

An Educator's Guide to the WDR 2018

A guide to the World Bank's approach to education policy - as articulated in the 2018 World Development Report (WDR), *Learning to Realize Education's Promise* - for teachers and education support personnel



Education International
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The World Bank (the Bank hereafter), as well as being one of the biggest funders of education programmes, is a hugely influential provider of technical advice to education ministries around the world.

The Bank's policy advice and influence through conditional loans have an effect at a global and national level but also at a classroom level. Therefore the Bank's education policy influences your working conditions and classroom reality. It affects you, as an educator.

The WDR 2018 is the Bank's nearly 300 page analysis and recommendations of how to solve the so-called 'learning crisis' in education. It is relevant to take note of as the report's advice acts as an overview of the Bank's policy position and also of the dominant policy discourse in the global education space.

This guide supports educators and their unions to unpack the meaning and implications of the WDR and provides guidance on how to respond to the report in order to further the campaign for, equitable, free, public quality education for all.

Though in some areas the report appears to have adopted a more progressive policy approach than previously taken by the Bank, this is unfortunately contradicted and overshadowed by the Bank's hypocritical practices which are detrimental to the interests of the profession, quality education and equity.

The report fundamentally shows that the Bank has failed to learn from its past failures and continues to offer policy advice without listening to educators.

We call on educators to challenge the Bank's problematic advice, and ultimately, to challenge the legitimacy of the Bank's role in education making. The Bank's influence on government policy is undemocratic. Education policy should be developed nationally through dialogue between governments and the ultimate education experts - educators themselves.

We ask you to raise your voice.



1. Introduction

Who is the World Bank?

The World Bank (hereafter referred to as the Bank) has two clear stated missions:

1. **To end extreme poverty** – by reducing the share of the global population that lives in extreme poverty to 3 percent by 2030
2. **To promote shared prosperity** – by increasing the incomes of the poorest 40% of people in every country.

The Bank has 189 member countries, including low, middle and high income countries. Whilst opinions vary on the impact of the Bank's influence, there is clear consensus that the Bank is a highly influential and powerful institution, not just because of its financial strength and lending power, but also because of its "knowledge products" and policy advice.

What is the World Bank Group?

The World Bank Group has been led Jim Yong Kim since 2012 and has its headquarters in Washington DC. It is formed of 5 organisations:

1. The International Bank for Reconstruction and Development (IBRD); and
2. The International Development Association (IDA)

These two organisations are what are known as the 'World Bank', which provides financing, policy advice and technical assistance to governments in middle-income and poor countries respectively;

And:

3. The International Finance Cooperation (IFC);
4. The Multilateral Investment Guarantee Agency (MIGA) and
5. the International Centre for Settlement of Investment Disputes (ICSID).

These three organisations engage the private sector. They provide financing, technical assistance, political risk insurance and settlement of disputes to private enterprises.



In fact, the Bank itself sees its policy work as just as important as its financing work. However, it is essentially impossible to reconcile these two roles; the Bank's research is portrayed as being impartial, yet it can also be seen as creating, reinforcing and serving to mandate the Bank's policy

The World Bank's Education Strategy 2020

'Learning for All Investing in People's Knowledge and Skills to Promote Development' (2011) outlines the Bank's strategy in the field of education until 2020. To meet the goal of learning (not just schooling) for all, the strategy is to: "invest early, invest smartly, and invest for all." This involves focusing on investing in foundational skills in early childhood; investing 'efficiently' to ensure improvements in learning gains; and investing with a focus on equity.

Though appearing to prioritise both quality and equity in education, the strategy shows that the Bank's perspective on education policy continues to focus on the economic benefits of education. Standardised testing and private schooling are given as key mechanisms to ensure learning.

Find out more:

- World Bank Group (2011) *Learning for All: Investing in People's Knowledge and Skills to Promote Development*. Education Strategy 2020.
http://siteresources.worldbank.org/EDUCATION/Resources/ESSU/463292-1306181142935/WB_ES_ExecutiveSummary_FINAL.pdf
- Klees, S., Samoff, J., Stromquist, N. (2012) *The World Bank and Education: Critiques and Alternatives*. Sense Publishers (book)
- A must-read for those interested in academic critiques of the Bank's involvement in Education and Development. Book available at text sharing site Library Genesis:
<http://gen.lib.rus.ec/book/index.php?md5=553BB1B962BF35D3E97C38C96F4B6>

agenda¹.

The World Bank and Education

The World Bank is a key player in the education policy field. Its great capacity for research production coupled with its power and influence through financing mean that it not only gives advice but also drives policy production.

As education is vital for development, the Bank's involvement in the field of education goes back many years. Between 2000 and 2017, the Bank invested more than \$45 billion in education, with \$2.85 billion spent for the fiscal year 2017². Its involvement is fuelled by the understanding that

¹ Klees, S., Samoff, J., Stromquist, N. (2012) *The World Bank and Education: Critiques and Alternatives*. Sense Publishers p. 49

² <http://www.worldbank.org/en/topic/education/overview#3>



education is a driver of economic prosperity through human capital. Human capital theory sees the value of education in terms of its rates of return – ie. to what extent the investment made in education is paid off through individual's increased earnings and a country's increased economic growth.

The Bank is “committed to helping countries to reach Sustainable Development Goal 4 (SDG 4)”, and is a signatory for the Education 2030 Framework for Action. It claims that “to make this vision a reality, the World Bank Group is mobilizing all available resources”³. Its work in education is guided by the [Education Strategy 2020](#) (see box on p.5) and includes financing of projects, impact evaluations, tools that track performance and research, mainly in developing countries. However, according to critics, the Bank's policy advice has contributed to the education crisis it aims to solve⁴. The Bank's major focus areas in education are in: early childhood education (ECE), teacher policy, girls and women's education, education for skills, and promotion of results-based financing. The senior director for education is Jaime Saavedra, previously minister of education in Peru and academic.

Find out more:

- [Edwards Jr, D. B. and Storen, I. \(2016\). The World Bank and educational assistance: history, theory, research. Oxford Research Encyclopaedia of Education. Oxford University Press](#)
This paper gives a clear and useful overview of the history and trajectory of the Bank's involvement in the educator sector
- [Komatsu, H. and Rappleye, J. \(2017\). A new global policy regime founded on invalid statistics? Hanushek, Woessmann, PISA, and economic growth, Comparative Education, 53:2, 166-191, DOI: 10.1080/03050068.2017.1300008](#)
Komatsu and Rappleye show that one of the central arguments backing the World Bank's policy reforms – Hanushek's evidence that higher outcomes on global learning metrics such as PISA leads to economic growth - is flawed

What is the WDR?

The WDR is one of the Bank's key knowledge products and a “major analytical publication”⁵. The first WDR in 1978 was ‘credibly claimed as the most widely read document in development economics’⁶ and it continues to be a highly influential publication. Not only does it guide the Bank's own policy formation, but the report serves to advise governments in developing

³ <http://www.worldbank.org/en/topic/education/overview>

⁴ Klees, S., Samoff, J., Stromquist, N. (2012) *The World Bank and Education: Critiques and Alternatives*. Sense Publishers p. 49

⁵ <http://www.worldbank.org/en/publication/wdr2018>

⁶ Toye 2009 in Edwards Jr, D. B. and Storen, I. (2016). The World Bank and educational assistance: history, theory, research. *Oxford Research Encyclopaedia of Education*. Oxford University Press



countries, particularly finance ministers. Every year a different theme is chosen; this is the first time that education has been the topic of the report.

According to the Bank, the WDR is an “invaluable guide to the economic, social and environmental state of the world today. Each report provides in-depth analysis and policy recommendations on a specific and important aspect of development”. Furthermore, “through the quality and timeliness of the information it provides, the report has become an influential publication that is used by many multilateral and bilateral international organizations, national governments, scholars, civil society networks and groups, and other global thought leaders to support their decision-making processes”⁷

Recent previous themes have included, *Governance and the Law* (2017) that looks at why bad policies so often endure, *Digital Dividends* (2016) that analyses the potential impact of the internet on development, and *Mind, Society and Behaviour*, that shows how a richer view of behaviour can help achieve development.

After 40 years of publications, it was high time that the WDR focused on education. By focusing the WDR on the education sector, the Bank shows that it values education as a key driver of development. Some hope that this could help the sector at a time when, despite the replenishment of the Global Partnership for Education in 2018, bilateral aid to education is low⁸.

⁷ <https://openknowledge.worldbank.org/handle/10986/2124>

⁸ See: <https://gemreportunesco.wordpress.com/2016/04/25/aid-to-education-has-again-gone-down/>

SABER

Systems Approach for Better Results (SABER) is a World Bank Initiative that aims to strengthen education systems through measuring and comparing education systems against a series of standards. Countries are measured in 13 aspects related to their education systems, such as education financing, student assessment, teachers and engaging the private sector. Countries are found to be 'latent', 'emerging', 'established' or 'mature' according to indicators of a good education system.

This is a highly problematic initiative for multiple reasons. Firstly, the initiative measures countries according to a rubric which is defined by the Bank, and reflect the Bank's own policy priorities. For example, systems are considered to be doing well if 'there are multiple mechanisms to evaluate teacher performance' and they are 'promoting a diversity of supply' of private schools. Education is characterised as a consumer good rather than a public good and human right.

Secondly, the initiative compares diverse country's education systems, against a 'one-size fits all' blueprint of 'what works' for quality education systems. Aside from the difficulty of gaining data on systems so that can be meaningfully compared with one another, this approach neglects to take into account contextual and cultural differences, and the fact that 'what works' in one place, may not be the best policy in another.

Thirdly, the measurement of countries' progress towards these World Bank 'policy goals' is highly likely to portray a simplistic and limited view of the policy reality. The reality on the ground (and the implementation of the policy may be very different to the portrait of the

Find out more:

- The World Bank. 2013. What Matters Most for Teacher Policies: a Framework Paper. SABER Working paper series.
http://siteresources.worldbank.org/EDUCATION/Resources/278200-1290520949227/7575842-1365797649219/Framework_SABER-Teachers_Apr.13.pdf

The WDR is a research think-piece written by a team of World Bank staff (mainly economists). It uses external research sources as well as background papers written by the Bank's in-house staff. However, critics suggest that the Bank is prone to using a limited selection of research in terms of disciplines, methodologies and authorship. Research from the global North is favoured, as is economic research and studies in education that uses quantitative methodologies, particularly large scale RCTs (randomised controlled trials).

To inform the preparation of the WDR, the Bank engages in consultations with organisations, experts and civil society groups in different parts of the world. The consultations include both face-face sessions and an on-line forum. However, the Bank has no obligation to actually take



into account the inputs and suggestions made at the consultations, making them seem more like an exercise to garner buy-in rather than a true consultation.

Find out more:

- Download previous reports: <http://www.worldbank.org/en/publication/wdr/wdr-archive>
- Read the background papers to the 2018 WDR: <http://www.worldbank.org/en/publication/wdr2018/brief/world-development-report-2018-background-papers>
- Menashy, F and Read, R. 2016. Knowledge Banking in Global Education Policy: Bibliometric Analysis of the World Bank Publications on Public-Private Partnerships. *Education Policy Analysis Archives*. 24:95 pp. 1-29

This paper shows the limited nature of the World Bank's research/ers on PPPs. It is found that the World Bank's research production is predominantly from the Global North, reflecting a disproportionate economic disciplinary focus, but also that the cited authors represent a narrow network, predominantly from US elite universities.

What is the Global Partnership for Education?

The Global Partnership for Education (GPE) is a “multi-stakeholder partnership and funding platform that aims to strengthen education systems in developing countries in order to dramatically increase the number of children who are in school and learning” (see GPE website).

It was established in 2011, emerging from the ‘Education for All - Fast Track Initiative’(EFA-FTI), which had been operating since 2002. Whereas in the EFA-FTI, decision-making power was clearly held by bilateral donor countries and the World Bank, the GPE aims for a more collaborative, equitable partnership between multiple actors including developing countries, donors, civil society organisations, international organisations, foundations, youth and the private sector. In particular, the GPE aims to ensure country ownership over education sector plans and use of grants. However, regardless of the discourse of partnership that characterises the GPE, power asymmetries akin to those seen in the EFA-FTI remain and the World Bank’s strong influence within the GPE continues.

The GPE has five objectives for its 4 year plan until 2020: to strengthen education sector planning and policy implementation; support accountability through inclusive policy dialogue and monitoring; and ensure efficient and effective delivery of GPE support (at a country level); and to mobilise more and better financing and build a stronger partnership (at a global level).

In February 2018, the GPE held an international replenishment event in Dakar, Senegal, in which representatives from developing countries pledged to increase domestic financing for

Find out more:

- GPE website: <https://www.globalpartnership.org/>
- Framework for the EFA Fast track initiative: https://ec.europa.eu/europeaid/sites/devco/files/methodology-education-all-fast-track-initiative-fti-ec-guide-200403_en_2.pdf
- EI article on GPE replenishment 2020 by Jeff Pessi: https://worldsofeducation.org/en/woe_homepage/woe_detail/15709/reflections-on-gpe-replenishment-rhetoric-facts-questions-and-the-way-forward
- Menashy, F. 2017. Multi-stakeholder aid to education: power in the context of partnership. *Globalisation, Societies and Education*. <https://sci-hub.tw/10.1080/14767724.2017.1356702>

2. Overview: Key messages and summary responses

The WDR's message in a nutshell

The WDR is a long document of over 200 pages. Below is a very brief summary of the report's main messages. We also recommend reading the [report overview](#) (only 24 pages).

Learning to Realize Education's Promise focuses on what has become termed "the learning crisis". Though major progress in school enrolment occurred following the Millennium Development Goals (MDGs), attention from the international community has now been turned to learning rather than just enrolment, as it has been found that millions of children who attend school are not learning – after years in school they are still unable to read, write, or do basic mathematics. The report examines the dimensions and drivers of this crisis, and provides policy guidance on how education systems can be reformed to improve learning.

The Bank identifies its [main messages](#) as the following:

The Learning Crisis:

- Schooling is not the same as learning
- Schooling without learning is not just a wasted opportunity, but a great injustice.
- There is nothing inevitable about low learning in low- and middle-income countries.

The Three Dimensions of the Learning Crisis

1. The poor learning outcomes themselves.
2. The immediate causes:
 - Children arrive unprepared to learn.
 - Teachers often lack the skills or motivation to teach effectively.
 - Inputs often fail to reach classrooms or to affect learning.
 - Poor management and governance often undermine schooling quality.
3. The deeper systemic causes.

Three policy actions to address the crisis:

1. Assess learning, to make it a serious goal.
2. Act on evidence, to make schools work for learners.
3. Align actors, to make the system work for learning.



Find out more:

WDR 2018 press release: <http://www.worldbank.org/en/news/press-release/2017/09/26/world-bank-warns-of-learning-crisis-in-global-education>

Education International's response in a nutshell

The report was described by EI's general secretary, David Edwards, as a "superficial and incoherent effort" that "brushes over complex issues, oversimplifies recommendations and opts for broad generalizations that should make even the most well-intentioned finance minister scratch her head."⁹ As a rigorous synthesis of research it is deficient - the report unfortunately shows that the World Bank has continued in its tradition of presenting research evidence which reflects its policy agenda.

There are some notable recommendations made in the report, such as:

- teachers must be better prepared; they should be motivated to teach and compensated as professionals; high calibre candidates should be attracted to the profession;
- the critical role of early childhood education; and
- the admission that private schools do not necessarily deliver better results than public schools; and that the ultimate responsibility for fulfilling the right to education lies with governments (and cannot be outsourced to private providers)

However, overall the WDR's recommendations fall far too short to realize the global commitment to ensure inclusive and equitable quality education for all, as articulated in the UN's Sustainable Development Goal 4.

The report has certain major omissions, such as:

- A focus on the education financing crisis. Being produced by the largest Bank in the world, it is ludicrous that education financing does not take centre stage in the report, particularly considering the international focus on education financing in 2018 with the campaign for GPE replenishment.

⁹ <https://ei-ie.org/en/detail/15400/ei%E2%80%99s-initial-reaction-to-the-release-of-the-bank%E2%80%99s-world-development-report-on-education>

- A focus on the continued problem of access.

Most crucially, it provides many recommendations that are profoundly problematic and even contradict its own analysis of the problem, such as:

- Though the report suggests that teachers are key actors for quality education who face difficult working conditions, teachers' concern for improving their working conditions is depicted as oppositional to a focus on learning
- The report's simple, seemingly apolitical recommendation to "align" all actors implies a disregard of teacher and education support personnel's rights and the importance of social dialogue for improving education systems.

Furthermore, the WDR 2018 does not speak to the Bank's own stake in the field of education policy. The report takes a "systems approach", in which it looks at education systems through a wide lens – taking into account the actions and interests of numerous stakeholders that affect learning. However, this lens excludes the Bank itself, and the Bank offers no reflexive analysis of its own historical and current position and influence in relation to education.¹⁰ Indeed, the Bank, as the most prolific funder of education programmes and a key influence for education policy in developing countries, is largely responsible for the 'learning crisis' it professes to solve. The legitimacy of the Bank's advice is therefore questionable.

EI challenges all three of the report's key policy recommendations:

1. Assess learning to make it a serious goal - but assessments do not improve education

It is a fallacy that a sick person will be cured by measuring their temperature. Likewise, education is not improved simply by increasing the use of summative student assessments.

Quality education is broad and cannot be reduced to that which can be measured. It is a complex process, which demands quality tools, quality environments and most importantly, quality teachers.

2. Act on evidence to make schools work for all learners - but whose evidence?

To improve education we need to act not on evidence handpicked by the Bank, but on evidence that is context-specific, and generated through dialogue with teachers and support personnel. No foreign expert knows the education system better than those who live it every day.

¹⁰ Unlike the GEMR 2017/18, whose section on International Organizations includes a reflexive analysis on the GEMR's own role vis-à-vis accountability.



3. **Align actors to make the whole system work for learning - but imposed policies cause misalignment.**

Many low-income countries have for years suffered the effects of implementing the Bank's policy advice as a result of concessional loans, yet the WDR is silent on the Bank's own culpability as an actor contributing to the learning crisis.

Behind the Bank's rosy picture of alignment is a false consensus based on imposed policies. This undermines national sovereignty and democratic processes, including social dialogue.

Find out more:

- El's initial response to the report: <https://ei-ie.org/en/detail/15400/ei%E2%80%99s-initial-reaction-to-the-release-of-the-bank%E2%80%99s-world-development-report-on-education>
- Jefferson Pessi. Back to Basics. How the World Bank can finally get education right. Bretton Woods Project. <http://www.brettonwoodsproject.org/2017/09/back-basics-world-bank-can-finally-get-education-right/>
This blog was written by El's Jefferson Pessi in anticipation of the report's release. The article argues that the World Bank should go "back to basics" and return to financing established national education policy rather than developing it.
- El's "Reality Check" on the Bank's 2018 World Development Report on Education compiles the critiques of unionists and academics from around the world: https://issuu.com/educationinternational/docs/2018_ei_wdr_realitycheck_publicatio

Responses from other international organisations and civil society

Numerous organisations have released reactions, blogs and news items in response to the report. Below you will find links to some of them. Other civil society actors have noted the report's omissions and inconsistencies, as well as the Bank's problematic refusal to take into account the organisation's own role within the education sector and the "learning crisis".

Read other notable responses below:

Civil Society and academics:

- GCE-US: <http://campaignforeducationusa.org/press/detail/WDR>
- Oxfam: <https://medium.com/@OxfamIFIs/four-quick-takeaways-on-the-world-banks-education-report-8014ef8b301f>
- Action Aid: <http://www.actionaid.org/2017/09/reflections-world-development-report-learning-realise-educations-promise>
- Action Aid's right to education expert, David Archer, is interviewed on *El voices*: <http://www.un.org/apps/news/story.asp?NewsID=57749#.WdyhHmiCxPY>
- Prachi Srivastava (Associate Professor at the University of Western Ontario): <http://oxfamblogs.org/fp2p/the-world-banks-2018-world-development-report-on-education-a-sceptics-review/>
- Steven Klees (University of Maryland):



<http://www.brettonwoodsproject.org/wp-content/uploads/2017/12/At-Issue-A-critical-analysis-of-the-World-Bank-World-Development-Report-on-education2.pdf>

- Jeremy Rappleye and Hikaru Komatsu, writing for NORRAG: <http://www.norrag.org/critical-reflections-2018-world-development-report-learning-important-cant-world-bank-learn-hikaru-komatsu-jeremy-rappleye/>

International Organisations:

- World Bank (Tara Bateille): http://blogs.worldbank.org/developmenttalk/system-wide-education-reform-hard-it-possible?cid=EXT_WBBlogSocialShare_D_EXT?t=1
- GEMR (Global Education Monitoring Report): <https://gemreportunesco.wordpress.com/2017/09/28/learning-to-realize-educations-promise-a-look-at-the-2018-wdr/>
- UN news item including audio news where the report's authors (Deon Filmer and Halsey Rogers) discuss their findings: <http://www.un.org/apps/news/story.asp?NewsID=57749#.WdyhHmiCxPY>
- Brookings Institute: <https://www.brookings.edu/blog/africa-in-focus/2017/10/06/figures-of-the-week-africa-education-world-development-report-2018/>
<https://www.brookings.edu/blog/education-plus-development/2017/10/06/real-time-scaling-the-2018-world-development-report-and-getting-millions-learning/>
Brookings Institute also hosted an event entitled "Education and Learning for a Changing World", which you can watch here: <https://www.brookings.edu/events/education-and-learning-for-a-changing-world/>

3. WDR: missing the mark for quality education

Key issues, what to challenge, action to take, and further reading

In the lead up to the WDR, the World Bank published a concept note for the report which EI responded to by voicing concerns from the teaching professions and providing the Bank with recommendations from the profession of cross-cutting issues that needed to be addressed in the report if it was truly going to play a positive role in 'getting education right'. 10 recommendations were given:

1. Reaffirm education as a basic human right
2. Urgently increase access to quality education
3. Reject the disproportionate focus on learning metrics
4. Reject results-based financing based on test-results
5. Align the report with the Sustainable Development Goals
6. Make equity an absolute priority



7. Invest in trained, qualified, motivated and well supported teachers and education support personnel
8. Ensure social dialogue
9. Include a focus on financing
10. Caution against increased flexibility, innovation and adaptation

This section revisits these cross-cutting issues and outlines to what extent the Bank has heeded the advice of those who live education day in day out – educators.

Why the WB's inconsistencies must be revealed and interrogated

The Bank is well known for rifts between its knowledge products (theory) and lending activities (action). For example, in relation to teachers, [EI research](#) found that the Bank has a history of 'doublespeak'. When comparing the Bank's large portfolio of 'knowledge products' with its lending projects, the study showed that though the Bank took a neoliberal approach in its policy advice, it gave more value to quality teaching and teacher professionalism in the projects it financed.

When reading the WDR, it is therefore necessary to reflect on the possible disjunctures between theory and practice. Seemingly 'positive' advice must be approached with scepticism as a result of this disconnect; whilst the WDR may suggest a certain policy, the WB's own (past, present and future) work in the education sector might not follow this advice and may even contradict it. For instance,

- Though the report argues for context specific solutions, the Bank leads its standardised "rating" of education systems in developing countries: [SABER](#), advocating for "one-size-fits-all" solutions to improve education systems.
- Whilst the report's approach to private schooling is restrained, the Bank supports "low-fee" private schooling - most notably controversial Bridge International Academies, which provides poor-quality, for-profit education in Africa and Asia at unprecedented scale.
- Though the report argues that teachers are irreplaceable, the Bank supports Bridge International Academies, which replaces qualified teachers with tablets.
- Though the WDR shows the importance of early childhood nutrition for cognitive development, school feeding is not a focus area in its projects.

Furthermore, in reading the WDR, internal inconsistencies within the report itself can be found. For instance, though the report argues that teachers are the most important element in the education process, it simultaneously implies that teachers are unjustified demanding decent working conditions and pay, as these demands can be harmful to learning. Though it is shown that the best education systems attract the best candidates into teaching, the report also suggest that using cost-cutting solutions such as contract teachers can be a good option in the short term.

Finally, the WDR hypocritically does not recognise **its own role in causing the learning crisis** – through advocating for structural adjustment policies (SAPs) in developing countries.

It highlights where the WDR's message *does reflect what was called for by EI* and others in the education community, so that you can utilize these part of the WDR in your own campaigns, and lobby the Bank to follow its this advice in its own lending activities and programmes. It also highlights where the WDR *neglects to heed the advice of educators* – instead recommending policies that are detrimental to quality education and educators.

Ultimately, the WDR shows that **the Bank continues to recommend and impose policy that is ideologically-grounded rather than policy that is developed in consultation with**

Find out more:

- Find out more about the Bank's hypocrisy in the WDR in a blog post by Francine Menashy:
https://worldsofeducation.org/en/woe_homepage/woe_detail/15505/wdr2018-reality-check-1-a-guide-to-reading-the-rhetoric
- Mundy, K. and Menashy, F. (2014). The World Bank and Private Provision of Schooling: A Look through the Lens of Sociological Theories of Organizational Hypocrisy. *Comparative Education Review*, 58(3), 401-427.
- Clara Fontdevila and Antoni Verger. 2015. The World Bank's Doublespeak on Teachers: An analysis of ten years of lending and advice. *Education International*.

educators.

1. Reaffirm education as a human right

Disappointingly, though the Bank affirms education as a human right in passing, it fails to take a rights based approach to education.

The first page of the report states that “education is a basic human right, and is central to unblocking human capabilities” (p.1), referring to the capability approach developed by Amartya Sen.

It is a welcome change to see the World Bank finally going beyond the narrow instrumental (economic) argument for education based in the human capital approach, and recognizing that education is an inalienable human right.

However, simply recognising the fact that education is a moral duty and a right under article 26 in the 1948 Universal Declaration of Human Rights is not the same as taking a rights based approach.

Taking a rights based approach involves pushing for compulsory and free primary and secondary education and accessible and progressively free early childhood and further education. It



necessitates the understanding that states have the obligation to protect, respect and fulfil the right to education; so accountability for the right to education has to start with national governments. According to the first UN special rapporteur on the right to education, Katarina Tomasevski (2001), for the right to education to be fulfilled, education must be available, accessible, acceptable and adaptable.

The WDR does not take this approach. On the contrary, repeated references to education as an investment (for example – early childhood education is presented as an early investment that pays dividends for a child’s future learning) and the report’s lack of explicit support for public education, suggests that the Bank’s recognition of the right to education is no more than a passing comment.

ACTION:

Lobby the Bank to conceptualise quality education as an entitlement for all rather than as an investment (which may or may not be seen to make economic sense). Join with others to hold your government accountable as the duty bearer of the right to education.

Find out more:

- Menashy (2013) Interrogating an omission: the absence of the rights based-approach to education in the World Bank discourse. *Discourse: Studies in the Cultural Politics of Education*. p749-764.
<http://www.tandfonline.com/doi/abs/10.1080/01596306.2013.728368> 34:5,
This article demonstrates the Bank’s longstanding neglect of the rights-based approach to education in its discourse.
- Alston (2015). Report of the UN Special Rapporteur on extreme poverty and human rights. http://www.un.org/en/ga/search/view_doc.asp?symbol=A/70/274
- The Right to Education Project <http://www.right-to-education.org/page/understanding-education-right>
This organization promotes accountability and mobilization on the right to education

2. Urgently increase free access to quality education

The report gives scant focus to the continued crisis in access to education for the most marginalised. It does not include research that shows the risks posed by using public-private partnerships as a means to improve access to education.

The WDR’s analysis of the “learning crisis” rightly highlights that the crisis disproportionately affects the poorest and most marginalised, including children in fragile or conflict affected areas (see p. 61). It stresses that often resources are inequitably distributed and the poorest suffer.

However, the report’s narrow focus on learning downplays the continued problem of access to education.



There is ample evidence that access to education has not yet been achieved – 263 million children remain out of school. Progress in enrolment has now more or less stalled, and it is the most vulnerable that continue to be left out. SDG 4 refers to quality education *for all*, therefore the international community must focus not only on learning, but access + learning.

The WDR does recognise that this is a continued challenge – stating that “exclusions based on poverty, location, gender, and ethnicity persist” (WDR, p. 60) – but the lack of in-depth analysis on this topic is shocking and problematic.

Worryingly, the report even suggests that it is the “learning crisis” that is causing reduced enrolment in education. It is argued that: “parent’s perception about whether their children are learning affect their decisions about whether to continue schooling” (p. 64). This argument obscures the reality that millions of children, especially the poor, children living in conflict-affected areas, children with disabilities, children in rural areas, and other vulnerable children are *still unable to access education*. Access is a problem that is still far from solved.

In this landscape, private actors are increasingly interested in profiting from filling the gap in accessible quality education through public-private partnerships. Even though there is increasing evidence of the risks of PPPs, the WDR depicts them as a positive solution to limited access to quality education. It states that “public-private partnerships are likely a useful strategy if countries seek to expand enrolments dramatically in a short time” (p.177).

PSL (see box below) in Liberia is given as an example of a successful policy where privately run schools can measure quality through student learning. This is a myopic statement that does not take into account the danger that the PSL pilot poses to quality public education in Liberia – the experiment takes funding and quality teachers away from public schools and exacerbates inequalities.

ACTION:

What are the main barriers to access in your country? Stand with the marginalised and advocate for government interventions that will increase the accessibility of education for disadvantaged groups.

Lobby your government to fulfil its duty to provide access to education for all and not to outsource this responsibility to private partners.



What is PSL?

Partnership Schools Liberia is a pilot PPP (public-private partnership) project that aims to take the Liberian education system, in the words of education minister George Werner, from “mess to best”. Eight different private service providers have been contracted to run up to 25 schools each, and the results monitored. A randomised control trial (RCT) of the pilot showed that, whilst student outcomes improved in these schools, this did not mean that a PPP strategy would be beneficial for the Liberian education system, as the PSL schools’ success in student outcomes was influenced by the extra funds used in these schools, the selection of teachers and the reduction of class sizes. This had a detrimental effect on public schools, and of course violated the right to education as some children, pushed out of the PSL schools, were left without access to education.

Find out more:

- Read various blogs on PSL as part of EI’s Unite for Quality Education campaign: <https://www.unite4education.org/?s=liberia&lang=en>
- Read the results of the RCT (Centre for Global Development): <https://www.cgdev.org/sites/default/files/can-public-private-partnership-improve-liberias-schools.pdf>
- EI also published a report that reviews and analyses documents related to PSL. You can read it here: <https://download.ei-ie.org/Docs/WebDepot/LiberiaReport.PDF>

3. Reject the disproportionate focus on learning metrics

Though the Bank advises caution related to international standardised tests it fails to reject a disproportionate focus on the learning crisis. On the contrary it argues that assessment of learning is a key pillar in solving the so called learning crisis.

The report identifies numerous risks that emerge with the use of standardised testing. Negative effects such as teaching to the test, gaming, exclusion of students with disabilities or special educational needs are cited, and the “No child left behind” policy used in the United States is criticised in particular for having negative repercussions on schools. It is argued that; “when a single metric becomes the sole basis for big policy triggers, the corresponding stakes may become dangerously high” (p.93).

The authors rightfully point out that formative classroom assessments are key to providing real-time feedback to facilitate instruction and thereby support teaching and learning. National assessments are supported for highlighting inequalities, and international assessments (using representative samples) are said to be useful for fostering public awareness and advocating for change but should nonetheless be used with caution. The report argues that though better measurement and data is necessary to improve learning, measurement must be purposeful and must lead to action, for “weighing pigs does not make them fatter” (p.16).



It is positive to see these words of caution on the use of learning metrics coming from the Bank. However, ultimately, the WDR continues the Bank's long tradition of giving disproportionate attention (and consequently funds) to learning metrics. "Assess learning, to make it a serious goal" is one of the WDR's three major recommendations, and the overall, the report advises that assessments should play a pivotal role in improving education systems.

This emphasis on learning metrics in the WDR is problematic; learning metrics are not the panacea to improving education policies. Indeed, using a thermometer to measure the temperature of a sick person will give you information about the extent of their fever, but this act in itself will not make him/her better.

In many developing countries the fact that there are unequal and poor learning outcomes is no secret, therefore it is not appropriate to advocate for governments to use their limited resources on standardized testing to measure the specifics of the extent of the problem rather than using the resources to fund improvement of the system.

Unlike with formative assessments, with high stakes assessments, "the more summative nature of evaluations limits their ability to improve instruction" (GEMR, 2017, p.77). In fact, there is no conclusive evidence that high stakes assessments have any policy benefits. On the contrary, research points to numerous negative consequences. For example, high stakes assessments centre education around learning to prepare for tests and detracts from the broader goal of education – for individuals to gain capabilities to flourish and to be socially responsible citizens.

ACTION

Speak up to ensure that the spotlight on education as a result of the WDR does not become a spotlight on developing and funding learning metrics rather than ensuring quality education for all.

Continue putting pressure on your government to end the use of national assessments that put undue pressure on teachers, and narrow the curriculum. New Zealand recently

Find out more:

- Fischman, G., Topper, A., Silova, I., Holloway, I., and Goebel, J. (2017) An Examination of the Influence of International Large Scale Assessments and Global Learning Metrics on National School Reform Policies. Open Society Foundation. https://education.asu.edu/sites/default/files/casge_working_papers_2_updated.pdf
- Fischman, Gustavo., Topper, Amy Marcetti., and Silova, Iveta. The Idiocy for All and the Rise of International Large Scale Educational Assessments. Ei blog. https://ei-ie.org/en/woe_homepage/woe_detail/15317/idiocy-for-all-and-the-rise-of-international-large-scale-educational-assessments
- Ravitch, D. (Ed.). (2010). Debating the Future of American Education: Do We Meet National Standards and Assessments?. Brookings Institution Press.



scrapped national assessments in primary school in favour of classroom based formative assessments by teachers – it is possible.

4. Reject results-based financing based on test-results

The Bank fails to reject results based financing and instead advises that it should play a greater role to ensure that interventions lead to improved learning. It fails to acknowledge the evidence of the negative effects of linking resources to test results.

Though the report says shockingly little about education financing at all, it does advise that rich countries can play a role in offering funding for education. Specifically, it advises that this development assistance should be linked “more closely to results that lead to learning” (p.211). So results-based financing is promoted without thorough evidence showing the benefits of results-based financing. It is also promoted without a thorough analysis of the numerous problems that it can incur: evidence shows that results based financing can lead to teaching to the test, foster a culture of mistrust and competition, and underinvestment in the most marginalised schools.

According to the GEM report, not only is there not enough evidence that aid should be disbursed through results-based payments, but “the very purpose for which the approach has been introduced is also questionable”¹¹.

Indeed, the Bank’s advice to link development assistance more closely to results can be seen as an ideological continuation of the Bank’s failed past policy of providing governments with conditional aid. Like conditional aid, results-based financing can undermine recipient country ownership, allow donors to impose their policy agendas, and even violate national sovereignty itself.

The Bank itself is increasing its use of results-based financing through the Program-for-Results, where funds are only disbursed subject to defined results (indicators to be met for education programmes are numerous but include test-results). In 2015, the Bank it would double its results-based financing for education to \$5 billion before 2020.¹²

¹¹ GEMR. 2018. Walk before you run: the challenges of results-based payments in aid to education. <http://unesdoc.unesco.org/images/0026/002611/261149E.pdf> p. 1

¹² <http://www.worldbank.org/en/news/press-release/2015/05/18/world-bank-group-doubles-results-based-financing-for-education-to-us5-billion-over-next-5-years>



For a discussion of the WDR's advice on performance-related incentivisation of teachers (based on test results), see recommendation point 7.

ACTION:

Lobby the World Bank to re-consider its emphasis on results based financing. Write a letter to the ED from your country about the negative impact of results-based financing.

What has been the impact of results-based financing in education for you in the classroom? Use social media or write a blog to make others aware of the effects that you have witnessed in the classroom – what has been the impact on teaching and learning?

Find out more:

- The World Bank: Why we believe in Results-based Financing: <https://blogs.worldbank.org/education/why-we-believe-results-based-financing>
- The World Bank Group. 2017. Results based financing in Education: Financing Results to Strengthen Systems. World Bank. Washington. <https://openknowledge.worldbank.org/handle/10986/26268>
- GEMR. 2018. Walk before you run: the challenges of results-based payments in aid to education. <http://unesdoc.unesco.org/images/0026/002611/261149E.pdf>
- Global Partnership on Output-Based Aid in Education, Results for Development (2016). Paying for Performance: An Analysis of Output-Based Aid in Education https://www.gpoba.org/sites/gpoba/files/Docs/Paying_for_Performance_-_An_Analysis_of_Output-Based_Aid_in_Education_R4D_Final.pdf

5. Align the report with the Sustainable Development Goals

The report fails to explicitly align itself with the Education 2030 agenda and Sustainable development goal 4. Its emphasis on learning assessments sits in opposition to SDG 4's broad scope.

Since the agreement of the Sustainable Development Goals in 2015, there has been prominent efforts made globally to rally together in support of their implementation. International organisations, civil society, unions and national governments alike are aligning their work towards the goals and using the language from the goals in their publications to raise awareness of, mainstream, and lobby for the achievement of the goals.

In addition to the standalone goal for education, SDG4 – “ensure inclusive and equitable quality education and promote lifelong learning for all” - other goals such as goal 1 on poverty, goal 2 on hunger, goal 3 on health, goal 5 on gender equality, goal 8 on decent work, and goal 17 on partnerships, are also relevant for education.



It is a missed opportunity that the WDR is not more explicitly aligned with the SDGs and the Education 2030 Agenda. The SDGs are only mentioned in passing in the report. In relation to learning metrics, it notes that: “the success of the SDGs will depend on countries’ ability to turn rhetoric into action by tracking learning” (p. 94), and in the final chapter, the report argues that the SDGs could successfully motivate countries to shift their focus from schooling to learning, due to comparable learning measures (p. 211).

The WDR is, thus, misrepresenting the SDGs by turning it into an agenda for learning outcomes, while the scope of SDG 4 is much broader, and includes commitments to safe learning environments and qualified teachers, to mention but a few. Some of the WDR’s recommendations even seem to dispute the global agreement that teachers must be qualified. Furthermore, the WDR’s focus on the basic skills of literacy and numeracy (4.1.1), is in contradistinction to the fact that to create a sustainable society, all students need a broad education that includes global citizenship, human rights and peace education, critical thinking and socio-emotional skills.

ACTION

Lobby your government to reject the Bank’s advice and instead honour their commitments to the global SDG agenda and the broad vision for education as agreed in goal 4.

Find out more:

- Read EI’s ‘Guide to Indicators for SDG Quality Education’ toolkit to find out more about the SDGs: https://download.ei-ie.org/Docs/WebDepot/2017_SDGs_Toolkit_eng_v1.1.pdf?cldee=bmlrb2xhLndhY2h0ZXJAZWktaWUub3Jn&recipientid=contact-d697d5980d98e411a88e005056ad0002-1a82bd5811d3490c961ef22fe4185594&esid=b9cabd3e-ef05-45cd-916e-ba84182b6cae&urlid=2
- The Global Education Monitoring Report: <http://gem-report-2017.unesco.org/en/home/>
- UN Sustainable development knowledge platform <https://sustainabledevelopment.un.org/>
- Education 2030 Framework for Action: <http://uis.unesco.org/sites/default/files/documents/education-2030-incheon->

6. Make Equity an absolute priority

The WDR seemingly prioritises equity in its discourse. It stresses the importance of an integrated sectoral approach to combat poverty and rightfully emphasises the importance of quality early childhood education for all in order to tackle educational disadvantage.



However, the Bank has a track record of imposing policies on poor countries that exacerbate rather than curb inequality and the approach taken and some advice given in the WDR implies that the Bank will continue to be part of the problem rather than part of the solution.

Vital interventions to improve learning for all are not given due attention, for example, the report does not promote the importance of school feeding programmes nor increased public funding for early childhood education.

The report highlights that though education is central in reducing poverty, it is not a panacea, and therefore an integrated approach to tackle disadvantage is necessary. It points out that in order for learning outcomes to improve, it is not enough to focus only on improving education systems, as “even in a good school, deprived children learn less” (p.10). The effect of malnutrition on cognitive development (especially in early years) highlighted, therefore backing [EI’s long held call for the integration of the health and education sectors](#).

However, shockingly, the research offered by the Bank about the effects of school feeding programs in the document is surprisingly mixed (p. 148). The WDR authors argue that school feeding does not always improve learning as it can “take time away from task”. Such argumentation negates the Bank’s supposed discourse that equity is a moral imperative.

Access to quality early childhood education (ECE) is promoted, as the research showcased shows that early childhood is the optimal period to acquire foundational skills that are a prerequisite for learning other skills at later periods of development (p.102). The report rightfully argues that unequal access to ECE means that children who have not had access to quality ECE start school at a disadvantage – affecting their chances for success in the long term. But supporting equitable ECE by definition means advocating for greater public funding for the sector, as ECE must be free to reach the poorest and most marginalised. ECE is increasingly seen as a profitable business opportunity for edu-businesses – yet the WDR does not analyse the effects this has on equity.

Regarding gender equality, the Bank continues to focus on access to schooling for girls, showing in its approach an over-simplistic and inadequate understanding of the drivers and dimensions of gender inequality. Achieving gender equality in education is not just about ensuring girls go to school. Instead there needs to be gender-sensitivity in every part of educational processes. Schools must be safe places for girls and void of gender-based violence. Classrooms must be girl-friendly environments. Teachers must receive training in gender issues. And the curricular content of education must ensure that both girls and boys gain transformative knowledge to challenge gender hierarchies.

Other interventions to curb inequalities in education such as mother-tongue language of instruction and materials, culturally-responsive teaching and curricula, conditional cash



transfers and attraction of quality teachers to disadvantaged areas are given little analysis in the report.

ACTION:

Don't buy into the Bank's claim that equity is its absolute priority. The Bank's policies show that the Bank's discourse has in fact not changed much at all.

Lobby the Bank to stick to its stated mission of poverty eradication and sustainable development – to truly prioritise equity, the Bank must prioritise interventions for the most in need, update its approach to promoting gender equality, and demand governments to provide free, quality education for all, including in early childhood.

Find out more:

- The FRESH network (Focusing Resources on Effective School Health): an inter-agency group, whose framework, designed by UNESCO, UNICEF, WHO and World Bank was launched at the Dakar Education Forum:
<http://www.schoolsandhealth.org/Pages/FRESH.aspx>
- ASCD: www.ascd.org
- Urban, M., Rubiano, C. I. (2014) [Privatisation in Early Childhood Education \(PECE\) - An Explorative Study on Impacts and Implications](#)

7. Invest in trained, qualified motivated and well supported teachers and education support personnel

The WDR pays lip-service to educators as key actors whilst simultaneously recommending policies that violate their labour rights. It totally fails to recognise the vital role of education support personnel for quality education.

The WDR acknowledges that teachers are at the core of quality education. At first glance it appears that it even supports the strengthening of the status of teachers; any unionist would agree with the Bank's statement that: "teachers need to be treated as professionals – and good professionals receive support and dignity, but are also held to high expectations" (p.13).

However, such a statement is overshadowed by how the report continues to depict teachers as self-interested, demotivated, and under-skilled. It defends policies that de-professionalise teachers and reduce their status.

This section looks at notable advice from the report related to educators in more detail than other issues, as this advice has a direct and tangible effect on our work and must be challenged.



Education support personnel

Before continuing, it must be noted that the WDR has entirely failed to examine and highlight the vital and important contribution of education support personnel in achieving quality education. Education support personnel – non-teaching professionals ranging from school nurses to security staff, bus drivers to psychologists – have been largely ignored in the report.

This is a shocking omission - if we are to provide quality, inclusive education for all, we must recognise the importance of having sufficient and quality education support personnel working alongside sufficient, quality teachers.

Absenteeism

The report frames teacher absenteeism, lack of skills and low teacher quality as one of the key problems that fuel the “learning crisis”. It paints absenteeism as large scale problem that has shocking detrimental costs, pointing out that: “In India excess teacher absenteeism in the public sector is estimated to cost \$1.5 billion dollars a year” (p.173).

In doing so, the reports’ authors point out that they do not aim to blame teachers. However, the fact that there is no thorough analysis (as there is in the [GEMR report](#), p.67) of the structural issues that lead to absenteeism suggests that the report *is* in fact blaming teachers.

Absenteeism does not occur because of demotivated, lazy teachers. This discourse problematically puts blame on individual teachers, rather than acknowledging the multitude of factors that lead to teachers being absent from the classroom. Direct reasons for absenteeism can include the need for teachers to travel long distances to collect pay or to request overdue payments. However, deep underlying causes of absenteeism, such as exploitatively low salaries which force teachers to work multiple jobs to survive, can be traced back to de-professionalisation, and these de-professionalisation policies have been promoted in education by the Bank itself. [Structural adjustment policies](#) (SAPs) in some cases forced developing countries to cap teacher salaries, by imposing loan conditionalities. The Bank can therefore be seen as contributing to the problem of “absenteeism” itself.

As shown in the case study in Gambia in the box below, teacher unions can play an important role in helping to tackle teacher absenteeism and improve education quality.

Initial teacher education and CPD

Regarding teachers’ continuous professional development (CPD), according to the Bank: “most of current practice is ineffective” (p.131). It is argued that the large majority of teachers do receive professional development, but that this training is not of high quality. Consequently, it is suggested by the Bank that “teachers often lack the skills or motivation to be effective” (p. 10). Better quality CPD is promoted to improve teacher performance, but teachers are also presented



as holding back reforms and not “caring enough” to make pedagogical changes that lead to better learning.

These claims are not accurate. The report suggests that large amounts of money is already spent on CPD and that better financing of CPD is not a factor that will help to support teachers to have the skills necessary to provide quality teaching. This is shocking, as in EI’s tri-annual [Status of Teachers survey](#), 69% of respondent unions indicated that there was no access to CPD free of charge (p.48). Sufficient financing for quality PLD is vital for quality teaching – teachers also need to be enabled to be part of CPD – being paid for their training time, having their classes covered and having the support of their school directors.

The Bank advises that professional development could be improved through training that is individually targeted and repeated, with follow up coaching – often around a specific pedagogical technique. Teachers should also be trained to pitch to the level of the student to avoid learners failing behind to the point where they cannot catch up (p.131).

However, a sophisticated, detailed discussion of the issues regarding effective CPD is not given to back up these general recommendations. Furthermore, the report does not point out that in order for CPD to best support quality teaching, teachers must be consulted on their needs, so that the CPD they receive is relevant and useful to them. Unions are also playing an important role in filling the gap caused by a lack of government funding to CPD, providing their members with various forms of CPD such as collaborative learning opportunities. This is not taken into account in the report.

Worse still, in the WDR, initial teacher education/ pre-service training is “called into question” by the Bank, based on the perceived success of unqualified teachers in raising student outcomes through schemes such as Teach for America (p.133). It is argued that experience and qualifications have a weak correlation with learning so this is not how salaries and career progression should occur.

Unions must fight this dangerous narrative and ideological ‘evidence’ from the Bank. This denial of the importance of initial teacher training goes against the global agreement that to achieve quality inclusive education for all we must increase the numbers of *qualified and trained* teachers – target 4.c of the Sustainable Development Goals.

Working Conditions:

Precarious work

In the WDR, the use of contract teachers is presented as a potentially rationale, cost-effective choice for governments with teacher shortages, if the project is managed well. Such promotion of precarious work de-professionalises teachers. Additionally, this promotion of short term solutions is in contradiction to the WDR’s own recommendations elsewhere in the report that better candidates need to be attracted into the profession to improve quality in the long term. In



order for this to happen, teaching must be viewed as a high status profession, with decent salaries and good working conditions. Short term contracts and low pay will deter the best candidates.

The WDR notes that the use of contract teachers can be difficult to scale up because of other actors (e.g. unions) interfering and blocking the reforms (p.170 gives the example of Kenya where the Kenyan Teachers' Union successfully challenged the scaled up introduction of contract teachers, as such hiring practices violated constitutional rights to equal pay for equal work). We want to this to remain the case – for teachers and unions to continue putting pressure on governments to ensure that teachers have decent contracts and working conditions.

Salaries

The report points out that teachers' salaries often account for over 80% of the education in low income countries. It is true that teachers' salaries typically account for a large proportion of most country's education budget – but, as the most important components for providing quality education, this is understandable and appropriate.

In a small box on p. 137 (Box 6.5), the WDR appears to suggest that evidence shows that raising teachers' salaries does not improve their motivation so in turn does not improve student learning outcomes. However, it cites only one study – in Indonesia, where it was found that doubling teachers' pay had no positive effect on learning. Even without taking into account the limitations of the findings of this study as a result of numerous possible problems with the way that the randomised control was carried out, the WDR's use of just one study to back up their advice on whether or not raising salaries is a good policy option is irresponsible and misleading. The box concludes that; "though higher salaries could attract more capable candidates into the profession over time, raising salaries is no quick-fix for shortcomings in motivation or effort" (p. 137).

Raising teacher salaries so that they are comparable to the salaries of similarly educated professionals is not only necessary as part of a long term strategy to raise the status of teachers and education quality, but it is also a key indicator of sufficient teacher motivation for Sustainable Development Goal 4 (indicator 4.c.5).

Labour rights

The report seems to suggest that teachers and politicians are trapped in coercive and entrenched interdependencies (p.195). This simplistic analysis argues that teachers can wield power over politicians through the promise (or not) of electoral support, whilst politicians can manipulate teachers through jobs or desirable transfers. It is argued that when trapped in such "unhealthy interdependencies", participants "devise mechanism to protect themselves from undue blame or punishment".



Teachers' fight for secure employment is presented as in tension with their vocation to help children learn. The report states: "teachers and other education professionals – even when motivated by a sense of mission – also fight to maintain secure employment and to protect their incomes" (p. 13). This not only neglects to recognise teachers' *right* to decent work but also disregards the fact that teachers' working conditions are the student's learning conditions.

Performance related incentivisation

Performance incentives are discussed as a way to increase teacher motivation (p.139). Some of the negative effects of this carrot-and-stick style motivation mechanism are pointed out (for example, the report discusses how in Kenya, teachers taught to the test and neglected more 'holistic learning' as a result of an incentive programme). However, the report implies that, in the short term, such incentives are necessary to improve outcomes. This disconnect between what the Bank recommends for the long term (a respected, supported and high calibre teaching profession) and the short term is highly problematic.

The report's advice appears to be that good teachers should be rewarded and bad teachers should be punished or even fired. An economist, is cited, suggesting that "replacing the least effective 7-12% of teachers could bridge the gap between US student performance and that of Finland" (p.137). This discourse is simplistic, disregards the differences in school conditions and the ease with which teachers in schools with students that are mainly for higher social economic backgrounds can achieve good results from their students compared to teachers working in poorer schools, and ignores the flaws in student-performance based teacher evaluations.

Promoted by the Bank not only in the WDR but in most of its policy advice on teachers, use of performance based pay is likely to expand. Yet, according to the GEMR, linking student performance to teacher salary reduces equity (GEMR, 2017, p. 77) as lower performing students are often excluded in policy and practice. An unhealthy competitive environment, reduced teacher motivation, and teaching to the test are also promoted

ACTION

If the World Bank wants to support quality education for all, then they must support teacher-driven education policy and teacher professionalism.

Refute the Bank's advice on performance related pay and campaign for evaluation systems designed and agreed upon by the profession itself.

Unite with other educators through your union to develop professional standards, engage in collaborative professional development, and develop teacher-driven solutions to contribute to reducing teacher absenteeism.

Lobby your government to respect international recommendations on the status of teachers (see the 1966 ILO/UNESCO recommendation below).



Reports from CEART (the Committee of Experts on the Application of the Recommendation concerning Teachers), which monitors the implementation of the recommendation, show that there are still numerous barriers to the realisation of the recommended status of the profession. Is the status of teachers being violated in your country? If so, consider submitting an allegation to the commission. More information about the procedure can be found [here](#).

Solving teacher absenteeism innovatively – the case of the Gambia teachers’ union

One major cause of teacher absenteeism is the need for teachers to travel to collect their salary. Teachers working in remote areas may have to travel for days to go to the nearest town or city where they can pick up their pay from a bank. Not only does this mean that teachers must be absent from school, but travelling long distances can put teachers at risk, especially female teachers.

In the Gambia, the Gambian Teachers’ Union, the GTU has helped to solve teacher absenteeism by taking up the responsibility of paying teachers, using the Gambia Teachers Union Cooperative Credit Union (GTUCCU). Teachers no longer have to travel long distances to collect their salaries, and are no longer paid late as the union can pre-finance salaries when the government is late in processing them. This intervention has resulted in a significant drop in teacher absenteeism, but has also meant that “ghost teachers” have been revealed, saving the government money.

Find out more:

Blog by the General Secretary of the GTU, Marie Antoinette Corr:

https://worldsofeducation.org/en/woe_homepage/woe_detail/15620/wdr2018-reality-check-8-in-the-gambia-the-positive-role-of-unions-in-contributing-to-quality-education-by-marie-antoinette-corr



8. Ensure social dialogue

The WDR utterly fails to recognise the right to social dialogue and the importance of the participation and consultation of teachers and their unions in education policy decision making.

The WDR gives little emphasis to the importance of unions and teacher organisations, collective bargaining, social dialogue, or teacher participation and consultation in policymaking.

On the contrary, the report focuses only one box (10.1) specifically on unions. The analysis depicts unions as entities that occasionally support learning, but more often than not detract from learning. The box states: “Teacher unions are important institutions for protecting the rights of teachers, but do they matter for student learning? The quantitative literature identifies situations in which unions may have undermined high-quality teaching and learning”. It also argues that examples of unions being beneficial for reform efforts are “hidden behind large-scale correlations” and that “unions sometimes stifle the formation of an effective teaching cadre”.

The WDR therefore (unsurprisingly) contributes to the Bank’s long-run tradition of union-bashing. This approach to unions opposes the commitment made in the Education 2030 Framework for

Find out more:

- Figazzolo, L. (2013) The use and misuse of teacher appraisal
- Vasileios, S. (2015). The status of teachers and the teaching profession. Education International.
- Value added measurement or modelling (VAM). Sorenson, Tore Bernt. 2016. Education International. https://www.ei-ie.org/media_gallery/2016_EI_VAM_EN_final_Web.pdf
- ILO/UNESCO Recommendation concerning the Status of Teachers (1966) and the UNESCO Recommendation concerning the Status of Higher Education Teaching Personnel (1997) http://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---

Action, which clearly states that: “teachers, and their organizations, are crucial partners in their own right and should be engaged at all stages of policy-making, planning and implementation”¹³

¹³ Education 2030 Incheon Declaration and Framework for Action for the implementation of Sustainable Development Goal 4.

http://www.unesco.org/fileadmin/MULTIMEDIA/HQ/ED/ED/pdf/FFA_Complet_Web-ENG.pdf

(p.1)



Instead, the report claims that the relationship between public spending and student learning is weak. The “spotlight” section on education finance on p.183-4 questions the value of spending more on education, as successful education systems are found to be possible even in countries that spend very little on education. Furthermore, it implies that financing for education is already ample – “given all the investments that countries have made in education, shortfalls in learning are discouraging” (p.9). The argument given is that inputs are useful, only if they are the “right” inputs. In particular, it is stressed that investment needs to be made (by both so called developing countries and donor countries) to support the development of and improvements in national, regional and international learning assessments.

This discourse is unhelpful and detrimental to the education community’s efforts to prioritise and greatly increase education financing.

ACTION

The WDR’s failure to analyse and make a clear statement on increasing education financing means that civil society has to redouble its efforts to pressure governments and donors to invest in education.

Hold your government accountable to their commitments in the [Education 2030 Framework for Action](#), where it is specified that governments should spend at least 20% of national expenditure on education and donors countries should commit at least 0.7% of gross national product (GNP) for ODA to developing countries (FFA, p. 10).

Lobby your government to close tax havens, combat tax avoidance and evasion, and ensure that companies pay their fair share of taxes.

Question your government’s involvement in international assessments. Is inclusion in IEA and OECD international assessments going to improve your country’s education system? What are the costs?

Find out more:

- Information about GPE replenishment:
<https://replenishment.globalpartnership.org/en/chapter/gpe-replenishment/>
- The International Commission on Financing Global Education Opportunity:
<http://educationcommission.org/>
- The Finance Commission advocates for increased education financing. However, it also promotes the adoption of an International Education Financing Facility for Education, which
- Education 2030 Incheon Declaration and Framework for Action for the implementation of Sustainable Development Goal 4.
http://www.unesco.org/fileadmin/MULTIMEDIA/HQ/ED/ED/pdf/FFA_Complet_Web-ENG.pdf



10. Caution against increased flexibility, innovation and adaption

The WDR states that “there is no consistent evidence that private schools deliver better learning outcomes than public schools” and outlines some of the threats posed by private schools. However, it does not champion public education and the Bank hypocritically continues to support “innovative” profit-making edu-businesses such as Bridge International academies through the International Finance Corporation.

Though the WDR provides shockingly little detailed discussion on the private-public debate, the short analysis that it does provide on the issue concedes that **“there is no consistent evidence that private schools deliver better learning outcomes than public school”** (p.176). It also identifies numerous risks of education privatisation, such as:

- the exclusion of disadvantaged or less able/desirable students;
- social segregation;
- exploitation of families for profit;
- and the undermining of public education.

It argues that **“overseeing and regulating private schools effectively may be no easier than providing quality schooling”**, and that whether or not they encourage private schooling, **governments “cannot contract out the responsibility for ensuring that all children and youth have the opportunity to learn”** (p.178).

The Bank also explicitly states that user fees and direct schooling costs act as a barrier to schooling. Examples are given of how cutting user costs significantly raised school participation by children from poorer families in Burkina Faso, Uganda and Malawi (p. 63).

In analysing how multiple stakeholders can pull away from rather than align towards learning, the report also recognises that “some private suppliers of education services – whether textbooks, construction or schooling – pursue profit, which can lead them to advocate policy choices not in the interest of students” (p.13).

No explicit support for importance of public education

However, the WDR does not explicitly advocate for *free, public* quality education. Instead, following their [Education Strategy 2020](#), the report appears to define education systems in a broad manner, inclusive of *all* learning opportunities available in a country, both *public and private*.

There is no in-depth analysis of the threat of privatisation and commercialisation on education for all. Rather, private actors’ interest in profit is depicted as comparable to other interests that



do not align with learning, which every other stakeholder is claimed to have (e.g. politicians' desire for re-election and teachers' interest in their salaries). Such discourse belittles the threat that profit-making has on quality education.

Teachers as irreplaceable?

The WDR values highly the importance of the teacher-student relationship, and argues, in line with Education International, that technology can never replace a teacher but, if used appropriately can be a useful complementary tool.

However, [International Finance Corporation \(IFC\) has funded](#) Bridge International Academies, whose [education model is based on replacing quality teachers with tablets](#). Furthermore, it is ironic that, in a section entitled "focus everything on teaching and learning" (p.22), the advice given does not relate to teaching and learning approaches, practices or pedagogy, but rather mentions the usefulness of technology.

ACTION

Get involved with EI's Global Response campaign against the commercialisation and privatisation of education, and the campaign to Unite for Quality Education:
www.unite4education.org

Challenge the Bank to stick to its own advice in the WDR regarding the risks of private schooling to equity and quality education. Lobby the IFC to stop investing in private providers such as Bridge International Academies.



Press releases regarding the IFC's investments in private education can be found here: <https://ifcext.ifc.org/ifcext/pressroom/ifcpressroom.nsf/PressReleasesAll?SearchView&Query=FIELD%20MainTopic=%22Education%22%20&SearchOrder=4&SearchMax=0> **Have IFC-invested edu-businesses had negative effects on equity or quality public education in your country? Challenge the IFC to DIVEST from these businesses.**

What is Bridge International Academies and why should the World Bank (according to its own findings and advice in the WDR) condemn it?

Bridge International Academies (Bridge) is a profit-making company that has private nursery and primary schools in Kenya, Uganda, Nigeria, Liberia and India. Its business model relies on cutting costs and it operates in unregistered below-standard school buildings, which have been declared illegal in Uganda and Kenya (but the company has continued operating against the law).

Bridge hires untrained teachers who are paid low salaries. Their model claims that tablets, loaded with word-by-word lesson scripts and class registers are a substitute for qualified teachers to achieve quality education. Unqualified and lowly trained teachers teach by blindly following the tablets, in defiance of the Incheon Declaration and the Framework for Action, which calls for “professionally qualified” teachers.

The WDR is unequivocal about the importance of quality teachers for quality education. It is clear that educational technology is a complement rather than a replacement for quality teaching. Research cited in the WDR shows that the teacher-student relationship is at the core of quality education.

The WDR also stresses that interventions must be made to increase access and enhance the learning outcomes of the most disadvantaged. Bridge hopes to scale up its for-profit education provision – cutting costs by operating with a standardised model on a large scale. Its user fees therefore exclude the poorest, and its standardised school-in-a-box model directly goes against the Bank's own advice in the WDR that solutions found to address deficits education systems and provision should be context specific and based on local realities.

ACTION: EI asks for your support to lobby the IMF to stop supporting Bridge and for the World Bank to condemn the business. Rather than showing innovation, Bridge's

Find out more:

Private Profit: Public Loss: http://www.right-to-education.org/sites/right-to-education.org/files/resource-attachments/GCE_Private_Profit_Public_Loss_2016_En.pdf

Verger, A., Fontdevila, C. & Zancajo, A. (2016) *The privatisation of Education: A political economy of global education reform* (published by Teachers College Press)

A brief description of PPPs by Verger A. <https://www.youtube.com/watch?v=-J0cTXLGch8>

Verger, A., and Moschetti, M. (2017).

<http://repositorio.minedu.gob.pe/bitstream/handle/MINEDU/5284/Public-Private%20Partnerships%20as%20an%20Education%20Policy%20Approach%20Multiple%20Meanings%2c%20Risks%20and%20Challenges.pdf?sequence=1&isAllowed=y>
UNESCO

Verger, A. and Moschetti, M. (2016). *Public-Private Partnerships in Education: Exploring Models and Policy Options*. Universitat Autònoma de Barcelona

<http://repositorio.minedu.gob.pe/bitstream/handle/MINEDU/5284/Public-Private%20Partnerships%20as%20an%20Education%20Policy%20Approach%20Multiple%20Meanings%2c%20Risks%20and%20Challenges.pdf?sequence=1&isAllowed=y>

4. A Call to Action: What can teachers and unions do to challenge the WDR?

The WDR, coupled with GPE replenishment, has brought education into the spotlight in development discussions in 2018. Teachers and unions must be active and ensure that our voices are heard, especially whilst the education sector has visibility. The alternative is to allow non-education actors such as the World Bank to speak for us and to guide policy developments in education for development.

Below are some suggestions and tips that might help when you and your union respond to the WDR as part of your broader campaign for teacher and union rights, and quality education.



Raise awareness of the impact of the Bank's policy and practice

Has your country been subject to structural adjustment programmes or has received concessional loans from the World Bank group? How have they affected your country in terms of economic and social development? As part of countering the Bank's imposed policy, why not do some research about the lending programmes and conditions that are in place in your country.

Do you know to what extent your country's education policy is influenced by the World Bank? Is there a relationship between the daily challenges you face and the policies imposed upon your government by the World Bank?

Monitor the Bank's activities in your country and make others aware of the WB's negative impact to your work.

To find out more:

Bretton Woods Project <http://www.brettonwoodsproject.org/>

Counter-case studies and research

Does the WDR include examples/data from your country?

If so, think about the following:

- Do you think that your country was included as a legitimate example to the broader argument made?
- Was the research cited produced by independent researchers rather than World Bank employees or consultants?
- Was the research used recent and 'in-date'? Has the WDR adequately represented the current situation in education in your country through its example?
- Was the research cited from your country used appropriately to adequately represent the findings of the research?
- Do the arguments made by the Bank adequately represent the "whole story" of what is happening "on the ground" in your country?

If the answer is no for any of the above, we suggest that your union thinks about producing "counter-case studies".



This could involve sharing existing “counter-research” that better describes and analyses the situation in your country with EI and your members, to try to dispel inaccurate narratives. If no research currently exists, consider your union’s capacity to conduct its own “counter-research”. You could also contract an independent researcher from a local university to conduct the research. Either way, please be sure to notify EI about this research – we may be able to help you by providing communications or media coverage of the research, in order to build a strong

Find out more:

The following resources may be useful for improving your organization’s capacity for research:

EI research toolkit:

https://worldsofeducation.org/en/woe_homepage/woe_detail/15658/from-research-to-

“counter-narrative” to the information in the report.

What are your experiences at the chalkface? Make your voice heard

As educators, why not share/publicise/write about/discuss your own lived experiences and daily reality.

- What challenges do you face?
- What do you love about our job?
- What system reforms do *you* think are necessary to improve the quality of education in your country?
- What initiatives have you led to fight for quality education?

Ask your union to publish your opinion-piece, article, podcast or video. Alternatively, get in touch with EI, and we may be able to publish it on our website, helping to raise awareness about the local realities of individual teachers and the need to include teachers in policy making and decision making on education.

Continue campaigning for strengthened social dialogue

Defend trade union rights and keep campaigning for the importance of social dialogue. Teachers should be consulted for all policy changes, this is vital for the success of policy reform. This is the case not just on a national level but also on the international level - the Education 2030 [Framework for Action](#) specifies the importance of consulting teachers and engaging with unions in implementing the SDG apparatus.



Support your union to grow stronger

The WDR portrays unions in a generally poor light, suggesting that whilst there are exceptions, in the majority of cases, unions are harmful to student learning. Unions are portrayed as holding back education reform by putting a concern for teachers' own welfare before that of student learning and quality education. The report calls for an alignment of all actors towards learning and the building of coalitions of stakeholders that work together for learning, however this seems to side-line unions, and appears to recommend informal coalitions of teachers, students, private sector, policy makers and parents in favour of social dialogue through traditional union channels.

As the report acts as advice for ministry officials, it vital that in response to the report, unions redouble their efforts to become stronger and more effective. Recent research commissioned by EI (see below) shows that for union renewal, unions need to ensure that they are relevant (especially for young teachers). In addition to supporting teacher on industrial issues, successful unions are vibrant professional organisations offering professional support and development.

Think about what your union can do to counter the “union-bashing” discourse of the WDR.

- How can your union build its membership and support base?
- How can your union better publicise its work and efforts towards achieving quality education?
- How can your union gain greater public support and spread awareness of the work that unions do to protect or advocate for quality education?

Find out more:

Stevenson, H., & Bascia, N. (2017) *Organising teaching: developing the power of the profession*. Education International. https://download.ei-ie.org/Docs/WebDepot/Research_institute_mobilising_final.pdf

Focus on financing

In response to the glaring omission of an in-depth analysis of the education financing crisis in the WDR, teachers and unions are encouraged to redouble their efforts to campaign for increased education financing. What is the education financing situation at your school? What about in your district? At the national level?



Advocacy and lobbying strategies

Jaime Saavedra only recently became the senior director of Education (Education Global Practice) at the World Bank (2017). For this reason, there is hope that he will be open to consultations and take into account the importance of views from those who are “on-the-ground” in schools.

- Why not write a letter to the Bank in response to the WDR? You could also engage with the executive director (ED) from your country: <http://www.worldbank.org/en/about/leadership/directors>. If your country has very little voting power, why not contact various additional EDs to bring up your concerns or share research evidence from your country on a certain issue?
- Are the WDR authors/team coming to your country in their world tour to launch the report? Can you attend and present your critical analysis? Are there other key events taking place in your country where you can seize the opportunity to raise your voice and get good press coverage?

Alternatively, target your ministry of education:

- Let them know teachers’ collective perspective of whether the Bank’s advice should be taken on and where it should, according to a strong evidence base, be rejected.
- Lobby your government through social media, for example you could target the relevant politicians through twitter.

Unite for quality education!

Remember the benefits of working together with others. There is certain to be other local and international organisations that have similar concerns and demands for quality education and teachers rights. Below are some tips for igniting interest:

- Discuss the WDR or issues related to its content that you think are relevant in your context in the classroom. Teach your students about how to advocate for change and stand up for the issues they think matter. You could use excerpts from the WDR in the classroom in order to stimulate critical thinking or encourage global citizenship. Inspire your students to campaign for quality education.
- Join together with your colleagues – discuss what do you need to support you to provide quality education. What needs to change in your environment? You could raise awareness of the issues you think are relevant by organising an event at your school.
- Lobby your union to put the necessary issue on their agenda.
- Join with parents and community members. Discuss the education system in your country and the challenges faced to provide quality education to all learners. What needs to happen for this to change? In what way can your community play a role?



5. Conclusions

It must be noted that this is not by any means a comprehensive critical analysis of the report's problematic analysis and policy advice in the WDR. For example, this guide does not look at the WDR's perspective on gender, school autonomy, TVET or higher education, neither does it offer a critical analysis of the sources used in the report.

Nonetheless, we hope that this guide serves as a useful tool to help you gain an overview of the direction of the Bank's policy advice, and encourages you to think further about how to respond to the policy implications of the recommendations made in the report.

Teachers and education support personnel around the world together with EI can ensure that the WDR's harmful narrative on education professionals does not go unopposed.

Educators all over the world try their best to provide quality education in difficult circumstances. It is educators who know best how to improve education systems as they live it every day. Educators and their unions have the right to play a role in guiding education reform and policy to achieve Sustainable Development Goal 4. So reject the Bank's perceived authority on education policy – the World Bank, after all is a bank. You are the experts in education.

