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World Bank Influence on Policy Implementation in Education: A Systematic Review

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Abstract: This systematic literature review identifies the modes of the World Bank's participation in the implementation of education policies and analyzes the factors that contribute to a lack of implementation fidelity. The results show how the World Bank's participation takes multiple forms, including policy design and the use of conditionalities, the provision of technical assistance, and the evaluation of implemented policies or programs. Factors identified that contribute to the emergence of implementation infidelity include the existence of government personnel beyond the control of the World Bank and contextual insensitivity in project design. Results are analyzed and discussed using the 'global-local conditions of possibility' approach from policy sociology.

Keywords: World Bank, policy implementation, education, international organizations, global governance, globalization

Introduction

The World Bank has been one of the most influential non-state actors in the field of education for decades, both in terms of financing and in the generation of knowledge in the realm of global education policy. Past research on this organization's influence has focused, for example, on how it produces discourse strategically in order to advance its agenda (Vavrus & Kwauk, 2007). Other studies have examined how the World Bank exerts its influence by taking advantage of its financial resources and its ability to generate policy-relevant knowledge—that is, knowledge that steers decision-making at the national level (Steiner-Khamsi, 2009). Yet other studies center on how the World Bank promotes an ideologically driven vision of what kinds of reform are necessary on a global scale (Verger, Edwards, & Altinyekan 2014). These analyses often raise concerns about geopolitical dynamics, the imposition of loan conditions, and the methods of consensus-building that influence policies at the national level (Klees, Samoff, & Stromquist 2012; Mundy 2002; Steiner-Khamsi 2012; Verger 2012).

However, despite the high volume of literature and debate surrounding the organization, there has been a lack of a systematic discussion about the influence of the World Bank in the field of comparative and international education. In order to address part of this gap, two authors of the present paper (together with a group of colleagues) recently analysed 70 publications that shed light on the ways in which this international entity contributes to developing education policies—ultimately identifying multiple pathways of influence related specifically to policy formation (Authors).¹ But the focus

¹ The pathways of influence include: (a) the provision of financial assistance through project loans aligned with the World Bank's interests; (b) various conditionalities linked to these loans; (c) support for pilot programs, both their own and those of other organizations; (d) technical assistance through advice and recommendations; (e) studies and reports associated with programs, the non-consideration of which can

on policy making leaves unaddressed the issue of World Bank influence in policy implementation, an area where there has tended to be less literature. While previous studies, such as those by Samoff (1993), Steiner-Khamisi and Stople (2004), Edwards et al. (2015), and Ginsburg et al. (2010), have offered in-depth examinations of policy implementation in specific countries—Egypt, Mongolia, El Salvador, and Egypt, respectively—this area remains relatively understudied. At the same time, the aforementioned studies offer important insights that underscore the existence of significant discrepancies between how the World Bank conceptualizes or envisions reform, on one hand, and then the local realities of reform implementation, on the other hand. Our perspective is that these studies reveal interesting and important dynamics that merit further attention.

With the above in mind, this paper makes a contribution by locating and looking across existing studies in order to systematize the ways that the World Bank has been able—and unable—to influence the implementation of policies and programs that it supports. In other words, this paper presents the results of a systematic literature review of 43 studies related to the World Bank’s participation in the implementation of education policies. This review revealed—both—the practices through which this organization has been able to steer policy implementation as well as the factors that prevent the World Bank from realizing its reform vision.²

Before proceeding further, it should be noted that, in this paper, we follow Bartlett and Vavrus (2013) in our understanding of implementation. For these authors, implementation is the process by which “social actors interpret and selectively implement policies, adapting ideas and discourses developed elsewhere ... according to their own interests, as well as symbolic, material, and institutional limitations” (p. 132). Crucially, the term ‘policy implementation’ also encompasses the implementation of World Bank projects. This way of understanding policy is appropriate because World Bank projects are necessarily endorsed by, and agreed upon together with, the countries with which the World Bank works. The implication is that World Bank projects at the country level are, indeed, a form of government policy.

The structure of this paper is as follows: first, we present the theoretical-analytical approach. Second, we discuss the methods employed. The third section centers on the

jeopardize the eligibility of recipient countries for future loans; (f) the numerous studies conducted by the organization, which legitimize and establish global reform priorities; (g) the World Bank’s general publications, which serve as a global reference for both information and analysis of relevant issues and potential solutions; (h) its role as a certifier of good government performance, as other actors legitimize the World Bank in this regard; (i) the coordination of external aid, as the entity has more capacity than most cooperation organizations; (j) the organization of international events (e.g., conferences, seminars, colloquia, etc.) to communicate a specific message about education; and, finally, (k) the recruitment and socialization of professionals from both recipient and developed countries, which allows the World Bank to advance its interests or priorities (Authors).

² The study on which this article is based was funded by UNESCO, and some of the language here comes from the report that served as a background paper for the 2021 Global Education Monitoring Report (see Authors).

results of the literature review. This section is divided into two subsections: the first one will identify the modes of influence of the financial institution when it comes to the implementation of education policies, and then, in the second subsection, we will explore the reasons for which World Bank projects do not go as planned. The concluding section offers final remarks.

Theoretical-analytical Approach

In this article, we take a policy sociology approach (Ball, 1990, 1997; Ozga, 2019, 2021). In the context of global-local relations and influences on and around education policy, policy sociology allows us to focus on the “dynamics of global policy interpretation and translations, and [to] situate these dynamics within the political and technical disputes that the reception of external models generates among local constituencies” (Verger, Fontdevila, & Zancajo, 2016, pp. 18-19). Specifically, we draw on a policy sociology approach labeled as “global-local conditions of possibility” (Rhoten, 2000). Central to this approach is that, when it comes to international organizations, it includes but goes beyond a focus on their influence of international organizations in the formulation of national education policies. Moreover, and importantly, it does not assume that the ‘global’ and the ‘local’ are separate but rather understands them as ‘interactions’ through which policy is produced. We note, however, that these global-local interactions do not imply a top-down relationship where policy ideas are assumed to originate exclusively from international actors. Rather, this approach conceives of policy “as a complex series of changes that operate at several interacting levels, within several interrelated contexts, and along several interconnected dimensions” (Rhoten, 2000, p. 597).

In order to understand these interactions and their effects, four dimensions must be considered: policy origins and intentions, policy contexts, policy interpretations, and policy actions. The first dimension, policy origins and intentions, is related to the exploration of the pressures of international policy actors, as well as the history, content, and discourse of related national reforms. The dimension of policy context focuses on the examination of national governments’ historical relations with international organizations, as well as the effect of current political-economy conditions on these relationships. The third dimension, policy interpretations, relates to the mapping of key education actors, their roles and responsibilities, as well as the meanings they assign to the reforms in question. Finally, policy actions revolve around the investigation of how actors react to and enact the reforms in question with attention to the ways that the latter (enactment is shaped by material (technical, financial) resources and cultural assumptions).

In the present paper, the ‘global-local conditions or possibility’ approach is the lens through which we analyze and discuss the studies retained in our review of the literature. See Table 1 for a summary of the four dimensions. The next section further addresses how this framework guided our study.

Methods

This article presents on a systematic literature review of the ways in which the World Bank influences the implementation of education policies and the challenges encountered during implementation. The literature review was conducted using different combinations of keywords intended to capture studies on the World Bank's work in relation to education reform. Two databases were searched: ERIC and Web of Science.³ From an initial selection of 297 documents, the results were refined through multiple rounds of review, initially based on the relevance of titles and abstracts to the topic, and later on the analysis of complete publications. The inclusion criteria include (a) that the document provided insight into World Bank influence on education policy implementation at the country level; (b) that the document was a journal article or a book chapter; and that (c) there was a full text available in English.⁴ When any of these criteria was not met the study was excluded. These multiple rounds of review ultimately led to the retention of 43 studies (for more information on the methods, see Author et al., 2021).⁵

With respect to the geographical focus of the documents (N=43), 28% examine Latin America and the Caribbean, another 28% examine Sub-Saharan Africa, while 21% examine the Middle East and North Africa. The regions of East Asia and the Pacific (12%), Europe and Central Asia (12%), and South Asia (9%) represent smaller percentages of the studies.⁶ In terms of the temporal focus, policy implementation during the 1990s and 2000s (74% and 70%, respectively) is the most studied. The 2010s and 1980s are included in 33% of the documents, and the 1970s and 1960s to a lesser extent (16% and 7%, respectively).⁷ Finally, regarding the main focus of the documents, only 33% explicitly focus on the implementation of a World Bank program or policy; the rest of the studies retained provide insights on policy implementation as a secondary focus.

Regarding the analytic process, an inductive approach was followed to identify both the modes of the World Bank's participation in policy implementation and those factors that cause policies and programs supported by the World Bank to be implemented in a way that inhibited implementation fidelity. It is important to note that this paper does not focus on evaluating the impact of World Bank policies in terms of (cost-)efficiency or effectiveness, nor is it a comprehensive review of all the literature on the organization.

³ The first author also reviewed their personal library for relevant studies. This step was taken so that the review could benefit from literature not found in online databases, that is, literature that the first author has accumulated over the past 15 years of research on the World Bank. See the methods section of Author et al. (2023) for more.

⁴ The review focused on English-language sources because English is the working language of the research team, which facilitated analysis and collaboration. Additionally, the majority of global publications on the World Bank's policies are widely available in English.

⁵ For a complete list of studies retained in the final literature sample, see the reference list. Not all selected studies will be cited in the results section of the paper, but only those that more clearly help demonstrate observed trends.

⁶ The percentages included in this section do not add up to 100% because some articles focus on more than one country/region and more than one decade.

⁷ Note that the percentages for temporal focus sum to more than 100% because some studies correspond with more than one time period.

Rather, as noted, it is a review of the nature and limitations of this financial institution when it comes to affecting how policies and programs are put into practice.

As also mentioned, the process of analysis was informed by the “global-local conditions of possibility” approach (Rhoten, 2000). This lens was useful to understand the interconnected nature of the global—i.e., the World Bank—and the local—i.e., the governments and other implementation actors—as well as to comprehend the factors and dynamics in recipient countries that function as obstacles or facilitators of the enactment of World Bank policies into practice. To be clear, the analytic lens provided by Rhoten was used to interpret and discuss the themes identified inductively (described above). This sequencing of steps is reflected in the structure of this article. First, the findings section presents the themes generated through a review of the retained studies; second, the discussion section looks anew at these themes in relation to Rhoten’s framework in order to offer commentary.

It bears mentioning that our usage of an explicit framework for analysis contrasts with the majority of studies on the World Bank’s influence on policy implementation: only 46.5% of the retained studies explicitly state their theoretical approach. While this does not mean that the remaining 53.5% of the studies do not reflect one or another theoretical perspective, it does mean that their approach was not clearly stated. Table 2 reflects the categorization of orientations found in our literature sample. As can be seen, the overwhelming majority of studies are grounded in perspectives that reflect either a global governance orientation or a political economy orientation.

Table 3 summarizes the methodological approaches in the literature. As can be seen, qualitative approaches dominate. Only two studies (4.8%) included quantitative methods. The most prevalent qualitative methods were case study (33.3%), document analysis (21.4%), policy analysis based on secondary information (14.29%), and firsthand accounts (11.9%). Given that the studies in our sample took as their focus the process of policy implementation, and not only numeric outcomes, it is to be expected that they would rely heavily on qualitative methods.

The World Bank’s Influence on Education Policy Implementation

A systematic literature review allows us to see how the influence of the World Bank on the implementation of education policies is heterogeneous and takes multiple forms. The World Bank plays an active role in the implementation of education policies throughout the whole process of implementation, albeit in diverse ways. Illustratively, this section covers three ways in which the World Bank influences implementation: through the design of policies and the use of conditionalities, through technical assistance, and through the evaluation of implementation.⁸ Although the examples given are not

⁸ These forms of influence can generally be understood as corresponding to the pre-execution, execution, and post-execution phases. However, far from a linear and simplistic conception of policies, it is important to consider that, in many cases, projects consist of more than one execution phase. In other words, there

exhaustive, they are useful to illuminate how these pathways of influence operate and to add complexity to the way implementation is understood.

Designing Implementation

Based on the retained articles in this study, the literature shows that the World Bank influences implementation from the very first moment—even before what we normally conceive of as implementation, i.e., the enactment of education policies. In other words, the first way in which the World Bank influences implementation is related to the process of policymaking: it affects implementation by influencing the design of the policies that are to be put into practice. While the ways in which the World Bank influences education policymaking—or the pathways of influence in policymaking—are diverse (Author et al., 2023), here we illustrate the connection between policymaking and policy implementation drawing on examples from the literature. In fact, in most of the cases identified in the literature review, the influence of the World Bank on policy implementation occurs precisely at this moment, through the design of specific programs or policies which are implemented solely by the state—without the explicit (or visible) participation of the World Bank in later enactment phases. That is, while the implementation itself is carried out by the state, in Rhoten's (2000) terms, the policy origins and intentions can be seen, at least partially, as stemming from the World Bank.

An example can be found in the study by Espinoza (2017), which refers to the MECESUP program (Program for Education Quality and Equity Improvement) in Chile, which has been implemented by the Ministry of Education without the participation of the World Bank, although this institution did contribute to its design. Through this program, the World Bank, together with the Chilean Ministry of Education, intended to introduce market logics to the higher education sector, such as competition between universities, economic incentives connected to universities' productivity, a marked-related curriculum, or allowing profit in state universities (Espinoza, 2017).

Other examples similarly highlight how the World Bank influences local policies through setting conditions and program recommendations that come with loan allocations. States respond to these more or less required forms of guidance to decide which policies they want to pursue. Often, states tend to focus on policies which are in line with the agenda and priorities of the World Bank in order to get the loans, as a number of authors have documented (Bernasconi, 2007; Bonal, 2002; Edwards, Victoria Libreros, & Martin, 2015; Ginsburg, Megahed, Elmeski, & Tanaka, 2010; Madden, 2014). In this vein, exploring the Salvadoran case, Edwards (2015) states:

[The] World Bank designed a new organizational structure for the MINED [Ministry of Education] and attached conditionalities to the disbursement of loan tranches that would strengthen the foundation of the program (Edwards, 2013a).

can be conditions for different phases of a project that must be met before receiving the next instalment of the loan. Therefore, the distinction between, e.g., the pre-execution phase and the actual execution phase is more complex in practice.

These conditionalities were that the MINED increase its funding to education in the coming years (enabling it to fund EDUCO's expansion) and that it create unambiguous legal footing (through presidential decree) for parents to have the ability to hire and fire teachers. In these ways, ... the World Bank helped to ensure that this model was scaled up across the country and became deeply entrenched in the Salvadoran education system—as opposed to remaining a fringe and short-term program without much impact. (p. 422)

Similar to the Salvadoran case, Mukhopadhyay and Sriprakash (2011) affirm that there are programs that are being executed in India by the government “because of spending mandates by external agencies such as the World Bank” (p. 320). Thus, although the Indian state is the main implementer of these programs, there are indications that they have been influenced by World Bank requirements.

This means that, at the implementation phase, the World Bank is typically not the implementor of policies; it is rather the state that put policies into practice. Still, as we have seen, the execution occurs in ways influenced by the World Bank. Therefore, one of the main ways in which the financial institution influences education policy implementation happens even before the programs or policies are put into practice: by shaping the terms of reference and setting the boundaries and conditions of what is to be executed. In Rhoten's (2000) terms, the policy origins and intentions of these programs can, at least partially, be traced back to the World Bank, whose objectives and priorities shape the design of national reforms. Importantly, this does not imply, as we will discuss, that countries implement the World Bank's priorities uncritically, nor that all policies necessarily originate from the Bank. On the contrary, states maintain significant autonomy and agency in generating policy ideas, and, in some cases, it has been shown that the World Bank responds to policy requests initiated by a specific state. This dynamic has been well documented in the literature (e.g., Mundy & Verger, 2015; Fontdevila & Verger, 2015), which has also highlighted the tensions that can emerge between national agendas and the Bank's espoused policy preferences.

Influence via Technical Assistance

In other cases, the influence of the World Bank on implementation does not end with design. The literature also highlights cases in which the World Bank exerts direct influence during the execution of policies, mostly by providing technical assistance to recipient countries.⁹ It is worth mentioning that these two pathways of influence are non-exclusive and often complementary.

One of the most illustrative examples in this regard can be found in the study by Smith (2008) in South Africa, which explores the complexity and the variety of strategies used by the World Bank to provide the South African State with technical assistance. The number of programs that, from a historical perspective, have been financed by the World

⁹ Technical assistance can also be provided during the project design.

Bank and implemented through the mentorship of World Bank ‘experts’ in the country is considerable. The variety of forms of participation related to technical assistance can be summarized in four categories in Smith’s (2008) case:

(1) continuing the access to experience of local government reform; (2) the provision of municipal financial management specialists for municipalities to provide long-term advisory support to municipal reforms; (3) the provision of various international experts to assist in policy reform processes and the implementation of monitoring and evaluation systems; and (4) leveraging additional support from the donor community. (p. 248)

Elsewhere, Terzian (2016) analyzes the case of the Educational Quality and Relevance Project (EQR) in Armenia. After a first program financed by the World Bank, named Education Financing and Management Reform Program (1998–2002),

in 2004, the Armenian Ministry of Education and Science (MOES) applied for a second World Bank loan to begin the second stage of reform (...). This second group of loans assisted the MOES with its implementation of national curriculum, assessment procedures, and training teachers in updated instructional practices. (Terzian, 2016, p.281)

In this project, a special unit, called the Project Implementation Unit (PIU) was established in order to oversee the implementation of the EQR. According to a high-level official in World Bank education programs:

The PIU under the regulations of the Ministry and World Bank, but is a World Bank-funded department that focuses on implementing World Bank programs such as the Educational and Quality Relevance Project. The main mission is to oversee the project’s implementation. The Ministry of Education and Science is in charge of defining strategies ... The PIU drafts ideas and then receives government approval. The MOES and the PIU work together closely (Terzian, 2016, p. 282).

This strong collaboration between the World Bank and the Armenian State, through the creation of a specific implementation unit, is a clear example of the contribution of the World Bank in the process of policy implementation. Although this example zeroes in on the experience of Armenia, it should be noted that it is common for the World Bank to work with government counterparts through a PIU, in order to ensure as much influence and support as possible in the process of project implementation. This strategy goes hand-in-hand with the frequent requirement that the World Bank approve of the project staff hired by the government. Other studies have discussed collaboration through PIUs, including on El Salvador (see Edwards, Victoria, & Martin, 2015), Afghanistan (see Evans & Barakat, 2012) and Mozambique (see Takala, 1998), among

others. In Rhoten's (2000) terminology, through technical assistance, the World Bank also influences the implementation process by shaping policy actions (Rhoten, 2000).

Influence via the Evaluation of Policy Implementation

We have shown how the World Bank influences implementation both through the design of education policies and programs and through technical assistance during execution. However, the literature review also reveals a third pathway of influence: the evaluation of programs and policies. In other words, the literature underscores how the World Bank conducts evaluations of project-related activities, which often serve as a mechanism to guide, adjust, and reshape the implementation process (Steiner-Khamsi & Stolpe, 2004). These evaluations are not merely retrospective but are frequently integrated into the broader framework of implementation, providing feedback that influences subsequent decisions and actions. This can be observed in the following two illustrative examples.

The case of Egypt, studied by Ginsburg, Megahed, Elmeski, and Tanaka (2010), stands out. Here, the World Bank conducted several evaluations during the process of implementation of those policies funded by the institution. These evaluations were intended to give feedback to the government, to influence continued implementation. The fact that compliance with the evaluation recommendations was tied to continued loan funding ensured governmental cooperation (at least to an extent, as further discussed in the next section). Interestingly, these evaluations do not only assess the implementation of the project but also the governmental officials and consultants who are charged with doing the implementing.

The second example—from the context of India—connects with the first. There, a World Bank evaluation of the District Primary Education Project found that “‘very competent officials’ were placed in charge of the program and that the level of state commitment in India had ‘far exceed[ed] the levels usually seen in other low-income countries’” (Abadzi, 2002, p. 5, in Mangla, 2018, p. 389). Given that World Bank funding can require approval by this organization for key project staff, the findings of such evaluations can be particularly influential. They effectively signal that the government counterparts are doing a good job and should continue to proceed as they have.

Lack of Implementation Fidelity

Up to this point we have analyzed the three main pathways of influence of the World Bank on education policy implementation: through the design of policies and programmes, through technical assistance, and through evaluation. As we discuss in this section, the literature reviewed also shows that it is common for policies and projects supported by the World Bank not to reflect the intentions or descriptions included in official documentation. In this section, we focus on this issue, as well as some of the circumstances and factors that act as barriers to, or facilitators of, the implementation of World Bank programs.

Government Personnel beyond the Control of the World Bank

First of all, it is worth noting that available research rarely indicates whether the implementation process of policies or their results correspond to the expectations made by the World Bank and the government when designing the project. Moura Castro (2002) comments on this reality in addition to highlighting issues that can affect project formulation and implementation:

The real problem lies in the implementation phase. Past experience has taught international development banks some very humbling lessons. First, everything can go wrong—and things do go wrong. Banks usually do not disclose their failures in the implementation phase. Some projects die at the preparatory level, due to the incapacity of the country teams to respond to information requests or due to fundamental disagreements about the project's design. A few are approved but are never disbursed, due to legal unexpected events or bureaucratic inertia. Most loans are disbursed, but more slowly than anticipated. In fact, very few loans are completed according to the originally planned schedule. A significant proportion gets stuck somewhere in the process for a variety of different reasons, with the largest being delays in counterpart funding. While the Banks neither disseminate nor collect reliable statistics on which projects fall victim to each of these problems, the great majority of projects eventually disburse all funds and reach completion. The failure rate, measured as the non-disbursement of the entire loan amount, is relatively low (p. 394).

These challenges inevitably arise because the World Bank, despite the forms of influence available to it, must cooperate with a range of government counterparts whom it cannot control. These counterparts often face a diversity of pressures, demands, and incentives—or else simply have different priorities—which can lead to projects being delayed or derailed.

One should also consider that, at the implementation phase, projects might meet active resistance that can come from the agents working in the system or even from the system structure itself—an insight which directly connects to the dimensions of policy context, policy interpretations and policy actions outlined by Rhoten (2000). In South Africa, for example, there was resistance from the government to take out loans in the period 1997-1999, which generated frustration among World Bank officials (Smith, 2008). In the same vein, Levačić (2014) states the reluctance of the Bulgarian Ministry of Education to implement World Bank policies. This might happen because Ministers and high-ranking politicians have a preference—rooted in their desire to be re-elected—for projects which bring visible improvements in the short run rather than for the implementation of strategies that require longer time horizons to show effects. Similarly, in Moldova,

Despite World Bank pressure to increase efficiency [in the education system], the current government (as of 2013) was concerned about the impact that school closures [recommended by the World Bank] would have on its popularity with

voters and is considering how to remedy the situation by revising the formula [that determines both education transfers from central government to elected local governments and, with minor variations, school budgets]. Thus, in Moldova, one can see the initial top-down model of policy implementation may well be modified due to intermediation with local-level interests (Levačić, 2014, p. 350).

Similar findings have been shown in the context of Brazil. Here, project implementation was complicated due to the highly bureaucratic system of government and the fact that “administrative personnel [were] susceptible to clientelist appeals and other lobbying efforts” (Hunter & Brown, 2000, p. 132). In response to increased influence from the World Bank after the Asian Financial Crisis, Indonesia aimed to assert its independence by relying less on external funding. To protect its sovereignty and credibility, the government gradually reduced its dependence on World Bank financing while increasing domestic contributions. This strategic move aimed to preserve national autonomy and deflect perceptions of over-reliance on international aid, allowing Indonesia to assert greater control over its developmental trajectory, though it should be noted that the Government of Indonesia continued to rely on World Bank technical assistance (Edwards & Storen, 2017).

In addition to technocratic capacity, the degree of country commitment has also been highlighted as one of the main factors for explaining success of project completion since at least the 1980s (McCourt, 2018). McCourt (2018) writes: “A ... World Bank study found that ‘ownership’ explained overall programme outcomes in no fewer than 73% of 81 World Bank operations completed in the 1980s” (McCourt, 2018, p. 651). For these reasons, the World Bank has emphasized the importance of local decision-making and the need to take into account a country’s political and institutional characteristics when addressing reform needs. To this end, Evans and Barakat (2012) underscore the following: “evidence suggests that external sources of policy change are rarely successful unless locally articulated as the path to development. Hence the key to rational and legitimate policy transfer is ownership by local communities” (p. 543). Nevertheless, what stands out is the contradiction between this recognition and the practices documented previously in relation to the process of preparing and disbursing loans, which, as noted, can highly circumscribe the options available to borrowers.

As a final example, the case of El Salvador illustrates how international recognition and support can enhance national commitment to development initiatives. Despite initial doubts, international organizations such as the Inter-American Development Bank and UNESCO ultimately supported and promoted a particular World Bank program (related to community-based management of education) as a model for improving educational access. Acclaim given to the program by the World Bank prompted consistent support from other donors and international organizations, reinforcing domestic political commitment. The resulting positive feedback loop facilitated sizable funding and increased international interest, solidifying, in turn, the country’s dedication to the program—at least until a left-wing president was elected who

disagreed with the program's principles and practices, rooted in punitive teacher accountability without appropriate teacher or community support (Edwards et al., 2015).

Contextual Insensitivity

World Bank studies and programs do not always consider contextual dynamics, which can hamper implementation. As Samoff (1999) notes:

In practice, policy directions and reforms recommended in sector studies, albeit ostensibly potentially effective, are often implemented partially, inconsistently, or not at all. One reason is that externally-initiated sector studies, notwithstanding what may seem to be technically sound analyses, generally pay insufficient attention to national contexts and fail to assess the institutional, political, and socioeconomic feasibility of their policy recommendations. (p. 263)

To this end, it is not unusual for World Bank reports to rely on generalizations or assumptions that do not consider the variation in local context across countries (Smith, 2008). An absence of key local stakeholders in the design of the policy might also have a negative influence on policy implementation, as in the case of a higher education policy in Ethiopia (Molla, 2014). An illustrative example of this can be seen in the case of the introduction of the African Virtual University Project in the Kenyan context, starting in 1997 (Nafukho & Muyia, 2013). Firstly, the policy did not consider the lack of training by the Kenyan university community in the use of ICT, which was of high relevance to the project. Secondly, although the project provided all the necessary equipment for implementation, “the telecommunication infrastructure in Kenya was very limited. Besides lack of the necessary ICT infrastructure, the cost of telephone, software and Internet was initially very high” (p. 654). Of course, these conditions gave rise to a variety of challenges, which impeded the progress of the project.

Another example that shows the World Bank's contextual unawareness can be found in the implementation, in 2010, of a policy targeting the higher education sub-sector in Cambodia: the Higher Education Quality and Capacity Improvement Project (hereafter HEQCIP) (Rappleye & Un, 2018). One of its 4 components (number 2)

was unique, both in the sense of having few precedents in other education sub-sectors and in other aid-dependent contexts globally. Component 2 would provide research grants up to USD 200,000 directly to Cambodian universities (called Higher Education Institutions ... in World Bank nomenclature) to improve the quality of research, teaching, and learning. These funds – called Development and Innovation Grants ... – were to be allocated on a competitive basis and sought to ‘enhance the capacity of HEIs to seek innovative solutions to address national/local development issues’. (Rappleye & Un, 2018, pp. 250-251)

However, together with stringent and complex procurement regulations and personnel problems, the World Bank-designed policy faced a major contextual obstacle: the lack of PhDs in the country.

Put simply, there were very few PhDs in Cambodia, whether in the universities or in the Ministry itself. At the Ministry's DHE [Department of Higher Education], there was only one PhD holder. He served as the head of the Department of Scientific Research, but was quickly deemed by the Bank to be operationally incompetent (because his research was deemed to be too theoretical) and was thus not invited to take any part in HEQCIP implementation. (Rappleye & Un, 2018, p. 262).

The point here is that there were too few researchers in the country with sufficient experience to manage “multi-year research projects with large amounts of funds” (p. 261). In response, both the Ministry and the World Bank sponsored trainings on research for local researchers inviting foreign consultants, but they were of little use, “not simply because they were out of touch with local conditions and delivered in English, but because it is fundamentally impossible to teach ‘how to research’ in two or three short weekend sessions” (p. 262). Consequently, most of the received proposals were considered of low quality and/or were ‘development-style implementation projects’—e.g., awareness-raising campaigns, infrastructure-building projects, etc.—rather than research proposals, which were the purpose of the program.

According to Rappleye and Un (2018), these problems happened due to the “incongruence between the Bank's policy vision, its assumptions about ‘context’, and the actual Cambodian context” (p. 260). Rappleye and Un (2018) argue that the World Bank's approach to ‘context’ refers to simple statistical portraits based on, for example, “an overview of macroeconomic indicators, gender and equity disparities, and then ... enrolment rates and projections” (p. 264). These authors, both former World Bank consultants, further argue that the World Bank uses “common contextual categories” in its understanding of all countries:

The common contextual category of ‘university’, when applied to Cambodia, implicitly replaces realities on the ground with the Bank ideal of an institution, filled with PhD holders, and dedicating itself to teaching, research, and national development. It is a clear illustration of an observer ‘who naively substitute[s] his own ideal types of [(sic)] those in the minds of this subject’ (Schütz [1932] 1967, 205). What is most striking is not that the Bank distorts interpretation of key contextual variables, but instead, that it ignores them. Adopting a common contextual categories approach effectively means the Bank operates in a closed communicative system with no possibility that context (as opposed to ‘context’, i.e. the paper-thin image of context generated out of common contextual categories and published in Bank documents) can influence its ‘thinking’. (Rappleye & Un, 2018, pp. 264-265)

Relatedly, other studies, such as the one by Tadevosyan (2008) on community-based management of education in the Armenian context, show the complications that can arise when the characteristics of the local context are not addressed in project planning. As the World Bank admitted, the outcomes of community participation in reform efforts were not the ones expected because of “the lack of a comprehensive and consistent decentralization policy; blurring and confusion of roles and responsibilities among local, municipal, regional and national level government; limited local government capacity and resources; and lack of viable and legitimate community organizations and institutions” (World Bank 2000, p. 7, in Tadevosyan, 2008, p. 87). Interestingly, this seems to differ from the case of community-based management in El Salvador, which has been considered by many as successful in implementation—at least in terms of the extent of implementation, if not its quality—because it thoroughly addressed the technical, the institutional, and the political dimensions of reform, considering the specificities of the Salvadoran context (Edwards et al., 2015). It may be that the difference between the El Salvador example, on one hand, and the Cambodia and Armenia examples, on the other hand, is that, in the context of the former (El Salvador), the World Bank was both ideologically on the same page as the government and both were willing to work together to alter the context (e.g., the organizational context of the Ministry of Education) in ways that would enhance project success. Where this is not the case, the World Bank may ignore the context or may portray it as overly rosy at the time of project design in order to ensure that the project is approved and the funding flows.

Going back to the Armenian case explored by Tadevosyan (2008), another aspect found in the study which complicated policy implementation was the misalignment of the project, which focused on school-based management, with local skillsets and culture, wherein traditional hierarchical relations are prevalent. Tadevosyan (2008) explains:

In school communities, ... parents were willing to articulate ideas, but felt that they had neither the right—nor the responsibility—to propose practical solutions. Similarly, teachers took responsibility within their own classrooms, but agreed with parents that school directors were the key decision-makers (World Bank 2000, 8). The combination of these complications suggests that Armenia’s parents and communities were simply not prepared to take on new responsibilities. They were neither fully aware of their new roles nor equipped with the necessary skills to become involved in school life in a meaningful way (p. 88).

Similarly, in India, there was a strong reluctance from the social elites to expand primary school, because there was the thought that children from poor backgrounds needed to support their families by working (Mangla, 2018). This belief, framed within the culture of the caste system, is noted as a possible factor for the Indian state’s failure to enact universal primary education in the late 1980s, a policy which was being supported by the World Bank. Separately, in the Ethiopian and Namibian contexts, research has shown that a difference in ideology between the World Bank and the country

governments—with the latter being influenced by socialist thought—caused disagreements on the content of education reform (Takala, 1998). While these examples make explicit the obvious point that it is necessary to be sensitive to contextual factors when designing and implementing projects, it is also the case that World Bank staff, at the stage of loan preparation, often have little incentive to engage meaningfully with local context, since their primary concern is securing loan agreements, which can lead to professional success and promotion within the organization, and not necessarily the challenges that will arise over the multi-year life of the project as a result of poor preparation.

Final Remarks

This article has explored, drawing on a systematic literature review, the different modes of influence of the World Bank on the implementation of education policies. The findings have illustrated three ways in which the World Bank influences implementation: through the design of policies and the use of conditionalities, through technical assistance, and through the evaluation of implementation. This focus has allowed us to stretch the typical approach to ‘implementation’ beyond the mere execution of policies to also consider the design and the evaluation of policies as a necessary part of implementation. Additionally, this study complements previous analyses of the World Bank’s pathways of influence on policy formation in education (Authors), shedding light on how these pathways extend into the implementation phase.

It is true, however, that the World Bank’s primary function is not implementing education policies (see, e.g., Heyneman, 2003; and Mundy & Verger, 2015). In fact, despite the diverse means of influence available to the World Bank concerning policy formation—evidenced by at least eleven distinct pathways identified in previous analyses (Authors)—its capacity for intervention and control is surprisingly low when it comes to the execution and practical implementation of policies (Steiner-Khamsi & Stolpe, 2004). To some extent, this scenario can be advantageous for the World Bank, as it absolves it from bearing responsibility should the objectives of the reforms and projects fail to materialize (Klees, 2002).¹⁰ In most instances, countries collaborating with the World Bank do not have full-time World Bank personnel located in country to assist with policy implementation. In these situations, the Bank typically sends missions periodically, every few months, to oversee implementation and provide assistance. But even in cases where World Bank staff reside in those countries, the implementation processes require collaboration among numerous stakeholders operating at various governmental bureaucratic levels and across multiple geographic regions, and these processes often escape World Bank control (Edwards, 2019). In many regards, control of an international organization over a government, regardless of its income level, is more of a fiction than

¹⁰ This is not to say that the World Bank is not interested in how well it contributes to the implementation of policy and how well its policies are in fact implemented, as evidenced by the project reviews produced by the Independent Evaluation Group within the World Bank. These reviews represent a promising avenue for future research.

a real possibility. Influence is more likely to be indirect. Indeed, over the life of a World Bank project, much policy guidance occurs in informal (and undocumented) ways through repeated opportunities for interaction between World Bank staff and government officials.

The complex relationships between the World Bank and governments and other local institutions—essentially, between ‘the global’ and ‘the local’—connect us back to the approach of “global-local conditions of possibility” (Rhoten, 2000). This optic has proven useful not only for understanding the World Bank’s influence on the implementation of education policies but also for grasping, with more nuance, the dissonances between what is expected by the World Bank, how policies are received by governments, and their execution in practice. Using the terminology of this approach, attention should be paid, on the one hand, to the dimensions of ‘policy origins and intentions’ and, on the other hand, to ‘policy context.’ For example, it is important to consider how the different historical relationships between the World Bank and governments mediate the process of implementation of education policies, influenced by both path dependencies and the receptivity of governments and different actors to policies promoted by the World Bank. One must acknowledge that these relationships are framed in and shaped by specific political-economic conditions. In many cases, especially in low-and/or middle-income countries, there exists a necessity for the funds disbursed by the World Bank. This generates an asymmetry that provides the Bank with leverage to influence education policies and their implementation. Furthermore, even in cases where this economic component may not be present, one must also consider the asymmetry in terms of prestige and legitimacy. In other words, beyond strictly material considerations, the influence of the World Bank can derive from its reputation and from the fact that it—and the knowledge and policy recommendations it produces—are perceived as a legitimate (Author et al., 2023; Verger, 2012). In summary, the World Bank holds a position of material and symbolic centrality in the ecosystem of organizations aiming to influence education policies, affecting its capacity to influence policy formation and implementation processes—a reality which does not preclude states from exercising autonomy and agency in generating policy ideas or in selectively adopting certain policies.

However, despite such capacity to influence the implementation of education policies, the results also demonstrate how, when policies meet the actors who interpret and implement them, unexpected effects can occur. This finding directly connects with the third and fourth dimensions highlighted by Rhoten (2000): ‘policy interpretations’ and ‘policy actions.’ Here, the results of the literature review show the role played by government actors in policy implementation, concerning both the meanings they attribute and the ways they react to the material and technical resources at their disposal, not to mention the way that actor interests and actions intersect with and are shaped by features of the context discussed above that, in turn, mould actor preferences and incentives. For instance, the literature illustrates cases of resistance during the implementation phase to policies promoted by the World Bank in situations where these policies did not align with

or contradicted the (ideological, financial, political) factors that motivate local actors, their modes of operation, or their sense of policy ownership. The most significant and evident dissonances between the World Bank's expectations and policy implementation occur in cases where the World Bank is not sensitive to the specificities of the context. It is noteworthy, in line with Rhoten (2000), that these specificities do not only respond to the country's macroeconomic data but also to those historical, material, and cultural factors that shape and condition the process of implementing education policies.

Finally, while this study has been instrumental in identifying various pathways of influence in education policy implementation, we acknowledge its limitations in addressing the potential evolution of these pathways over time and their heterogeneity across regions. Over its more than eight decades of existence, the World Bank has shifted its modes of influence—from mechanisms primarily tied to loans to a growing emphasis in recent decades on knowledge production, dissemination, and aid coordination (Authors; see also Bedasso & Sandefur, 2024). Specifically regarding the World Bank's influence on policy implementation, future research could address these limitations by adopting a time-sensitive and context-specific approach to better capture the complexity of its operations. Moreover, this study does not consider scenarios in which the Bank funds multiple, interrelated projects over time or simultaneously—a situation that may confer a greater degree of influence on implementation processes than does a single project.

We further acknowledge that this study does not analyze distinctions between different types of World Bank projects, such as structural adjustment, sectoral support operations, or infrastructural improvement projects (e.g., building schools). This level of detail was beyond the scope of our analysis. However, future research should explore how these project types influence policy implementation differently, particularly since structural and sectoral adjustment operations may involve more direct policy engagement compared to infrastructure projects.

Although we have been able to identify trends and to highlight dynamics between the World Bank and governments in the implementation of policy, it should be underscored that there are still few studies that have been able to get inside the interactions and processes through which the World Bank works with counterparts to shape the ways that policies are put into practice. There are various reasons for the scant nature of literature in this area. First, access to the spaces where the influence of the World Bank on education policy implementation can be observed is typically difficult for reasons of logistics and politics. Second, for those individuals who do have access to the spaces and stakeholders that are central to policy, project, and program implementation, there is a disincentive to share sensitive information, let alone to produce (critical) academic publications based on it, for doing so risks jeopardizing relationships and access. Despite these challenges, it will be important to be more attentive to policy implementation dynamics going forward. This area is ripe for future research.

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Table 1. The Global-Local Conditions of Possibility Approach	
Dimension	Focus
1. Policy origins and intentions	Exploration of pressures of international policy actors as well as the history, content, and discourse of related national reforms
2. Policy contexts	Examination of national government's historical relations with international organizations as well as the effect of current political-economy conditions on these relationships
3. Policy interpretations	Mapping of key educational actors, their roles and responsibilities as well as the meanings they assign to the reform in question
4. Policy actions	Investigation of how actors react to and enact the reform in question with attention to the ways that the latter (enaction) is shaped by material (technical, financial) resources and cultural assumptions

Source: Adapted from Rhoten (2000).

Table 2*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 (2.4)
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	16 (38.1)
3. Critical discourse analysis	Focus on World Bank knowledge development while taking into account material and discursive nature of relations of power	4 (9.5)
4. Post structuralist	Focus on production and influence of World Bank discourse	2 (4.7)
5. Global governance	Focus on involvement of a variety of international organizations in processes of policymaking and implementation	15 (35.7)
6. Policy borrowing	Focus predominantly on borrowing, transfer, and/or adaptation dynamics of policies supported by the World Bank	2 (4.7)
7. Apolitical policy implementation	Focus on evaluating the effects in practice of World Bank-supported policies	2 (4.7)
Total		42 (100)

Table 3*Methodological Approaches Reflected in the Retained Literature*

Theoretical approach	Description	# (%)
1. Case study	Label applied for publications that either (a) explicitly state their method as case study or (b) are a case study in form.	14 (33.33)
2. Policy analysis	Label applied to studies that analyze policies remotely, based on secondary data or (critical) interpretation	6 (14.29)
3. First-hand account	Label applied to studies based on first-hand participation by the author(s)	5 (11.9)
4. 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	4 (9.5)
5. (Critical) discourse analysis	Label applied to studies that state or employ (critical) discourse analysis as their method	2 (4.7)
6. Document analysis	Label applied to studies that are based exclusively on document analysis	9 (21.4)
7. Apolitical policy implementation	Label applied to studies based on quantitative methods	1 (2.4)
8. Mixed Methods	Label applied to studies that employed both qualitative and quantitative methods	1 (2.4)
Total		42 (100)