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ABSTRACT

The climate of growing dissatisfaction in the developing world seems to have led to some changes in the World Bank's main discourse. The current World Bank president, James Wolfensohn, pointed out the existence of a "human crisis," besides the overemphasized financial one. He proposed a new development framework taking into account the widening poverty gap, the increase in unemployment, as well as the growth in population, water scarcity, food security, and the danger of social unrest. In the area of education, a change of discourse included the fear of social unrest and the question of "social cohesion." This paper examines two contemporary World Bank publications in education and development: "Decentralization of Education: Demand-Side Financing in Education" (Patrinos and Ariasingam, 1997/1999) and "Assessing Aid: What Works, What Doesn't and Why" (Dollar and Pritchett, 1998). The paper states that if these two documents are not an "official view" of the World Bank concerning education and development, then the education policy paper entitled "Education Sector Strategy" (World Bank, 1999) cannot be denied as an official and recent World Bank document showing the organization's educational agenda. It examines in detail this third document. It notes that many documents mentioned in World Bank publications as a base for their work continue to be kept in secrecy, inaccessible to the public. It also finds that a deep historical perspective is lacking in the 1999 document, and that the World Bank's Educational Knowledge Management System seems to be an attempt to foster the commodification, sterilization, and standardization of knowledge, constituting a peril to democracy. (Contains 11 references.) (BT)

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The World Bank New Discourse and The 1999 Education Sector Strategy

*Angela C. de Siqueira**

International concerns with the growth of the poverty gap have generated several demonstrations against the current, dominant “financial economic” discourse, in which all developing countries’ problems are dealt with as a matter of bad management, lack of freedom for capital flight and accumulation, and so forth. In fact, this dominant discourse prescribes the need for the adoption of harder economic measures, such as inducing production for exportation, opening markets, reducing State support toward social programs, promoting massive public service dismissals, and privatizing/denationalizing national enterprises, public sector owned banks, social security, and basic service suppliers (water, electricity, roads, etc). Worldwide consequences, mainly in the developing world, are: a crescent cost of living, huge unemployment, hunger, poverty, and the spread of earlier controlled diseases, along with the transformation of new ones, such as AIDS, to epidemic proportions in some regions of the world.

The climate of growing dissatisfaction seemed to have pressed on toward some changes in the World Bank main discourse. The current World Bank President (Wolfensohn, 1998) pointed out the existence of a “human crisis,” besides the overemphasized financial one. He proposed a new development framework taking into account the widening poverty gap, the increase in unemployment, as well as the growth in population, water scarcity, food security and the danger of social unrest. He called this view “Comprehensive development framework” (Wolfensohn, 1999).

In the area of education, there was a change of discourse to include the fear of social unrest and the question of “social cohesion.” The idea, expressed by a member of the World Bank educational team, was that schools should teach what the laws are, give examples of those countries and groups which follow the laws and the consequences and penalties for those which disobey them (Heyneman, 1998).

Other contemporary World Bank publications in education and development aid are: “Decentralization of Education. Demand-side financing in education” (Patrinos and Ariasingam, 1997/1999), and “Assessing Aid: What works, what doesn’t and why” (Dollar and Pritchett, 1998).

The main argument used in the first document (Patrinos and Ariasingam, 1997/1999) is that the usual government’ “supply-side” approach-- that is to offer education generally -- has led to an expansion of the number of schools and teachers. However, the authors claim that this same supply-side approach has been inefficient due to misallocation. They point out that many countries that should be investing in basic education serving the most needy groups (girls, rural population, indigenous groups), instead continue to “oversubsidize higher education” (p.1). Moreover, it is also claimed that public teachers are paid, even if they do not attend class (p.5). In addition to these “inefficiencies,” the authors also cite the question of budget constraints and the inability of governments to bear the costs of an expanding public education system (Patrinos and Ariasingam, 1997/1999, p.2).

Thus, demand-side financing presents a clear defense of all forms of transferring public money to individuals and private institutions; such as vouchers, charter schools, NGO-

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international Aid agreements, student loans administered by commercial banks and treated like any other commercial debt, etc. These mechanisms are certainly based on Friedman's ideas of "choice" (Friedman, 1961/1982; Friedman and Friedman, 1980).

The assertion that "money should follow students" provides the base for defining public allocation or teachers' salaries based on the number of students enrolled or in attendance. Despite all the rhetoric of benefiting the poor and those excluded from the regular system, created by the "demand-side" approach, there is no real social concern. It is affirmed within the document that the "focus is on the individual" (Patrinos and Ariasingam, 1997/1999, p.3).

The document also brings out several statements arguing in favor of market and private-driven education, claiming that most beneficiaries would be the poor, as can be seen in the following quotes:

[C]hoice will generate greater competition and therefore improve school efficiency and achievement.

[O]ften, it is the poor who would benefit most from the opportunity to choose schools. Most studies find that public education is more costly than private education.

The market system satisfies privates' tastes and is slightly superior in terms of student achievement. (Patrinos and Ariasingam, 1997/1999, p.7-8)

Notwithstanding, it could be argued that if public schools had enough support, both in poor and rich areas, there would be no need for these "choice" schemes. Support could be provided by qualified, motivated, satisfied and well-paid teachers, and by the development of interesting and challenging curriculum departing from the students' reality, and presented in a pleasant and receptive environment. Another factor that could improve education in public schools would be if students and parents had conditions to keep up with the demands of

Intrnational/Intercultural Developmen Education Program, Florida State University, with full scholarship from

schooling (books, time and place to study at home, extra activities that kids from rich families have, such as travel, theaters, movies, summer vacations and so forth). The same quality education would be assured to all, but departing from their own realities, surpassing them and always articulating the local and the global and vice-versa, while expanding their curiosity and natural inclinations be them for arts, sciences, composition, etc.

The other World Bank publication, “Assessing Aid”, is a World Bank Policy Research Report. This Report, in brief, demands the assurance of a managerial, financial and project framework in order to provide aid and grant money disbursement. In the absence of such commitments, aid should consist of heavy propaganda to influence opinions and make countries more receptive to the World Bank team’s desired commitments.

In countries with poor policies, donors should concentrate on activities that might support reform in the long run—overseas scholarships, dissemination of ideas about policy reform and development, and stimulation of debate in civil society....
[T]he role of international institutions should be to disseminate information that might influence public dialogue about policy reform—and to learn to read the signals about whether governments are serious or not [about the commitment to reform]. (Dollar and Pritchett, 1998, p.58-59).

Meanwhile, the World Bank has also created a new service called Education Investment Information, or EdInvest, with Harry Anthony Patrinos, the “demand-side” economist, as coordinator. EdInvest renews the assumption of the government’s lack of financial resources to expand and even offer education for all and at different levels; thus, this World Bank “service” advocates that this task would be better accomplished by the private sector, which is willing to assume this new educational business.

CAPES.

[G]overnments' financial ability to further expand and improve education is limited. At the same time, private sector interest in investment in education is growing. Today, many developing countries welcome foreign investment in education, especially when it brings innovative technologies and approaches. Private sector investments in education are growing in all regions of the world and especially in low-income countries. (EdInvest, 1999).

Thus, more than ever, education is dealt with not as a human and social right; but as a commodity counting on multilateral institutions' financial and ideological support through the joint efforts of the International Finance Corporation (IFC) and EdInvest, as it can be seen in the following quotations:

Who Will Benefit from EDINVEST? Education companies exploring global investment opportunities; Schools and training institutions looking for investors; Corporations, including technology firms, trying to build more of a presence in developing countries; Non-governmental organizations; International banks; Other Investors.

The IFC has sponsored a Global Study of investment opportunities in education. This initiative builds on the results of the Global Study. IFC investments in education are increasing, and World Bank Group clients are also looking for greater facilitation for private sector development in education. (Edinvest, 1999, italics added)

If these two previously mentioned World Bank documents were not an “official view” of the Bank concerning education and development, then the 1999 education policy entitled “Education Sector Strategy” (World Bank, 1999), cannot be denied as an official and most recent World Bank document showing its educational agenda.

The 1999 Education Sector Strategy and the Knowledge Management Bank

It is interesting to mention that the procedures for the making of the 1999 World Bank study were not broadly divulged. Even among educators used to dealing with and following the making of education policies, there was a kind of surprise in learning that a new policy paper had been approved.

Whereas the prior World Bank education policy paper carried a monetarist-cut-cost approach (World Bank, 1995), the 1999 education policy paper supports an extremely commercial one. The new document is not so concerned with cost-benefit analyses and/or improving government managerial capacity. Although these issues are still important, the main aim seems to be helping to open the education sector as a new business venture to private commercial education firms. The document continues to endorse the earlier emphasis on basic education, as well as advocates a market-based offer for ulterior levels, teacher training instead of formation, new technologies as the leading feature for curriculum reform, and so on.

The trend toward generalization is also present in this document as can be seen in an excerpt from James Wolfensohn taken from “Comprehensive development framework. This quotation can be found in the introduction of the 1999 education document:

All agree that the single most important key to development and poverty alleviation is education. This must start with universal primary education for girls and boys equally, as well as an open and competitive system of secondary and tertiary education. Construction of schools, modern curricula geared to the new technological age, and the real needs of the emerging local market, and effective teacher training and supervision all contribute to successful educational programs. (World Bank, 1999b, iii, italics added).

“Effective teacher training” seems to be defined as distance education and using the Internet. Indeed, the Bank mentions three sites, which support the idea of letting technology reduce educational costs and train teachers. This is what is called “innovative delivery” and the sites are <www.worldbank.org/depweb>, <www.globaldistancelearning.com> and <www.worldbank.org/worldlinks>

The document lists the main areas of systemic reform that the Bank is going to support:

- 1) Standards, curriculum and achievement assessment; 2) Governance and decentralization; and
- 3) Providers and financiers outside the government. The report reads:

[T]o encourage developing countries to establish standards for what students should know ..., to develop good national assessment system, to develop training courses for policymakers and agency staff on what works and what doesn't and how to implement reforms.... [to foster this goal] the Bank will make available former education ministers and other high-level officials, detailed case studies of successful country experience, a website featuring global research on education reform..... [Concerning providers outside the government] the Bank will create an Internet information exchange highlighting investment opportunities in education in client countries (www.worldbank.org/edinvest). (World Bank, 1999b, ix-x, italics added)

These areas for reform will contribute to taking control and autonomy over academic work from students, parents, teachers, schools and community. As a consequence, the academic work will thwart the existence of references to and linkage with the local reality and peoples' lives. There will be an immense outside influence controlling what must happen inside classrooms, what must be taught and at what pace it must be done to be measured at a specific time and date. These reforms also aim at selling services; that is educational advice of the "best" experience. Another important objective is to foster all forms of privatization, including the use of the Bank's privatization branch, the IFC.

The 1999 education sector document reinforces an openly commercial approach, in which countries are named as "clients," and education is to be "delivered" as a package like any other consumer good. In fact, the World Bank's lending to and working in countries, is referred to as "the Bank's education business" (World Bank, 1999, p.37). Thus, education is not treated as a human and social right, nor as a profound and extensive process of observing, reading, writing, confronting, analyzing, proposing alternatives or questioning; but as a fast and disposable topic,

that can be delivered to your home, by any educational enterprise of your “choice”, with more affordable prices. In fact, there is great emphasis on new technologies.

Indeed, the document carries a kind of admonition to countries to follow this trend, the “smart ones”; and suggests a dire perspective for those countries disconnected from this technological-informational tendency, considering them as the old-fashioned, ignorant, inferior, weak, backward, unprogressive, unwise ones. The following paragraph summarizes such a view:

The choices countries make now will have long-term ramifications. Those who respond astutely will make progress, those who do not risk falling behind. Disparities in education are already huge—many countries are still struggling to provide basic books, blackboards and buildings, while a few are rapidly adopting new information and education technologies. (World Bank, 1999 ,vi. Italics added)

Still reinforcing the assumptions of the governments’ limited funds and bad management, the 1999 Education Sector Strategy (World Bank, 1999) advocates the transference of public funds to private institutions as well as the belief that families and communities should bear an increased part of the education costs. Although there is the perception that the previously advocated “growth of enrollment at low costs and with low quality courses and fast trained teachers” did not bring about good results, the role of the World Bank projects and “advice” were not pointed out, nor were the international trade, financial, environmental, political, economical-related issues. On the contrary, countries’ internal problems, such as lack of innovation, managerial capacity and resources continued to be the focus of blame:

Inequities persist and certain groups—especially females, minorities and the poor—are disproportionately excluded. Dropout rates are high in many regions, with only two thirds of children who start school staying to the fifth grade. Many children in school receive teaching of low quality, based on an outmoded and inappropriate curriculum. The result is poor achievement in test scores and unemployed graduates with the wrong skills (World Bank, 1999, vii, italics added).

Another tendency that the document reinforces is a fragmented view of education, such as that of "development", in terms of stages or gradual steps. In fact, the document states that it is necessary to listen to the "client," but at the same time it establishes steps to be followed by countries or regions. The idea behind "these gradual steps" is that countries must begin with basic education and only go further when this level is fully accomplished.

However, the definition of priorities cannot be done *a priori* --the gradual steps-- by Bank personnel presenting as an argument a reduced and distorted view of the original Education for All initiative. Certainly, countries and workers have always fought for education for all at all levels, as a human and social right. Thus, the strategy is not offering education by steps, but to all levels. However, to provide all levels will take time and many more resources. Resources exist, but more and more often they are concentrated in the hands of a few, who continue prescribing additional cuts and further austerity. They allow only minimal "concessions", such as basic education, to avoid population growth and social unrest. They also want to have people linked on the Internet, ready to take part in the e-trade, and buy goods produced outside their own countries. The national production capacity of each country shall not exist or be developed in full, but only at a minimal level or in areas that have a "comparative advantage." As a result, the poor will never be able to have advanced technology and develop science and technology related to their social, cultural, environmental, religious, ethnic and political environment.

Who are the "clients" who must be listened to in this commercial/market-driven approach? Are they only those in governmental position, mostly like-minded officials, educated in economics, education assessment techniques and so on, mostly at American universities or taught in some courses offered by the World Bank?

Are those who work with education -- teachers, students, parents and all the national/local indigenous academic researchers -- who think about it, face its everyday problems and try to find solutions, to be ignored as usual? All of them seem to continue being ignored/discarded/dismissed as active intellectual actors. This is because they see the world from another perspective; not that one advocated by the Bank and based on quantification/costs, qualification reduced to tests or rates or approval/retention, distance learning or teacher qualification as in-job training, but based on human rights and dignity values, through the observation of the local reality and its daily problems, aiming to "read the word, to read the world" (Freire, 1965/1997 trans.) or to educate people in order to place them "in a government position or in control of those in a decision-making position" (Gramsci, 1929/1997). Education is not to serve the "world of work". In fact, what world is this, if there is shrinking opportunity for people working: no jobs, no land, no money, no assets? Education is to empower them as citizen conscious of their rights as human beings, and with knowledge and ways to express their concerns, desires and needs. This means the need to offer opportunity and conditions to every human being to develop his/her potential as a "philosopher, an artist, a technician and a politician" (Gramsci, 1929/1997).

Certainly, education is a daily and life-long learning experience that begins when we are born, or even inside the mother's womb. If one think of education in general and the capacity to create, amass, challenge and recreate, and also how one level of education is --or must be-- intertwined with the other, the idea of gradual steps as the basis for a country's educational system cannot hold true. As a whole system, all parts must work and move together, as much as possible.

If the poorest countries only have projects approved through the "steps" defined by the Bank, they will need to import -- or wait for the "delivery service" to bring-- a full, expensive and decontextualized educational package, including foreign Ministers of Education, to their doors. This means, that the local capacity to create and propose curriculum, courses, evaluation (and not assessment or measurement) rooted in local reality will completely disappear, and more dependence will be created.

Isn't there a good strategy to foster an "investment/ business approach" for the education area, dealing with it as a new commodity in the commercial market? Isn't the "Knowledge Bank" an important representative of this new approach? Isn't the Bank ready to sell the "lessons of experience"; the "good projects"? As stated in the World Bank document:

Another important strategic goal is to continue to build The Education Knowledge Management System [EKMS], helping strengthen the Bank's role as a **knowledge** institution, able to generate, synthesize, disseminate and share global knowledge to get local results and provide high quality advice to clients. (World Bank, 1999, x)

Here it is worthwhile to mention that the "Knowledge Bank" does not have a policy to disclose all of its own policy documents, studies or internal documents. In fact, this difficulty was felt by the very group that wrote the last recognized and authorized biography of the Bank. (Kapur, Devesh, Lewis, John P and Webb, Richard, 1997).

In developing studies about the World Bank and education, several documents were deemed unavailable for public access, and the ones that were accessible were photocopied brochures, around 30 pages, costing US\$ 20.00 each, plus taxes and shipping and handling. So, the "Knowledge Bank" should at least be more open and let all its own documents be accessible to those interested, and at a low cost. Many documents that are mentioned in World Bank publications as a base for the work presented continue to be kept in secrecy, inaccessible to the

public. Therefore, it appears that the “Knowledge Bank” is only willing to promote the knowledge it wants to be adopted, such as those earlier studies about manpower, cost-efficiency, cost-effectiveness, cost benefits, regression and now, demand-side financing, vouchers, distance learning, etc.

In summary, there seems to be taking place a shift from a public sector accountability emphasis, based on cost-benefit analyses, to a retailer/marketing/seller framework, in which education is dealt with as a new commodity in the market of private services.

Moreover, with the fear of social unrest, the idea of the educational knowledge management bank, appears to create the illusion of openness and of democratization of the knowledge. In fact, the EKMS is much more a filter, which ignores contexts and acts as a controller of the knowledge gathered and distributed. The EKMS only provides fragmentary knowledge; a kind of market for fast delivery “knowledge services”. This is the kind of knowledge available. But the whole knowledge—complete reports or texts from authors and institutions with different perspectives-- is not offered in this “global knowledge Bank”. In fact, as the EKMS name expresses, it is a management system; and management implies control and selection, which is different than a broad, open, accessible and free public database, library or bookstore.

The 1999 education sector strategy must also be read with the mentioned on-line discussion about “attacking poverty”. In summary, this discussion reveals the fear the rich groups have of the increasing danger of social unrest as the poverty gap widens. Such on-line discussion also unveils the interest of these same groups in using, appropriating or controlling third world biodiversity, referred to now as our “shared resources”, such as water. Moreover, they also want

to transfer to the poor the responsibility of being able to survive with small amounts of resources and reduced government support and services. Thus, for the poor, the need is claimed to provide micro-credits and safety nets, while for the rich, the free flow and huge remuneration for financial capital, tax exemptions, regressive taxation, free land, evasion in fiscal paradises and use of accountability tricks, continues.

Following similar reasoning, the 1999 education sector strategy does not advocate big structural changes to reduce the growing poverty or economic and social apartheid in the world. In fact, the document reinstates its faith that education is the only way to take the “poor out of poverty”:

Education will determine who has the keys to the treasures the world can furnish. This is particularly important for the poor, who have to rely on their human capital as the main, if not the only, means of escaping poverty (World Bank, 1999, p.1)

Moreover, this Bank education policy paper seems to ignore the growth of homeless and street kids; there is only education for "families," who may live in poor houses. And what about those without houses; the poorest of the poor, the already disenfranchised in society?

In relation to poor countries, the “new Knowledge Bank” indicates that it intends to make things more difficult, or more expensive:

Some of the “minor” clients (such as South Africa) are in fact relatively large countries who at present only want non-lending services from the Bank. Here the question is whether to begin charging for technical assistance where it is not accompanied by lending—to avoid a situation where borrowing clients are subsidizing technical assistance to non-borrowing clients (World Bank, 1999, p.39).

Furthermore, in the 1999 education sector strategy, a deep historical perspective is lacking. Such a perspective cannot be confused with macro-economic analyses or statistical series presented out of a global/national context. What is missing is taking into consideration the

countries' perspective and experience in dealing with their problems; What is missing is knowledge about indigenous research and studies; What is missing is real dialogue; What is missing is an interest and a humble posture to learn and not to impose and sell "lessons of experience" coming from a distinct social and cultural milieu. What is missing is money, because most countries have the capacity and perspective of what they need, such as a financial support to go ahead and develop their own research and experiences, and not a "knowledge (the wiser) Bank" avid to sell services.

Likewise, not a word is mentioned about the previous accumulation process -- that is, how rich countries became rich; not a word about how "development" has contributed to creating poverty, environmental depletion and helping the rich (national and international groups) to become richer by the construction of airports, hydroelectric power plants, dams, as well as selling products, consultants, etc; not a word about the continuously unfair terms of trade, with quotas/ tariffs on primary products when poor and developing countries were the main producers.

There is not a word about how debt was made and the exorbitant increase in interest rates, contributing to the debt explosion. Not a word about the adoption of the structural adjustment loans (SALs) and the huge transfer of money during the 'lost decade', the 1980s, when the poor countries transferred to rich countries what was the equivalent to six Marshall Plans. There is also not a word about World Bank's advice and declared need for countries to foster production for exports and to adopt cuts in budget affecting most social areas; this in the detriment of people's nutrition, health, education and well-being. At the same time measures helping to expand the benefits of the rich such as regressive taxation, tax exemptions to multinationals, as well as tax evasion in fiscal paradises and offshore places, lending schemes to save multinational

private banks were regarded as good to foster development, improve countries economy and reduce debt.

There is not a word about the transformation of debts with private multinational banks into debts with multilateral institutions; that is through the SAPS, multinational private banks got their money back, while debtor countries saw their debts continuing to grow despite having made large amount of payments and, and as a result became more dependent on multilateral banking development institutions, which hold the debt and use it as leverage to foster some specific projects and views. There is also not a word about the debt for equity swap schemes, helping the privatization of public national enterprises and services at a cheap price, generating denationalization and creating the perspective of fiscal imbalance in the future due to permanent occurrence of capital transfer.

There is also not a word about the effects of the pressure and sanctions for opening markets, leading to the destruction of many national/ local businesses, as well as widespread unemployment and increased dependence on the supply of basic food. Finally, there is not a word about the consequences in following the unique solution presented as the way to reach development based on the idea of “comparative advantage”, which is generating deeper exploitation of nature, causing the removal of people from their traditional lands, water and air pollution, as well as the destruction of native species. In summary, this comparative advantage is only creating more dependence, poverty and endangering life on our planet.

Thus, if all this national capacity, natural resources, and money sent abroad or lent were available, it would be ample enough to promote an authentic and integrated development: social,

economic, cultural, technological and political. However, now countries are financially weaker and more dependent than ever.

Based on the 1999 education sector strategy and contemporary World Bank documents presented here, it seems that the education area will reinforce such dependence trend. Indeed, it seems that the main target is to create intellectual dependence and impose a one-sided solution and view of the world, by eliminating the possibility for the emergence of alternative perspectives.

In summary, the Knowledge Management Bank and its Education Knowledge Management System seem to be an attempt to foster the commodification, sterilization and standardization of knowledge. Therefore, it constitutes a serious peril to democracy, which presupposes diversity and not homogeneity.

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