its publications in a CD annually, which are copied 50 times by the Ministry and sent to everyone working in the field'" (p. 395). Through such practices, the World Bank enhances the chances that its policies and perspectives are adopted by other donor agencies and by country clients (Nagel & Snyder, 1989; Takala, 1998). In all cases

of general publications, it must be remembered that the World Bank is trying to secure buy-in from others for its worldview, and thus there is no discussion of the assumptions on which these visions are based (Robertson, 2005). This is not surprising when one considers that, necessarily, the general publications of the World Bank are normative in nature, in that they promote a certain vision for how the world is or should be (Buckner, 2018).

Certifying Role

Approval given by the World Bank for a course of action taken by a borrowing government indicates to other development partners that a country government is pursuing appropriate steps toward reform in a satisfactory fashion, and that it is therefore trustworthy. This approval can be conceived as a form of "certification." The certification role played by the World Bank is how aid providers often determine whether or not a country is, for example, making progress along an agreed-upon trajectory (Mangla, 2018), implementing the activities for which it received foreign support (Hamano, 2008; Tarabini, 2008), fulfilling its commitments to modify spending patterns, or to decentralize authority (Bonal, 2002; Khanal, 2010).

There are a variety of means through which the World Bank can exercise the certification function. One example is through accolades or awards that are bestowed by the World Bank, as in the case of the President's Award for Excellence, which is given each year to exemplary programs (Edwards, 2018a). Another example is the role that the World Bank plays in the credit rating given to borrowing governments; if they remain in good financial standing with the World Bank, they will likely maintain their access to financial capital from other lenders (Jones, 2004). In other words, the certification role indicates to other international organizations that the government is taking appropriate steps and that the government will follow the required procedures and protocols as outlined by the World Bank in order to make progress on the agreed-

upon actions. In this way, the World Bank is a barometer to which other organizations look to gauge whether they should involve themselves in a country or not. As Moutsios (2009) posits, "it is not the World Bank's share in the global spending on education which makes its role financially important. It is its influence...on external aid agencies that matters" (p. 470).

The World Bank's approval for a program also sends the message to the development community that the policy or program in question may hold some promise if implemented elsewhere. Consider the work of Tarabini (2008), who focuses on the example of a conditional cash transfer program in Brazil (where families received compensation if their children remained in school). While the program itself was funded entirely through Brazil's national budget, the program evaluations published by the World Bank referred to the program as a "paradigmatic example" and a model for other countries to follow. As a result of these World Bank evaluations, the program has received "great international legitimacy" (Luschei, 2004, p. 419). The approach of community-based management of education in El Salvador has similarly been "certified" thanks to the positive outcomes that were claimed in a series of World Bank studies (Edwards & Loucel, 2016; Edwards et al., 2015). These positive findings helped to attract attention from around the world, in addition to giving confidence to the borrowing government that they were pursuing a worthy reform.

Coordination of Foreign Aid

The World Bank possesses more professional capacity than many other development institutions; it may also wield more macroeconomic leverage, even when not the largest lender. As such, the World Bank often oversees the provision and use of other agencies' funds—and thus it becomes the primary point of reference for how to organize and manage development assistance. In policy coordination bodies, their voice has often carried the most weight.

The World Bank has had a direct hand in shifting policy values and vision through their coordinating activities, with these activities becoming more common in the 1990s (Samoff, 1999). A first step in this process has been to work with country governments to define the "bigger picture" and the "policy and programmatic objectives" to which development aid from multiple funders will respond (Samoff, 2004, p. 399). In this way, the World Bank's view becomes a framework that guides the "master plan" for education and within which other donors function (Carney & Bista, 2009, p. 187). Nagel and Synder (1989) likewise highlight "the power of the World Bank to shape not only its own development but also to influence the course of development policy formulation in other agencies" (p. 10). Because the World Bank is often held in high esteem by other international aid agencies, which rely on it for guidance, data, and research, the World Bank plays coordinating roles that are both formal and informal in nature (Verger et al., 2014). A prime example is the Fast Track Initiative, set up in 2002 (and now known as the Global Partnership for Education).[19] Through this World Bank-managed initiative, countries with credible Poverty Reduction Strategy Papers—meaning those approved by either the World Bank or the International Monetary Fund—were eligible to receive $200 million in funding over three years to help make progress toward the achievement of the Education For All goals (Mundy, 2007). Though the funds are controlled and dispersed by the World Bank, they are raised through donations from country governments.[20] Borrowing governments are sensitive to aid coordination dynamics and are thus careful not to appear "uncooperative or

[19] See Birmingham (2011) for more on the history of this initiative.

[20] See Edwards et al. (2018) on the Fast Track Initiative, the World Bank, and UNESCO.

unapproachable" (Samoff, 1999, p. 264) for fear of damaging their reputation with the World Bank (or other development partners) who may spread an unflattering image.

International Events

The World Bank has often used its resources to highlight, communicate, sell, and ingrain a particular message about education through events such as international conferences/summits, seminars, workshops, colloquia, and study tours (Edwards, 2018a). Through such events, the World Bank is able to advance debates on "key policy issues" (Molla, 2014, p. 235) and is able to guarantee "rapid dissemination of … concepts" that are central to its preferred reforms (Alvarez, 1998, p. 36). Through its international events focused on education, the World Bank tends to draw attention to such topics as: "access, content, curriculum, efficiency, finance, inputs, knowledge, learning and quality, monitoring and evaluation, management, politics, systems, TVET, [and] teachers" (Boyd & Owens, 2015, p. 86).

As Heymenman (2003) explains, the World Bank is "the single largest source of development capital in the field of international education" (p. 315), and as a result, according to some, "it also is the only international body with enough capacity, power, and resources to co-ordinate global initiatives in the field of educational development" (Tarabini, 2009, p. 206). To that end, some of the more high-profile international events have been those through which the World Bank produced its Education Strategy 2020 document, titled "Learning for All" (Steiner-Khamsi, 2012). Verger et al. (2014) report that, in this process, "dozens of meetings were organized over the course of 14 months in 69 different countries" (p. 383). Interestingly, though the consultations were supposed to be a mechanism through which other actors provided feedback to the World Bank on their approach to education, participants also voiced the perspective that they thought the World Bank should have provided more prescriptive guidance

in the process (Verger et al., 2014). Decades of receiving advice from the World Bank has conditioned some actors in the development field to expect this guidance, and has made them feel uncomfortable when they perceive that this organization is not fulfilling its expected role.

Actor Recruitment and Deployment

The World Bank selectively recruits professionals from developed and borrower countries who they see as key players in helping the agency advance its agenda (Steiner-Khamsi, 2006). As Samoff (1993) notes, "the World Bank and other aid agencies have recruited, and will continue to employ and commission, particularly insightful, incisive, and accomplished scholars" (p. 220). Not surprisingly, those professionals often carry with them particular assumptions, frameworks, and expectations that align with those of the World Bank. At the same time, the World Bank can be a powerful socializing institution that is more resilient, more persistent, and more penetrating than its individual employees. Employees tend to share certain analytic orientations and core ideas about education and how it should be assessed**.** These orientations typically align with the neoliberal worldview of the organizations more generally.

It is important to note that socialization does not only happen when the World Bank hires national actors. It also happens through technical assistance, trainings, and publications dissemination—not to mention when the World Bank gives its staff leave time so that they can take up a position (i.e., be deployed) with a borrowing government to help implement the World Bank's agenda (Edwards, 2018a). But we should not give too much power to the World Bank, for as Hunter and Brown (2000) also note, the World Bank tends to attract engagement from those actors who already share this organization's interests and outlook. Where socialization does occur, it is not only national level actors who are influenced. Teachers and others in the education sector who participate in trainings are likewise susceptible (Hamano, 2008; Yang,

2010). In the case of China, which has remained more independent in its World Bank interactions compared to other countries, the World Bank has still been "significant in bringing in fresh, sophisticated education policy ideas and values, especially by inviting the participation of renown experts to be on international advisory panels and by appointing well-qualified international scholars to visit project universities" (Yang, 2010, p. 424).

Discussion

The World Bank is perhaps most famous for its use of conditionalities, which, in terms of Lukes' (2005) dimensions of power, reflect the first dimension of power. This is so in that conditionalities are agreed upon through formal decision-making processes (i.e., those associated with issuing loans) and represent the interests and preferences of the World Bank. Moreover, countries in dire straits financially may find themselves without the option of rejecting the conditionalities (i.e., required policies changes) attached to loan disbursements. Due to the large-scale mobilization by civil society in the 1980s and 1990s against the use of conditionalities and the structural adjustment programs with which they are associated, there is likely a widely-held perception that this pathway is the most prevalent or important. However, as discussed earlier, conditionalities were only the most commonly mentioned pathway in the literature during the last two decades of the 20th century. Since that time, other pathways have been more common, including loans themselves (see methods section for characterization of pathways by decade). Moreover, loans themselves—and other pathways related to them, such as technical assistance, required reports and administrative processes—are better conceived not as the first dimension of power but rather as the second and third dimensions. It is not (only) that decisions are made through formal processes but also that these processes (related to loans, technical assistance, etc.), having been developed and required by the World Bank, necessarily

steer the (stated) preferences of borrowers in a certain direction.[21] Only those reform avenues that have the chance of being entertained by the World Bank[22] are likely to be brought up by borrowers as options for funding with the World Bank. In this way, the institutional practices (or the "rules of the game") of the World Bank have an effect on the education reform agenda at the country level.

Processes related to the preparation of loans are cumbersome in nature, and the literature has reported that governmental counterparts have been surprised by the amount of red tape—i.e., the extent of micro-management and approvals required by the World Bank. It must be noted that borrowing countries typically work with multiple international development banks simultaneously, with the implication that the extent of influence to which countries are subject is

[21] There is an important issue which is beyond the scope of this paper, namely, the issue of stated versus "real" preferences. Borrowing governments may agree to pursue reform projects and objectives—as stated in World Bank loan documents—in order to secure access to financial resources even when the government is not interested in seeing the project implemented. There is evidence of this in countries such as Honduras (Morales-Ulloa & Moschetti, forthcoming), Indonesia (Edwards, 2023), and Mongolia (Steiner-Khamsi & Stolpe, 2004). See also Caravaca et al. (2022). As relates to this review, the larger point is that one should be careful when making claims about the ability of the World Bank to inform the "true" preferences of borrowing governments.

[22] Recall, as noted in the section on essential World Bank features, that this organization's approach to education is guided by human capital theory, as well as by its general (but not absolute) preference for market-oriented solutions.

greater than that which is exercised by the World Bank alone. Very few studies have addressed the experience and consequences for countries of having to work with multiple international organizations at the same time; this represents an area for future research.

The pathways of loan-related reports, technical assistance, and pilot projects are related in the sense that they can serve to lock-in agreed-upon reform strategies while also feeding into the development of the next set of projects. As such, it can be hard for borrowers to break the cycle, to create space to go in a different direction, especially in those contexts where governments lack technical and financial capacity. The difficulty of escaping the sphere of influence of the World Bank becomes more obvious when one considers the certifying role of this organization. Through this pathway, the World Bank signals to other international development partners that the strategies and actions taken by a borrowing government are seen as being appropriate and sufficient. Interestingly, this certification pathway, in addition to sending a positive reinforcement message to the borrower, also sends a message to other countries and to other international development organizations. This single pathway thus has multiple audiences, and it can serve to inform their preferences, thus connecting with Lukes's (2005) second dimension of power. One implication for borrowers is that they may be faced with a more unified set of preferences across international development organizations, who often hold shared beliefs about development, even if the specific projects supported by them target different aspects of the education system.

To appreciate the potential challenge described in the previous paragraph, recall that the World Bank, at times, also manages other organizations' funds in addition to coordinating processes (e.g., working groups, reform planning, knowledge dissemination, consultation and feedback events) in which a range of development stakeholders participate. One can thus see

how, theoretically speaking, coordination and the other pathways mentioned in the paragraph above (loan-related reports, technical assistance, pilot projects) connect to the terms of percolation, reverberation, and structural legitimation, proposed by Edwards (2013), to explain the way that organizations like the World Bank work at the intersection of the second and third of Lukes' (2005) dimensions of power. Here, percolation refers to the way that information introduced early in the policymaking process by international organizations tends to persist and to be a key point of reference "for defining educational problems, selecting among possible outcomes, and grounding the overall agenda" (p. 47). This is then complemented by reverberation, where "national level actors engage with the international level for assurance and/or further guidance with regard to the reforms that they are in the process of adopting or adapting" (p. 47). Third, the phenomenon of structural legitimation refers to the way that international actors facilitate legitimating events which "simultaneously tend to validate and ingrain both the participation and perspectives of international actors, particularly due to the reliance of those events on the research and/or knowledge products of international actors" (p. 48). Thus, the World Bank can, at times, influence which actors participate in, and which perspectives permeate, national education policy processes by facilitating and structuring the events and administrative tasks that make up such processes. However, the autonomy of borrowing governments should not be assumed away or uncritically discarded. Country counterparts can certainly resist the efforts of the World Bank towards agenda-setting through preference formation (second dimension of power) and the use of institutional practices to set the "rules of the game" (third dimension of power), though this ability is variable and depends on the political, economic, and technical position and capacities of the government in question.

Pathways associated with steering borrower preferences are not always (and are frequently not) connected with formal policymaking processes, but they are always made possible by the resources of the World Bank. This is a point that is insufficiently emphasized in the extant literature on the influence of international organizations. In the case of the research pathway, the World Bank can take advantage of its technical and financial resources to both commission or produce research and then to disseminate it widely—through digital means as well as through the pathway of international events. The World Bank is, of course, aware of its competitive advantage in this area. In an education strategy document produced in 2011, the World Bank highlighted its contribution to the "global knowledge base" on education by informing the reader, first, that it has produced ~1000 articles, books, book chapters, and working papers; second, that it had invested $49 million in research during 2001-2010 alone; and, third, that its production in the area of the economics of education compares favorably with top universities, among which "only Harvard comes close" (World Bank, 2011, p. 53). To be sure, through its knowledge production pathways (i.e., producing and disseminating research and more general publications) the World Bank is a purveyor and marketer of ideas. What is more, these pathways influence the discursive context of global education governance in which international organizations and national policymakers operate. These pathways thus have the potential to create favorable ideational dispositions (or preferences, in Lukes' [2005] terminology) among those governmental actors with whom the World Bank works as counterparts in the process of developing loan-funded projects.

However, it is not simply that the World Bank dedicates significant resources to knowledge production and the development of expertise, but also that other international organizations have reduced their budget for education research and specialists. This trend has the

effect of increasing the dependence on, or at least the centrality of, World Bank data, research, and dissemination strategies. And, as noted in the prior discussion of the pathway of actor recruitment and deployment, in addition to providing knowledge products, it may also provide or attract human capital. Indeed, the World Bank may hire as consultants or staff key actors from borrowing countries, individuals who, for example, may have been affiliated with the implementation of a program that has become very successful (as happened in the case of El Salvador after the high-profile success of the community-based management project). Perhaps less well-known is that the World Bank has given time off to some of its staff so that they can take up key positions within borrowing governments, in order to ensure that the correct measures are taken. In these ways, the World Bank brings on board national actors who can help the World Bank advance its reform agenda in other countries while, on the other hand, sending its own staff to the national level to provide technical assistance and, at the same time, socialize others within the borrowing government to the World Bank's way of seeing and doing things. It should be noted, however, that the experience and effects of this pathway are not well documented (even though our literature analysis showed that this pathway was found in 17-31% of literature in the decades from the 1980s onwards) and, as such, they represent an avenue for future research.

Stepping back, what is impressive about the World Bank is the extent to which its pathways of influence encompass each of Lukes' (2005) views of power. The World Bank, in other words, is a privileged organization that can, when the circumstance are right, exercise incredible influence over the countries with which it works. At the same time, the findings in this article suggest that it is important to complement Lukes' (2005) theorization of power with additional conceptualizations or typologies for how power manifests in practice. As has been seen in this article, Lukes' (2005) dimensions hold theoretical purchase at a level of abstraction

that is useful for identifying the ways that power can function generally. And Lukes' (2005) theorization certainly represents an advance over his predecessors, who were not attentive, for example, to the ways that controlling the rules of a political game constitutes a form of power. However, Lukes' (2005) concepts are limited in their ability to identify and differentiate among the variety of practices through which organizations such as the World Bank exercise their influence. Not only has the framework of pathways of influence helped to provide this level of conceptual specificity, but it has also shown that certain practices can contribute simultaneously to multiple of Lukes' (2005) dimensions.

Conclusions

The present article has sought to make a contribution to the literature on the influence of the World Bank, one of the most influential actors operating in the global education policy space. The focus was on understanding the influence of this organization in relation to policy formation. Notably, the findings of this review have implications that go beyond a discussion of pathways of influence. Here, we refer to the fact that much of the literature on the World Bank, as noted in the methods section, fails to address or to clarify the theoretical and methodological approaches employed to arrive at the findings shared. Theory was addressed in 54% of studies retained while only 44% clearly specified their methods. This is not to suggest that the literature reviewed here was not empirical, only that the process of data collection and analysis was not made clear in some cases. One implication of this observation is that the insights highlighted here should be complemented by further research in order to substantiate their generalizability.

While many authors, such as those cited in the introduction, suggest that the World Bank has, at least since the 1980s, been one of the most dominant actors in the field of education globally, this organization is facing changing dynamics when it comes to the global governance

of education. This is particularly so as other organizations—such as the OECD, which is famous for its international tests that compare student abilities across countries—gain in prominence (Mundy & Verger, 2015). However, although the OECD may offer advice like the World Bank, and although it has made in-roads in terms of implementing its tests in low-income countries, it is important to note that the OECD is not a lending organization. Indeed, no other organization comes close to the financial support offered by the World Bank. Thus, in terms of the provision of development finance to low- and middle-income countries, the World Bank is likely to remain an influential actor for the foreseeable future. The present article has sought to make a contribution by clarifying the different pathways through which that influence can manifest.

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Note: All those references with an asterisk were included in the systematic review.

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Table 1
Theoretical Orientation to the World Bank

Theoretical approach	Description	# (%)
1. World Society Theory	Focus on the World Bank as an organization that carries and disseminates cultural values voluntarily adopted by policymakers around the world.	1 (1.43)
2. Political economy	Focus on how the World Bank contributes to the political and economic structures that constrain policymaking options and processes at country level	24 (34.29)
3. Critical Discourse Analysis	Focus on World Bank knowledge development while taking into account material and discursive nature of relations of power	7 (10.0)
4. Post-structuralist	Focus on production and influence of World Bank discourse	2 (2.86)
5. Global governance	Focus on involvement of a variety of international organizations in processes of policymaking and implementation	30 (42.86)
6. Policy borrowing	Focus predominantly on borrowing, transfer, and/or adaptation dynamics of policies supported by the World Bank	3 (4.29)
7. Apolitical policy implementation	Focus on evaluating the effects in practice of World Bank-supported policies	2 (2.86)
8. Organizational sociology	Focus on understanding internal dynamics of the World Bank as an organization	1 (1.43)
Total		**70 (100)**

Table 2
Methodological Approaches Reflected in the Retained Literature

Methodological Approach	Description of Label	# (%)
Various Qualitative	Label applied to studies that are based on a combination of typical qualitative strategies (e.g., interviews, document analysis) and which do not include other descriptors for their approach	6 (8.57)
Case Study	Label applied for publications that either (a) explicitly state their method as case study or (b) are a case study in form	22 (31.43)
Policy Analysis	Label applied to studies that analyze policies remotely, based on secondary data or (critical) interpretation	10 (14.29)
(Critical) Discourse Analysis	Label applied to studies that state or employ (critical) discourse analysis as their method	4 (5.71)
Document Analysis	Label applied to studies that are based exclusively on document analysis	20 (28.57)
First-hand Account	Label applied to studies based on first-hand participation by the author(s)	6 (8.57)
Quantitative	Label applied to studies based on quantitative methods	1 (1.43)
Mixed Methods	Label applied to studies that employed both qualitative and quantitative methods	1 (1.43)
Total		**70 (100)**

Table 3
Occurrence of Pathways of Influence in Literature Sample, in Descending Order

Pathway of Influence	#	%
1. Loans/funding	51	72.86%
2. Research studies	28	40.00%
3. General publications	28	40.00%
4. International events	27	38.57%
5. Conditionalities	27	38.57%
6. Technical assistance	25	35.71%
7. Loan-related reports & studies	22	31.43%
8. Certification/ certifying role	18	25.71%
9. Coordination of foreign aid	16	22.86%
10. Actor recruitment and deployment	11	15.71%
11. Pilot projects	11	15.71%

Note: Publications coded according to all those forms of influence documented therein.

1. Loans: The provision of financial assistance by the World Bank to borrowing governments to fund reforms with which the World Bank agrees.

2. Conditionalities: Those conditions attached to the approval or disbursement of loans. Loans unrelated to education may include requirements for education sector reform; conversely, education sector loans may require actions beyond this sector.

3. Pilot projects: Small-scale projects or programs that test an innovative approach. These may be supported by the World Bank or other organizations. If deemed successful, the World Bank may provide loans and technical assistance to scale it up. Pilot programs can be the first step in a long process of entrenching the World Bank's preferred approaches to education reform.

4. Advice and recommendations (technical assistance): World Bank representatives provide guidance to borrowers on what they should do, when, and how. This advice carries weight, particularly when associated with World Bank loans.

5. Loan-related reports and studies: Loans are enmeshed in a web of documents that include, for example, early studies, pre-appraisals, sector analyses, public expenditure review, implementation and management reports, and evaluations, etc. These reports specify what has been done, what has yet to be done, and what should be done. Ignoring the content of these reports can compromise loan eligibility.

6. Research: The numerous studies conducted by the World Bank are influential when it comes to establishing reform priorities around the world. The technical, rational, and objective appearance of the research lends credibility to the findings. Commissioned studies can guide education policy by providing findings that justify certain policies.

7. General publications: The World Bank's publications include small reports on individual projects, analyses of aid and its consequences, and periodic reports on the state of the world.

One of the most influential is the annual *World Development Report*, not to mention the journals produced by the World Bank, such as the *World Bank Research Observer* and the *World Bank Economic Review*, with the first of these designated as "enjoy[ing] the largest circulation of any economic title" (World Bank, 2016). These publications have become a global reference point not only for information but also for analyses of relevant problems and potential solutions.

8. Certifying role: The approval of the World Bank indicates to other development partners that a national government is taking appropriate steps towards reform in a satisfactory fashion, and that it can therefore be trusted with additional financing.

9. Coordination of foreign aid: The World Bank often facilitates dialogue among international organizations and with government agencies, in addition to overseeing the provision and use of other agencies' funds—making it the primary point of reference for how to organize and manage development assistance.

10. International events: The World Bank has often used its resources to highlight, communicate, sell, and ingrain a particular message about education through events such as international conferences/summits, seminars, workshops, colloquia, and study tours.

11. Actor recruitment and deployment: The World Bank selectively recruits and attracts professionals from high-income and borrower countries who can help the agency advance its agenda. While these professionals often carry with them particular assumptions, frameworks, and expectations that align with those of the World Bank, the World Bank can also be a powerful socializing institution through its professional norms and its organizational incentives.

Figure 1. Pathways of World Bank Influence in Educational Assistance
Source: Derived and expanded from the work of Dale (1999) and Samoff (2009); revised from Edwards and Storen (2017b).

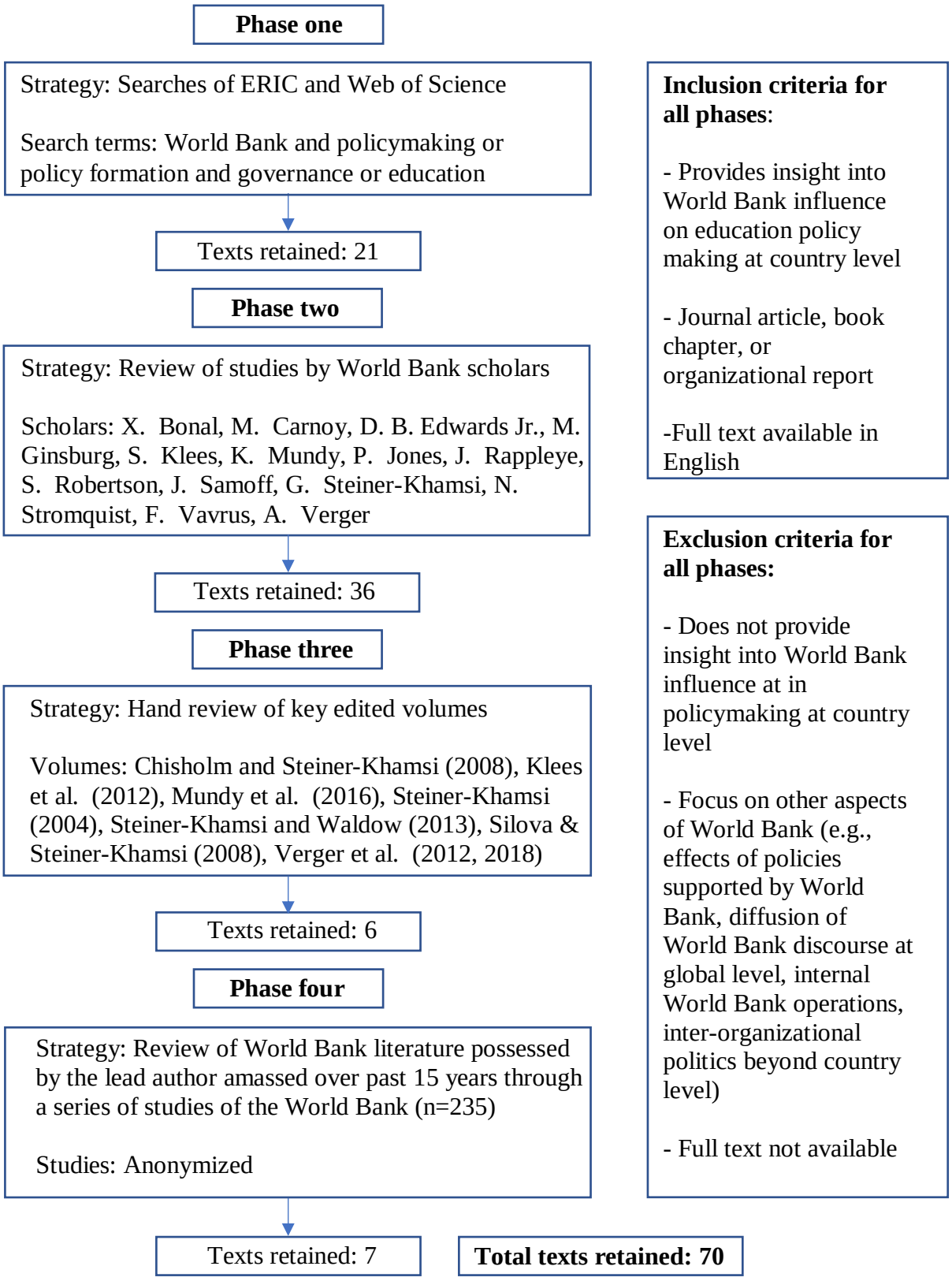

Figure 2. Literature search phases and selection criteria