CHAPTER 9

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"ALL THINGS BEING EQUAL?"

Policy Options, Shortfalls, and Absences in the World Bank Education Strategy 2020

INTRODUCTION

The World Bank's new education sector strategy (*World Bank Education Strategy 2020*, hereafter referred to as *WBES 2020*) establishes the guidelines for new education priorities in low-income contexts for the coming decade. *WBES 2020* attempts to move the focus of education reforms further away from an inputs rationale to a reform agenda with outputs, governance, and managerial solutions at its core. More specifically, it advocates: (a) the adoption of a *systemic* approach to education reform that strengthens the role of non-government players and incentives in education, (b) a more discernible focus on learning outcomes, which implies measuring school results in order to generate a knowledge base with which to inform policy-makers and families, and (c) the dissemination of innovative approaches and demand-side interventions that can contribute to improving learning outcomes effectively.

WBES 2020 deserves our attention due to its enormous impact on the field of education for development. The World Bank's Education Strategies, which are carefully distributed all around the world, have a great capacity for establishing education agendas globally. They are perceived, and to a great extent used, as a policy guide by many stakeholders operating in the field of education for development, including donors, NGOs, and ministries of education in less-developed countries. The education sector strategies are probably the most outstanding policy document contributing to positioning the Bank as the intellectual leader of education reform in the field of development aid.

The explicit title of *WBES 2020*, *Learning for All*, is a clear recognition that something else must be done, beyond policies focusing on access, to ensure that schooling involves positive learning experiences. This could be perceived as a step forward in the World Bank commitment to education for development. However, as this paper argues, the Bank's explicit and underlying policy options in *WBES 2020* reflect more continuities than breaks when compared to previous strategies, and moreover these policy options might not be adequate to achieve the "learning for all" goal.

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To develop this argument, this chapter is structured into two main sections. In the first section, we briefly review the development of the World Bank agenda in the educational field, as a way of putting the *WBES 2020* and its content and priorities into historical perspective. As we shall see, this agenda has broadened and become more ambitious with the passage of time. The current strategy involves telling developing countries worldwide why they should introduce complex changes in the governance of their education systems to enhance the learning opportunities for all students. However, when it comes to the *WBES 2020* defining specific prescriptions, all things seem to remain quite equal in the World Bank's education policy toolbox.

In the second section of this paper we identify and explore the main weaknesses of the policy ideas included in *WBES 2020*. We develop three sets of arguments in this respect. The first one refers to the Bank's strong attachment to a disciplinary and methodological approach that is incapable of understanding what children learn and do not learn at school and why. The second group of arguments refers to the pro-market ideological bias of the Strategy with regard to public sector reform and new forms of educational provision. In third place the article points out the main shortfalls of the Strategy, with special reference to those omissions related to the complexity of the relationship between education and poverty.

WBES 2020 IN PERSPECTIVE

The World Bank does not have an official mandate on education due to the fact that UNESCO is formally the United Nation's institution specializing in education. Nevertheless, paradoxically, the Bank has become one of the most influential international organizations in the field of education for development (Mundy, 2002). In fact, after reading *WBES 2020*, which has the approval of the organization's Executive Board of Directors, it might well be considered that the Bank has an implicit and broad mandate on education. This mandate could be summarized as the improvement of learning outcomes globally as a means of reducing poverty and integrating countries into the global economy.

The World Bank's first projects, when it was established in 1945, focused on infrastructure development and had no connection whatsoever with education. In the nineteen sixties however, the Bank began to involve itself in education affairs, although often indirectly. The first education initiatives were subordinated to major infrastructure projects (e.g., they consisted of training programs designed to provide local workers with the skills they required in the construction and maintenance of new infrastructures) or consisted of education infrastructures themselves. Thus the first education projects that the Bank was involved in were very much restricted to the material aspects of education systems: the building of schools or the transfer of material assets for laboratories, workshops or libraries (Jones, 1997). Over the years the Bank moved from the hardware to the software of education systems, hired more staff specializing in education and adopted an agenda that was much more oriented towards "education policy" and not only to manpower demands (Human Development Network, 2002; Mundy, 2002).[i]

The 1980 Education Policy Paper encourages the Bank staff, for the first time, to use rates of return in its analytic and projects lending work. As a consequence of the adoption of the rate of return analysis, the Bank's education policy agenda was condensed into the so-called "short menu" of education policy (Heyneman, 2003). This menu, which clearly crystallized in 1986 into the Bank's policy note "Financing Education in Developing Countries," advocated: (a) concentrating public investment in primary education, encouraging the privatization of higher education levels, (b) increasing the private cost for attending secondary and higher education, and (c) installing cost-recovery measures (loan schemes and taxes on graduates) in higher education (Jones, 1997).

The "short menu" prevailed for years in the Bank's discourse and practice regarding education, and was reinforced in the 1995 World Bank policy review *Priorities and Strategies for Education*. This document was given the status of a "policy review," although in reality it is highly prescriptive in nature.[ii] In addition to funding options similar to those included in the short menu, the review pledged its commitment to policies such as the decentralization of education systems, school autonomy, and the measurement of education outcomes. It also expressed an interest in the area of curriculum planning, highlighting the importance of subjects such as mathematics and language for economic development, and recommended establishing clear performance indicators to monitor the extent to which learning standards were being attained (Lauglo, 1996; World Bank, 1995). The 1995 Policy Review represented an expansion of the short education menu, which was very much focused on education financing, and a move towards a more comprehensive approach to education reform, including recommendations concerning curricula and the regulation and provision of education.

The first official education sector strategy was published in 1999.[iii] This strategy set out the following priorities: promoting quality education for all in order to address the huge gaps in learning among and within countries (with a focus on girls and on the poorest), early child development (ECD), innovative delivery (i.e., education services provided via ICTs) and systemic reform. The systemic reform focused on three areas that had already been formulated in a very similar way in the 1995 Policy Review: (a) standards, curriculum and achievement assessment, (b) governance and decentralization, and (c) encouraging investment in education by the private sector (World Bank, 1999).

The 1999 Strategy was updated in 2005. The most significant innovation included in this update is an apparent loss of centrality of the rates of return analysis due to a renewed emphasis on public investment in higher education. This shift was justified by the strategic contribution of universities to the building of "knowledge economies" (World Bank, 2005). The "knowledge economy" idea became a very powerful economic imaginary in the last decade, and most countries on the planet, those from both the developed and the developing world, expressed and still express their ambition to become such a type of economy (Robertson, 2005). However, it should be also considered that, since the World Education Conference held in Dakar in 2000, the donor community, and in particular the Education for All Fast Track Initiative, headquartered in the World Bank, has concentrated more efforts on the funding of basic education. Consequently, financial resources have been freed for the Bank to lend in other levels of education.

In 2011, after a long and unprecedented consultation process that included dozens of meetings in 53 different countries, *WBES 2020* was published. Despite the input received from hundreds of stakeholders during these consultations, the new Education Sector Strategy reflects more than anything continuity within the World Bank's education policy agenda. The focus on systemic reform, learning outcomes, evaluation and measurement (both at the national and cross-national levels), the key role of the private sector, the positive effects of ECD, and the importance of education as a key tool for tackling poverty and reinforcing employment markets is formulated in a similar way in all the Strategies (including the 1995 Policy Review). The last two Strategies emphasize the importance of generating a knowledge base for education systems, and put forward initiatives aimed at achieving this (EKMS in the 1999 Strategy, and SABER in the 2020 Strategy).[iv] The first education strategy documents use human capital theory to justify investment in education (and the involvement of the World Bank in education), whereas the most recent strategy uses a revised version of this theory devised by the Bank's current education champion, Eric Hanushek, who replaces "years of schooling" with "learning achievement" as the independent variable for economic growth. Lastly, the Bank's desire to collaborate in bilateral and multilateral aid delivery partnerships with other aid agencies has been expressed since the 1995 policy review, although it is more broadly developed in the subsequent Sector Strategies.

Naturally, some differences can also be identified. In terms of systemic reform, the current Strategy displays less interest in decentralization and curriculum policies than that expressed in the 1995 and 1999 documents, and gives more importance to governance changes based on accountability and incentives schemes, and also to the role of the private sector. Despite reservations, the 1999 Strategy acknowledged the importance of teachers' organizations in formulating and implementing reforms, yet in *WBES 2020* there is not a single reference to them. The current Strategy lacks the technological optimism of the 1999 document, and attributes a much more secondary role to ICT education. Lastly, it is significant that, for the first time, *WBES 2020* acknowledges that there is no trade-off between equity and quality, and that more equitable systems in fact achieve better results.

The continuity in the themes, priorities and policy options of the Bank's education strategies over time, and also the different levels of emphasis given to certain topics at different moments, can be clearly seen in the following charts (see Figure 1).[v]

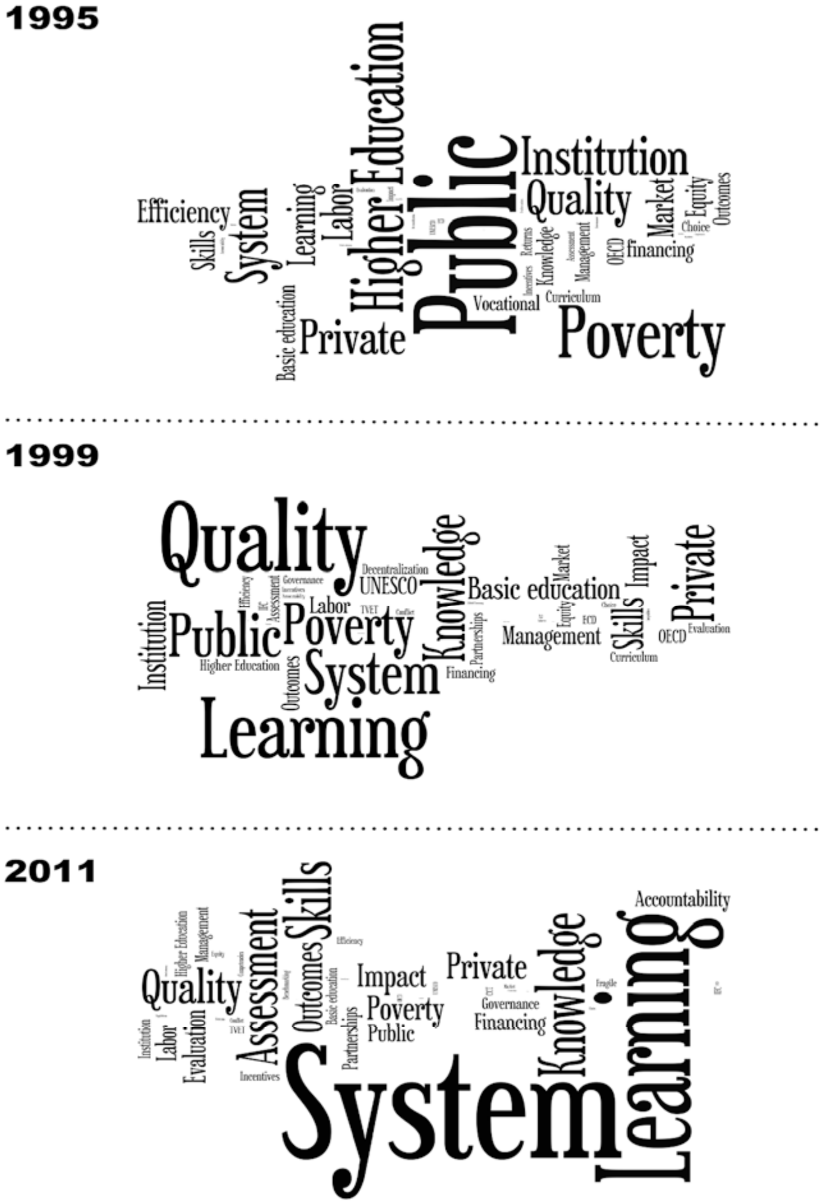

Figure 9. Keywords Clouds in Past and Current Education Strategies (1995, 1999 and 2020)

EXAMINING THE BANK'S "LEARNING FOR ALL" STRATEGY

The explicit title of the new strategy, *Learning for All*, carries an implicit recognition of the limits of past education strategies, which have failed to transform educational investment into sufficient learning, especially for the poor (Bonal, 2007; Jones, 2006). Far from introducing self-criticism, the *WBES 2020* interprets the history of the Bank's strategic policies as an accumulative process of learning "what works best" in education. In this section, we point out the main problems and shortcomings that prevail in the causal ideas and methodological strategies that support the World Bank's current education agenda. Specifically, we problematize three main aspects: the predominant economic approach to education analysis and reform; the emphasis placed on education markets and the role of the private sector; and the shortfalls in the complex relationship between poverty and education.

Captured by the Method: Learning within the System Approach

The World Bank's main policy recommendations in the field of education included in this and in previous Strategies are shaped by an economic rationale and spring from an economics-based view of education problems. In fact, as the World Bank itself admits, one of the implicit objectives of the Education Strategies is to inform outsiders about things that insiders take for granted, such as "the value of an economics-based approach to education development" (HDN, 2002, p. 430). However, this disciplinary bias also has its limitations, and contributes to constraints by the analytical methods it uses for studying educational systems and policies. The goal of developing a universal and irrefutable scientific knowledge base and methodology for evaluating educational reforms, together with a strong belief in market solutions for such development, leads the Bank into dismissing other more context-sensitive approaches for assessing educational policies. The inclusion of such approaches would make the Bank more cautious about any pretension of universality.

One of the main features of *WBES 2020* is its desire to overcome input-driven reforms and place learning outcomes as the central goal. Learning for all, and not simply access for all, is set up as the main priority. As stated in the Strategy: "improving systems also requires ensuring that inputs are used more effectively to accelerate learning. While past strategies have recognized this goal, the new strategy gives it more emphasis, setting it in a context of education system assessment and reform" (p. ix).

However, what does moving beyond input-driven policies mean for the Bank? The Bank interprets this as changing the governance and management of schools and teachers and aligning financing rules and incentive mechanisms with the goal of learning for all (p. x). Beyond a widespread support for the introduction of market rules and demand-side interventions into education systems, it is not possible to distinguish in the Strategy which specific forms of governance and management are the ones that would ensure learning, as it is not possible to identify which specific causal relations explain learning better. The Bank is extremely vague about how to introduce reforms in these areas: "The mechanisms that connect the various parts of the system need to be reformed so that functions, authority, and relationships of accountability within the system are clear and aligned with national educational goals" (p. 18).

Here lies one of the main contradictions of the Strategy. The Bank defends evidence-based policies, but is unable to provide convincing evidence about what really works to ensure that children do learn at school. Actually, the Bank defines the Strategy in terms of two main approaches: strengthening education systems and building a high-quality knowledge base. Interestingly enough, the nature of these two approaches is significantly different. Both of them carry a substantial level of generality, but while the first approach can be translated into specific measures that would potentially improve learning, the second approach can only be understood as providing the necessary means for knowledge and not as a strategic action that would improve learning. In other words, it is possible to establish a relationship between better education systems and better learning, but not between knowing more about the education system and better learning (and thus it is of course possible to have an extensive knowledge about an education system and have a high rate of low performers). Acquiring knowledge about the education system is of course necessary, but one would expect a strategic paper to reveal which knowledge and for what specific purposes.

The nature of the knowledge about education systems that the Bank expects to obtain reflects a systemic view of education systems, which can be defined as the chain between input-processes-outcomes of different integrated education factors. For the Bank, better knowledge about education systems means obtaining more information about each of these phases. Applying a systemic approach to policy making is a difficult task, since policy-makers cannot control all the factors that may potentially improve education systems. Thus, "the key to implementing the system approach is to recognize that it does not imply *acting* on all parts of the system at once, but being aware of them and analyzing how they affect each other" (p. 42). This fact, for the Bank, can be translated into the principle "analyze globally, act locally" (p. 6).

The priorities established by the *WBES 2020* are a good example of how the Bank aims to lever its capacity to lead the global analyses of education systems. Among other applications, this makes it possible to run cross-country regression analyses with numerous observations, which can respond to the expressed aim of generalizing results. "All things being equal," the Bank should then be able to deduce what works better universally to improve learning. The Bank's implicit message to national governments seems to be: "improve your data collection capacity so that we can run more reliable cross-country analysis and regressions."

Due to the territorial scope of the World Bank, its methods of study and policy recommendations must necessarily be applicable to different social contexts and different education systems. However, at the same time, the World Bank is increasingly defending the importance of context-based policies and strategies. Despite this intention, the Bank is constrained by a method that intrinsically ignores the context. While learning processes are by their very nature contextually based on the living conditions and cultural experiences of individuals, the World Bank confines the Strategy within the limits of education systems. The Strategy "redefines" the term education system as a network of relationships, including all potential players intervening in the learning opportunities offered by a society, i.e., within and outside of formal education institutions (p. 16). However, the methods for providing evidence are restricted to techniques (such as regression analysis or production functions)[vi] that reveal the inability of the Bank to grasp those factors that are not easily measurable or observable. According to Weaver (2007): "[Within the Bank] considerable weight is given to economic and technical factors that are easy to identify and measure, whereas complex political and social risk assessments that involve soft qualitative indicators are usually neglected or distrusted as 'unscientific'" (p. 507).

The system approach defended by the World Bank is in fact a sign of the power of the method. The best example of this can be found in Point 20 of the executive summary, where the Strategy states that "careful system analysis will allow for clearer differentiation of countries by level of educational system, rather than by overall development alone" (p. xi). This is actually a declaration of principles: the performance of education systems, rather than their development, is the main goal. Why the good performance of education systems is not translated into more development, or why good educational performance is unable to reduce poverty and inequality, are questions that are omitted in *WBES 2020*.

A final observation about the power of the method has to do with the possible reasons that motivate the inclusion of learning as a priority goal of the strategy. There is of course evidence showing the limits to the extent that educational expansion can be converted into learning. Other strategic declarations, such as the recent *Metas Educativas 2021* (Educational Goals) for Latin America, stress the fact that Latin American countries have been able to expand primary and secondary education over the past decade, but unable to achieve high educational performance. However, over the past decade we have witnessed the widespread application of performance evaluation systems and especially the consolidation of PISA as the main reference of skill acquisition in educational systems. PISA is, as *WBES 2020* acknowledges, a powerful instrument for assessing educational performance, but it is in no way a context-based instrument for discovering how and why children learn in different educational systems. The main asset of PISA is that it is a measurable instrument that facilitates comparisons. The temptation to reduce learning measurement to performance in international standardized tests (such as PISA, TIMSS or PIRLS) is too strong to be avoided. Nonetheless, useful learning for social and labor inclusion goes far beyond merely performing well in standardized tests.

Reducing the analysis of learning factors to variables that are measurable and quantifiable, as well as internationally comparable, is actually a clear sign of the power of the method. In *WBES 2020*, the World Bank proclaims itself as the global leader and promoter of a paradigm of educational research that incorporates a pretension of universality and irrefutability that cannot easily cope with the goal of contextually based learning.

Overrating Market Solutions

The World Bank has been backing private sector participation in education for decades. However, in this regard the 2020 Strategy goes a step further than previous policy papers. The current Strategy puts stronger emphasis on the importance of the private sector for meeting the EFA goals, it is openly supportive of "for-profit" private education providers[vii], it raises the educational lending profile of the International Finance Corporation (IFC)—the World Bank Group agency that deals directly with the private sector, and it considers that the private sector can be of direct benefit to the poor.[viii] In relation to the latter, it should be acknowledged that the 1999 Strategy rather established an indirect relationship between private schooling and poverty, the rationale being that those families that can afford it should attend private schools, because by doing so they release government resources that can be invested in improving the public schools attended by the poor. By contrast, *WBES 2020* states that: "Although it is often assumed that the private sector serves mainly students who can afford to pay, private entities are important providers of education services to even the poorest communities, especially in areas that governments do not reach" (p. 20).

Implicit in *WBES 2020* is the fact that private institutions are inherently better than state schools, and that poor students will benefit from attending private schools—by means of a voucher system, for example (p. 6). However, the Strategy provides no evidence of the supposed better performance of private schools, though it should be acknowledged that evidence on the topic is very mixed. In fact, it is not possible to reach universal conclusions on this topic because research results are highly contingent on the different types of private schools, the socio-economic composition of schools and the education regulations prevailing in different countries (Calero & Escardíbul, 2007; Vandenberghe & Robin, 2004). Interestingly enough, recent analyses of PISA data tell us that, "all else being equal" (especially when controlling for the socio-economic status of students), the type of ownership of the school, whether it is a private or a state school, has only modest effects on students achievements or none at all (Fertig, 2003; OECD, 2005; Corten & Dronkers, 2006).

WBES 2020 strongly advocates that governments establish partnerships with the private sector and regulate this sector in a way that encourages the emergence of private providers and controls the quality of the services they provide. In line with the categories suggested by Ball and Youdell (2007), we might consider that the World Bank supports two types of privatization: on the one hand, the privatization *of* education, and on the other, privatization *in* education. The privatization *of* education consists of encouraging the increase of private provision and the number of private schools within education systems. The Strategy suggests that this can be done by means of contract schools or subsidies to the private sector. The main objective of the privatization of education is to expand the schooling resources available in a particular territory.

For its part, privatization *in* education consists of encouraging state schools to behave and be run like private providers, with the aim of making them more competitive and raising their quality standards. According to *WBES 2020*, these objectives can be achieved by introducing incentives schemes and competitive funding formulas (vouchers, results-oriented financing, etc.). Influenced by economic theory and by a rationalistic conception of humans as benefit-maximizers, competition and school choice are two core policy principles in the 2020 Strategy. Both principles are expected to be important elements in the "results chain that lies between inputs and learning outcomes" (p. x) that the 2020 Strategy attempts to identify: "Power of greater autonomy at the provider level and of competition for resources (such as through the use of performance incentives or vouchers) [will contribute] to generate a strong motivation among providers for better service delivery" (p. 15). At the same time, the Strategy assumes that choice and competition will contribute to low-quality schools losing enrollment and consequently disappearing from the market.

Applying market metaphors such as choice or competition to education systems sounds persuasive. However, such metaphors are very difficult to translate successfully into practical policies. Optimum school choice requires conditions, such as perfect information or sufficient offer, which are hardly ever met in low-income contexts. Even when the right to choose is guaranteed by the state, most families, especially those affected by poverty, fail to exercise this right as the Bank would expect (i.e., by choosing the better school). Rather than choosing based on school quality, families usually choose a school accordingly to criteria such as proximity, cost, social relations, pre-conceptions of the different types of schools, religious preferences or discipline in class (Nieuwenhuys, 1993; Härmä, 2009; Fennel, 2012). Moreover, in poor, rural, or under-populated areas families may not have enough providers to be able to choose.

Regardless of whether they are desirable or not, markets in education may not be feasible in many countries where the World Bank intervenes, because they are very costly and technically demanding. In order to work properly, markets in education require a very complex and often expensive set of support services and procedures (transportation, quality assurance, information systems, dispute settlement systems, bidding processes, etc.) the implementation of which might be too challenging in low-income countries (Verger, 2011). Not surprisingly, the 2011 Independent Evaluation Group report finds quite uneven results in the World Bank portfolio of education projects due to "design and implementation weaknesses" including "overly complex designs relative to local capacities" (IEG, 2011, p. 13). Furthermore, if the for-profit sector is to be included in the provision of public education, as *WBES 2020* suggests, the economic incentives that the state would have to provide them to deliver their services in poor areas could make the proposal even more expensive (Rosenau, 2000).

In many low-income countries, the amount of private education on offer is very low. Thus, instead of expecting state regulation to encourage the flourishing of private education entrepreneurs, states would reach the EFA targets in a quicker and more sustainable way by enlarging and strengthening the public sector. At least, this is the conclusion of Lewin (2007) in a cross-country research on this topic in Sub-Saharan Africa. As Lewin warns, markets-in-education policies are too often inspired by experiences and models drawn from well-developed, professionalized, regulated, and (already) partly marketized education systems. These policies are not easily transferable to partly developed, poorly professionalized, largely unregulated systems such as those existing in the countries where the World Bank operates.

Moving Lewin's argument on a little further, it should be acknowledged that even in rich countries, the evidence for the positive effects of markets in education is still not conclusive. After reviewing hundreds of pieces of research on school choice and competition between schools, a recent OECD Education Paper concludes that, "if any effects are found at all, they are small" (Waslander et al., 2010, p. 64). However, the World Bank misrepresents an important part of the literature on the topic and, very selectively, overestimates the results of its own impact evaluations and the research of like-minded scholars. Its policy recommendations contradict research that points out to the neutral or even negative effects of education markets in dimensions such as achievement (see Rouse & Barrow, 2009; McEwan & Carnoy, 2000), efficiency (Levin, 1999), and especially equity (Reay, 2004; Fiske & Ladd, 2000; Alegre & Ferrer, 2010).

WBES 2020 is very optimistic about the potential role of the IFC in benefiting the poor through private education. Among other factors, the Strategy supports the IFC due to its capacity for providing financing for "larger network providers who have the ability to invest across borders and go down-market to reach poorer populations" and "small and medium enterprises which typically target poor populations" (p. 32). However, as recent research shows, the IFC is not reaching the poorest countries and the poorest populations. Between 2006 and 2010, only 4.8 percent of IFC education investments were made in low-income countries, and 67 percent of the current projects are at the tertiary education level (Mundy & Menashy 2012). Furthermore, as the same study shows, equity investments in education are considered risky within the IFC. In 2010, an internal rate of return of -32 percent was reported in educational projects.

To conclude, it is a very positive fact that the Bank, via *WBES 2020*, is moving away from a too simplistic focus on inputs when it comes to education reform. However, the current focus on managerial solutions, private education, and education markets should not detract from the fact that most education systems in low-income contexts still have strong dependence on increasing levels of public investment in schools building, books, teacher training and salaries (Glewwe, 2002).[ix]

Closing the Learning Gap: A Goal without Means

One of the salient features of *WBES 2020* is the importance given to the relationship between equity and learning. This is certainly a new strategic direction that is absent in previous strategies. The 1995 Policy Review was clearly dependent on an economic policy that almost despised social and educational inequalities as factors preventing development. There, the goal of economic growth was the main, and almost exclusive, priority for the World Bank.

In contrast, the current Strategy aligns the objective of Learning for All with the equity goals that underlie the education MDGs. This assertion is repeated in several sections of the Strategy, and it is based on the evidence provided by the PISA results. Thus, the Bank highlights that “the latest (2009) PISA results reinforce the lesson that the countries that are most successful overall in promoting learning are those with the narrowest gaps in learning achievement among students” (p. viii). When reading this, one would expect that recognizing the centrality of equity would be translated into a set of policy recommendations to address the inequalities in education systems effectively. However, the “equity matters” discourse does not lead to any redistributive orientation of education policies. The Bank’s emphasis on evidence-based policy is absolutely partial here. While the Strategy recognizes the importance of equity, it ignores those forms of evidence that explain why education systems remain unequal. Evidence related to education system regulations, school segregation, differences in school quality or the “peer effect” on learning is completely ignored.[x]

Interestingly enough, the Strategy draws a narrow equivalence between equity and targeting population groups that experience specific barriers to learning. It states: “A well-functioning education system will therefore have policies or programs that specifically address the disadvantages faced by some population groups … and will target special resources to assist those disadvantaged groups” (p. 21). The reduction of equity to targeting resources means also avoiding possible universal policy strategies that could potentially reduce educational privileges and redistribute educational opportunities among the most disadvantaged groups.

Within the notion of targeting, the Bank includes “demand-side interventions, such as the abolition of school fees and targeted scholarships, cash transfers that compensate families for the opportunity cost of children’s school attendance, and vouchers that enable poor students to attend private educational institutions” (p. 6). This quote shows that the Bank includes demand-side interventions of a very different nature within the same set of policy instruments. However, abolishing school fees, arranging conditional cash transfers (CCTs), or giving vouchers to poor students to attend private institutions are policies that respond to very different conceptions of educational equity. Moreover, the evidence regarding the effects of some of the proposed policies is not at all conclusive, and as a consequence it is questionable whether they can be taken as best practices for achieving learning for all.

CCT evaluations, for instance, offer a picture of different effects at different levels, depending very much on program design (Bonal et al., 2012). Impacts on school access are normally positive (because of conditionality) but are less definite in learning processes and educational performance (Reimers et al., 2006). The educational quality of the schools attended by the program’s beneficiaries and the living conditions of poor children are decisive factors preventing the expected effects of the transfer on learning (Tarabini, 2008; Bonal & Tarabini, 2010).

For its part, the impact of voucher programs on educational equity also presents mixed evidence, but the scale tips in favor of studies that show that vouchers increase segmentation of the education system according to the socioeconomic status of students (UNESCO, 2009; Waslander, 2010). In this sense, it is paradoxical that the Bank on the one hand defends the importance of equity for learning achievement, while on the other it advocates for voucher schemes and other market policies in education that most evidence shows as increasing education inequalities and school segregation. In any case, as occurs with CCTs, considering vouchers as a policy instrument that "works" or "does not work" is misleading, since their effects depend to a great extent on how these programs are designed and how the beneficiaries are selected (Levin, 2002). Instead of formulating over-simplistic bi-variable relations between policy interventions and outcomes, the Bank would benefit from formulating their impact evaluation questions in a more nuanced manner (i.e., what works for whom in what circumstances and how) (Pawson & Tilley, 1997), as well as from embracing qualitative methodological approaches to capture the importance of local regulations, preferences and social norms when it comes to understanding and evaluating the schooling experience of children (Fennell & Arnot, 2008; Klees, 2008).

WBES 2020 is also clear about the need for targeting policies to be inclusive enough to reach the poorest. The policy paper recognizes the need to look beyond the educational experience of children for the factors that prevent learning.

> Learning is not only about schooling. Investments in the nutritional and health status of very young children and the quality of their interaction with parents and caregivers determine the readiness of children to learn. Likewise, programs that address hunger, malnutrition, and disease among schoolchildren significantly improve their academic performance …. Indeed, learning is not simply the business of education agencies; it should also involve social welfare and/or social protection and health agencies in the design and implementation of policies across sectors that ensure young children have the foundational skills to succeed in school. (pp. 12-13)

The above statement acknowledges the importance of the effects of poverty on education. Actually, this relationship is powerful enough to reduce the potential positive effects of education to a fight against poverty (Bonal, 2007; Jones, 2006). However, the educational policy paradigm that has sustained the World Bank education policy over recent decades has in fact explicitly disregarded the effects of poverty on education. The reason for this is that human capital theory incorporates a view of education as a *cause* of development, and never as an effect of social and economic policies. For the Bank, conceptions of educational development have always been equivalent to educational investments, as a form of capital investment. This understanding of the role of education for development has not left room for other approaches that could question the universality of the principles of human capital theory. Consequently, if the Bank took the above assertion seriously, it would mean a real paradigm change in its educational policy strategy. It would mean also putting development before education, and understanding that education development is not only a cause of development, but also a consequence of development processes in multiple areas (economy, health, etc.). And that would mean connecting education to policies and outcomes in other areas of development with determination.

Educational development needs the adoption of a multi-sectorial approach that acknowledges that there are non-educational factors preventing learning. *WBES 2020* performs an interesting exercise by including all possible links between the education strategy and other Bank sector strategies (see Annex 3 of the Strategy). For each strategy the Bank tries to identify the education contributions to the sector in question and, vice versa, how other sectors contribute to education. But linking all sectors with education is not exactly developing a multi-sectorial approach. A real multi-sectorial approach should actually be included in the core of the policy paper and not in the appendix, and should be necessarily integrative. It should address aspects related to conditions governing the educability of children (López & Tedesco, 2002), i.e., identifying the minimum social requirements needed for a child to learn at school. If closing the learning gap requires poor children to learn, as the Bank states in several parts of the policy paper, the Strategy should concentrate on those social, psychological, material, or cultural factors that prevent poor children from taking advantage of their school experience. *WBES 2020* emphasizes mainly nutritional and health aspects as non-educational variables related to learning. But this is a reductionist interpretation of the multiple dimensions of poverty impacting on the learning conditions of children. Looking at the conditions of educability involves both a multifaceted understanding of poverty and the use of qualitative methods able to grasp the living experiences of children in diverse social spaces. It will be difficult to capture these elements using the quantitative cross-national studies or positivistic impact evaluations usually undertaken by the Bank.

CONCLUSIONS

WBES 2020 does not introduce significant policy innovations compared to the previous World Bank education strategies. In this document, the focus on systemic reform, learning outcomes, evaluation, and measurement, the key role of the private sector, and the importance of education as a key tool for tackling poverty and for reinforcing employment markets is formulated in a way very similar to previous Strategies.

Continuity would not be a problem if there were not serious limitations in some of the key analytical ideas behind the Strategy and in the policies it prescribes. The expression "all things being equal" in the title of this chapter refers not only to whether or not the World Bank is presenting substantial changes in *WBES 2020*. "All things being equal" is also a common expression used by the Bank economists to illustrate empirical evidence in education. As we have argued in this paper, the system approach defended by the Bank reflects its attachment to a disciplinary knowledge and to empirical methods that attempt to explain how variables behave in hypothetical contexts of "other things remaining equal." Yet, since learning is a highly contextually-based phenomenon, this form of empirical evidence is not the most appropriate way of explaining policies about how children learn at school and why.

Once again, the latest Education Sector Strategy reveals a strong faith in the superior efficiency and quality of market solutions and private schooling, which are causal beliefs that are not supported sufficiently by evidence. In fact, evidence rather shows that market solutions affect education equity purposes negatively. The latter observation precisely undermines the most significant conceptual innovation in *WBES 2020,* which is that of acknowledging education equity as a means of education quality and learning. We have also shown that *WBES 2020* fails to capture the complexity of the education and poverty relationship accurately, since it does not contemplate the multiple dimensions of poverty influencing the learning conditions of children.

In *WBES 2020*, the World Bank accurately considers that an inputs approach to education reform is too simplistic and insufficient, and that policy-makers need to pay more attention to the governance of education systems. However, this message should not be misunderstood as disregarding inputs, since education systems in most developing contexts are in need of increasing resources, sometimes urgently so. Furthermore, the emphasis on demand-side and managerial interventions could obscure variables (such as the peer effect, the educability conditions of children, or local education rules and norms) that are key to an understanding of student learning, and that are unfortunately absent in the 2020 Strategy "Learning for all."

NOTES

[i] The adjustment in lending generated the conditions for this to happen. SAPs meant that countries would have fewer resources available from public budgets for social services such as education. Consequently, they had to borrow from the Bank to cover their often-expanding education needs (Mundy, 2002).

[ii] In fact, the World Bank itself considers it to be de facto a primary sector strategy. See "Previous Education Strategies" in: http://go.worldbank.org/208ECTQCC0

[iii] The Sector Strategies were promoted with Wolfensonh's deep organizational reform of the World Bank (1996-2000). Before this reform, the Bank was organized accordingly to territorial criteria. As a consequence, the Country Assistance Strategies (CAS) were the organization's main strategic documents. Wolfensonh's reform introduced a thematic focus in the organization (via the strengthening of thematic research and thematic networks), and consequently the Thematic or Sector Strategies became an important political product within the Bank, at a CAS level (HDN, 2002; Nielson et al., 2006).

[iv] EKMS stands for Education Knowledge Management System and SABER for System Assessment and Benchmarking for Education Results.

[v] Word clouds have been created using the on-line application "Wordle." To strengthen the comparative power of the charts, we have not included words like World Bank, schools, countries or education.

[vi] See examples of how these techniques can be problematic to guide policy when used uncritically, in Glewwe (2002) or Klees (2008).

[vii] Interestingly, the 1995 Policy Review states that, in order to license a private school in Nigeria, "the proprietor must meet many ostensibly reasonable requirements (for example, showing that the school will be non-profit)" (World Bank, 1995, p. 123).

[viii] Interestingly, Figure 1 also shows how, with the passage of time, the "private" concept has gained terrain (to the detriment of the "public" one) in the World Bank policy discourse.

[ix] This affirmation is also valid for richer countries such as Argentina (see Santos 2007).

[x] See for instance Dupriez et al. (2008) and Hanushek et al. (2003) for evidence of the importance of some of these factors in explaining differences in student performance.

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