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Learning from all? The World Bank, aid agencies and the construction of hegemony in education for development

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This paper explores the nature and quality of the participation that characterises the Bank's consultations with external actors and examines the extent to which the Bank is responsive to such feedback when it comes to defining its policy preferences and strategies in the education domain. It draws on a case study of the participatory process that was organised around the definition of the last World Bank Education Strategy (WBES2020) and focuses on the participation of three European aid agencies, the Ministry of Foreign Affairs of the Netherlands, Germany's Federal Ministry for Economic Cooperation and Development and the Department for International Development of the UK. This paper acknowledges that a significant effort was made to promote the inclusiveness and transparency of the participatory process, yet it concludes that the conditions for promoting quality participation and substantive policy change were not provided. Furthermore, the way international aid agencies produce and use knowledge limits their role and influence in the context of the Bank's consultations. Hence, by not contesting the Bank's policy ideas substantially, the agencies contribute inadvertently to reproducing the Bank's predominance in the education for development field.

Introduction

Today, the World Bank (or, simply, 'the Bank') is the most influential international organisation (IO) in the education for development field. It is the largest single international funder of education for development, and the technical and knowledge-based resources it devotes to education dwarf those of other international institutions. The material and ideational power of the Bank are behind its hegemony in both the theory and practice of international development (Stone 2003). Apart from its well-known lending activity, the World Bank spends dozens of millions of US\$ every year on research activities, making it 'the largest development research institution in the world' (Gilbert and Vines 2006, 49), producing hundreds of knowledge products, including reports, academic articles, impact evaluations, working papers, seminar proceedings and policy briefs. Despite its high level of productivity, the way the Bank produces knowledge has been criticised for its neoclassical economics bias and for its hermetic nature (Klees 2012; Rao and Woolcock 2007).

Aware of this criticism, the World Bank is taking different measures to make the institution more open to learning from its environment and from a range of partners.

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In its own words: ‘The World Bank – through a variety of consultative mechanisms – recognises that it does not possess a monopoly on knowledge, and is making efforts to learn from the insights and experiences of others in the development community.’¹ Among other measures, the Bank has opened a range of participatory mechanisms to key stakeholders, including civil society organisations, international scholars, communities and international aid agencies (IAAs). Consultations with stakeholders are organised as a way to capture their demands and ideas, and to incorporate them into the Bank’s policy strategies and operations. Nevertheless, very little empirical research has tried to assess the actual level of openness of the Bank to external ideas and, even less, to the concrete effect of external participation in the Bank’s policies.

We aim in this paper to address this gap in the literature. Our purpose is to explore the nature of the participation that characterises the Bank’s consultations, as well as the extent to which the Bank is open to external voices when it comes to defining its policy preferences and strategies in the education field. We accomplish these aims by presenting a case study on the ambitious participatory process that was organised around the definition of the last World Bank Education Strategy (WBES2020), titled ‘Learning for All’ (see World Bank 2011). IAAs played an important role in this process, especially in Europe, where they hosted most of the meetings that were carried out in the region. In particular, our study focuses on the participation of three European aid agencies, the Ministry of Foreign Affairs of the Netherlands (MINBUZA), Germany’s Federal Ministry for Economic Cooperation and Development (BMZ) and the Department for International Development of the UK (DfID).

The consultation process behind the WBES2020 is a particularly interesting case for understanding policy participation due to the extent and reach of the consultations. Dozens of meetings were organised over the course of 14 months in 69 different countries. At a more epistemological level, the study of this consultation process is especially appropriate due to its nature as a ‘critical juncture’. Critical junctures are particularly revelatory because, as moments of disruption to typical operating procedures, they tend to expose underlying structures and mechanisms of influence (Danermark et al. 2002). This is the case of the consultation behind the creation of the WBES2020 since it meant an intensification of the interaction and exchange of ideas among key education stakeholders in a short period of time. Furthermore, practitioners, in such moments, are forced to reflect on their policy ideas and, specifically, on how and why they use knowledge to support their policy preferences. Thus, the conduct of research on actors’ reflexivity and ideational influence becomes more feasible during this type of moment.

Methodologically, we utilised a number of qualitative strategies, including interviews, participant observation in meetings, document analysis and matrix-based heuristics (see Edwards 2012). We conducted eight interviews with key actors from each of the three IAAs mentioned above. Each of the representatives interviewed was targeted specifically because of their involvement in the consultation process was facilitated by the World Bank. The interviews themselves addressed such issues as the nature of IAA participation, expectations and feedback in the policy formation process, as well as how the content of WBES2020 was viewed and utilised within each IAA. Participant observation was also a feasible strategy for data collection because we attended and engaged in two World Bank multi-stakeholder feedback sessions during June and November 2010 that were held in Amsterdam and Paris, respectively. Finally, aside from reviewing the documents made available by the World Bank (e.g. concept note, first and final drafts of WBES2020 and consultation feedback summaries), we were also able to

access and analyse several internal documents related to aid agency's feedback to the World Bank education strategy.

The paper is structured as follows. We will first discuss the trends of participation in IOs, with a focus on the World Bank. Here, we will offer a range of analytic concepts to assess the level and quality of democratic participation in global institutions. Second, we focus on the case of WBES2020 by describing the participation process and the three aid agencies on which this study focuses. Third, we present our findings on the role of bilateral donors in the context of the WBES2020 consultations. Here, we reflect, first, on what has been the nature of IAA's participation in the consultation process and, second, on the different potentialities and limits to their substantive influence in the process.

Ultimately, we argue that the conditions required for the consultations to promote quality participation and substantive policy change were not present. Independent of the Bank's openness to external views, the way IAAs produce and use knowledge introduces additional limitations to their role and impact in the context of World Bank consultations. By not substantially challenging World Bank policy ideas, they contribute to reproducing the Bank's hegemony in the education for development domain.

Analysing external participation in IOs: focus on the World Bank

As IOs take decisions that ultimately affect more and more citizens all around the world, debates around their democratic legitimacy are increasing. As a response to the external criticism and pressure received, most IOs have introduced (or developed further) transparency and participation policies. Today, more and more IOs are open to the involvement of external actors in their everyday operations. Such involvement is justified by the fact that, although external actors do not have formal authority in IOs, they are directly or indirectly affected by the decisions taken. According to the United Nations (2007), non-state actors are able to become active political players within most IOs in a variety of forms, including: (a) dialogue; (b) advocacy; (c) mobilisation of private funds; (d) information and learning; (e) operational delivery and (f) establishment of partnerships.

The World Bank is one of the IOs that has a long track record of incorporating external participation. The Bank began to work with external actors, notably non-governmental organisations (NGOs), in the late 1970s and early 1980s as a response to increased pressure from civil society in developing countries around the environmental and social effects of Bank projects (Miller-Adams 1999). During this time, the Bank hired new staff that was more receptive to external participation; not coincidentally, such staff had often been transferred from other international agencies (e.g. the United States Agency for International Development or Oxfam) and tended to be non-economists (Miller-Adams 1999). By the late 1980s, at the same time that NGOs were demanding more accountability for the Bank and the opportunity to exercise their voice in the design of Bank policies, Bank officials began to see civil society participation as a means of improving the success of project implementation (Long 2001). While in 1990, 12% of projects being implemented involved NGOs, by 1997, 47% of active Bank projects did so (World Bank 1998).

The Bank's increasing openness came about as it was consistently scrutinised by civil society. Beginning in 1989, and continuing into the 1990s, there were numerous riots against the Bank's structural adjustment programmes (Leal 2007). Social movements and NGOs also organised the global '50 Years is Enough' campaign in 1994

in order to advocate against the Bank's neoliberal approach to development (World Bank 1998), and they created their own summits to parallel those of the United Nations, the World Trade Organization and the World Bank itself (World Bank 2005). Street protests around the summits of these global organisations captured great media attention (Leal 2007). The result of this advocacy activity from the 1980s onward was a crisis of legitimacy for the Bank (World Bank 1998). Within this context, and through developing partnerships with civil society organisations, the Bank has attempted to lessen the mounting criticisms 'about its authoritarian policy style and the lack of context-based negotiation with the local community' (Bonal 2002, 15).

An important response from the World Bank, under President Wolfensohn's mandate (1995–2005), was to require that a broad range of stakeholders participate in the creation of poverty reduction strategy papers (PRSPs). Beginning in 1999, PRSPs were necessary in order to qualify for Bank loans; they were to specify the priorities for development and the strategies through which the country government intended to meet them (World Bank 2000). Most recently, in the decade of the 2000s, the Bank began to increase its encouragement of participation at the global level. Prime examples include consultations related to the 2004 World Development Report, the 2007 Global Anti-Corruption Strategy and the 2008 Strategic Framework for Climate Change and Development, among others, as well as regular dialogue with CSOs alongside the Bank's Annual Fall and Spring Meetings (World Bank 2005, 2007, 2009). By the mid-2000s, the Bank declared that 'Consulting directly with civil society has become a key input for the Bank in the preparation of most [country assistance strategies], sectoral strategies and operational policies' (World Bank 2005, 12).

The Bank and other IOs have introduced the voices of external actors in both the operation and definition of policies for different reasons. Independent of whether IOs believe in the intrinsic value of external and democratic participation, such participation can contribute, on the one hand, to the effectiveness of their actions and, on the other, to the enforcement of rules and norms. In relation to the latter, it is well known that participation and other forms of non-hierarchical steering can contribute to the moral legitimacy of new rules and normative frameworks. According to Risse (2004):

The idea is that actors will comply voluntarily with norms and rules, the more they are convinced of the legitimacy of the rule. The legitimacy of a rule can result from beliefs in the moral validity of the norm itself, but it can also result from beliefs in the validity of the procedure by which the rule had been worked out (...) the micro-mechanism underlying this type of social steering concerns learning and persuasion. (293)

Analysing the potential and limits of participation in IOs

Global governance scholars have engaged in both normative and analytical debates concerning the reasons and the implications of external participation in IOs. This is a very slippery research area that faces numerous theoretical and methodological challenges. One of the challenges is access to the participation spaces and to relevant data, although a more significant challenge comes in the form of attribution of causality, since it is not easy to isolate the elements that explain the level of impact of external actors in the decisions adopted by IOs.

The literature on this topic is predominantly critical and sceptical, with many scholars of the opinion that the external-actors involvement in IOs ‘does not amount to much more than a participatory fig leaf’ (see Nanz and Steffek 2005, 7). Many see participation policies in IOs, simply, as a functional response to external pressure and as the result of their need for compensatory legitimation. In this view, participation is a ritualistic action organised from a managerialist perspective that tends to reproduce the perspectives of dominant actors (Weiler 1983). According to Kapoor (2004), reproduction manifests in a number of ways, for example, when participation is ‘molded to fit bureaucratic or organizational needs’ or when it is invoked ‘instrumentally to “legitimize the implementing agency”’ (Kapoor 2004, 126). As Kapoor (2004) points out, ‘in this scheme of things, participation is “managed” and “institutionalized”; it becomes “tokenistic”, with the alleged beneficiaries treated “largely [as] objects rather than subjects”’ (126). When the participation of actors acquiesces to such tokenistic forms, it can be characterised by Foucault’s (1975) notion of panopticism because the actors become an ‘object of information’ and not a ‘subject of communication’ (200).

A range of scholars have adopted a similar perspective in relation to the World Bank’s participatory policies. For instance, Bonal (2002) considers that external actors’ participation has somewhat influenced the Bank’s agenda at a discursive level, though the theory, principles and expected outcomes of its education policy have remained unaltered in recent decades. For his part, Samoff (2007) asserts that the World Bank, when it requires the participation of external actors in a policy-related process, ensures that its expectations and frameworks are entrenched. This is accomplished indirectly through procedural requirements, which serve to ‘constrain and set priorities’ in ways that are ‘barely discernible’ (Samoff 2007, 72). Notably, to the extent that an institution like the Bank can accomplish this, it can avoid participation that may threaten bureaucratic legitimacy. Other authors reach similar conclusions in relation to participation in PRSPs. Although PRSPs are perceived by many as an opportunity for external actors to influence development policy dialogue, they have continued to centre on the prerogatives of the World Bank, including structural adjustment measures (Gottschalk 2005).

If participation is not aimed to be tokenistic, it should reflect a genuine exchange of ideas, or deliberation, as well as decision-making by reasoned consensus. Deliberation happens when we observe a sustained exchange of arguments, in which the different parties offer – and ask others to present – reasons for their proposals (Nanz and Steffek 2005). More and more scholars are interested today in understanding the actual level of deliberation in participatory forums and their concrete impact on IOs’ policies. To do so, they focus on different aspects of the participatory process, including *level of inclusiveness* of the spaces that are being opened to external actors, *transparency and access to the information* that is relevant for qualified participation, *justification of ideas* by the different parties and whether all participants have (equal) opportunity to influence the outcomes of the meeting, and *responsiveness of the IO* to the different ideas and criticism that are put on the table by external participants (Nanz and Steffek 2005).

On the basis of Habermas’ communicative action theory, Risse (2004) considers that the *ability to empathise* by both internal and external actors is a precondition for deliberation to happen in the context of IOs. According to him:

Actors need to recognize each other as equals and need to have equal access to the discourse, which must also be open to other participants and public in nature. In this

sense then, relationships of power, force, and coercion are assumed absent when argumentative consensus is sought. This implies respect for two principles: universal respect as the recognition of all interested parties as participants in the argumentative discourse, and the recognition of equal rights to all participants concerning making an argument or challenging a validity claim. (2004, 296)

The level of deliberation, and the conditions for it to happen, can change across cases. Even in the same IO, participation and deliberation dynamics can vary in relation to each of the sectors or thematic areas it covers, although they are supposed to follow identical participation policies. The nature of the themes being discussed, the policy paradigms that prevail in relation to each of these themes or the bureaucratic culture of the different divisions that operate in the same organisation can affect the quality of external actor participation in IOs and, accordingly, their impact.

However, the level of deliberation and participation may also be affected by non-semiotic aspects, such as strategic alliances between external and internal actors, tensions and disagreements between principals and agents in IOs, periods of political and/or economic crises or the uncertainty that usually prevails when new themes are introduced into global agendas. All these elements can work as windows of political opportunity for external actors to make a difference in a range of international institutions (Campbell 2004; Finnemore 1996). Ultimately, though, whether these and other conditions are given, and whether participation is more or less genuine in the context of IOs, are empirical questions that research needs to address.

The case of the WBES2020 ‘Learning for All’

The WBES2020 deserves our attention due to the political impact of the Bank’s sector strategy papers on the field of international development. In particular, the impact of the education strategy paper is seen on two different levels – internal and external. At the *internal* level, the Strategy positions education as a sector that needs to play a central role in the Bank’s activity. Indeed, a significant effort is made in the document to justify the importance of education for development and to demonstrate high returns to investment in education, as a way to convince member countries – and the Board of Directors in particular – to give priority to education, rather than other sectors.

At the *external* level, the strategy contributes to positioning the Bank as the intellectual leader of education reform in the aid for development field. Education strategies aim at providing policy tools and programmatic ideas about how education transformation should be pursued in the developing world. In this sense, the 2020 Strategy is particularly ambitious. It attempts to move the focus of education reform further away from an inputs rationale to a reform agenda with outputs, governance and managerial solutions at its core. More specifically, it advocates: (a) the adoption of a *systemic* approach to education reform that strengthens the role of non-governmental players and incentives in education; (b) a more discernible focus on learning outcomes, which implies measuring school results in order to generate a knowledge base with which to inform policy-makers and families; and (c) the dissemination of innovative approaches and demand-side interventions that can contribute to improving learning outcomes effectively (Verger and Bonal 2012).

The consultation process behind the WBES2020 was conducted during 2010. It began on 27 January 2010 with the publication of a 15-page Concept Note. Subsequently, the Bank began a first phase of external and internal consultations that

spanned February–June 2010 and included 34 meetings in 24 different countries with representatives from 69 countries overall. The purpose of phase one was to consult with governments, academia, NGOs and donor agencies on the overall approach outlined in the Concept Note in order to address challenges and opportunities in the education sector in the coming 10 years. After phase one consultations, the Bank produced a complete first draft in October 2010 and then engaged in a second phase of consultations through November of the same year. The final version of the Strategy – after being refined and approved in late 2010/early 2011 – was published in April 2011.

In our view, in the context of the 2020 Strategy consultations, participants had the opportunity to provide feedback in relation to three main aspects: Priorities, procedures and policies. *Priorities* are the key themes and objectives that should be emphasised in the Bank’s education agenda; *procedures* refer to how the Bank should work at the operational level and through which coordination instruments; and *policies* are the specific solutions and education reform measures that should be promoted by the Bank to address the existing problems at the country level. [Table 1](#) details the questions around which the Bank organised the consultations in round one.

The participants: DfID, BMZ and MINBUZA

In the light of the participatory trends discussed in the previous section, we see that the consultations performed for the WBES2020 during 2010 extend a long trajectory of participation, which began in the 1980s, when NGOs started to partake in the design and implementation of Bank projects. However, while the involvement and impact of NGOs has been the subject of previous research, the influence of bilateral aid organisations on the Bank’s decision-making has not. In response, we focus in this paper on the role played by three aid agencies that are among the most active players of their nature in education policy-making in the Bank.² We discuss each of the participating agencies below.

The Federal Ministry for Economic Cooperation and Development (BMZ) is responsible for the creation of development cooperation policy and strategy on behalf of the German government. Separately, there is a wide range of agencies, governmental departments, federal states, NGOs and political foundations that are responsible for the implementation of Germany’s development cooperation. Thus, German official aid is characterised by separate entities for strategy development and policy implementation (OECD 2010a).

Table 1. Focus of questions during phase one of consultation for WBES2020.

Questions	Focus
1. What are the biggest challenges in the education sector in the coming 10 years?	• Priorities
2. How can the World Bank best support efficient, equitable and durable educational progress? In low-income countries? In fragile and conflict-afflicted states? In middle-income countries?	• Priorities • Policies
3. How can the World Bank effectively support improvements in the quality of learning and acquisition of skills?	• Policies • Procedures
4. How can the Bank work better with partners?	• Procedures

Source: Authors on the basis of World Bank (2010).

The MINBUZA serves as the hub of Dutch development cooperation. As such, it is directly responsible for 87% of Dutch development assistance and it fully coordinates the Dutch development effort in that it manages both policy development and implementation (OECD 2011).

The DfID is the organisation that leads all bilateral and multilateral poverty reduction efforts related to development cooperation for the government. It manages 86% of the UK's official development assistance (ODA, or simply 'aid') and is represented at the cabinet level by the Secretary of State for International Development (OECD 2010b).

These aid agencies have important similarities and differences, as summarised in Table 2. Not only is multilateralism viewed by all of them as highly important and as an effective channel for aid delivery, but also, throughout the years, all three donors have made large contributions to the multilateral system (including the World Bank, institutions of the United Nations and the European Union (EU)), dedicating

Table 2. Characteristics of IAAs, 2011.

Characteristics	BMZ	DfID	MINBUZA
Net ODA (current USD, billions in 2011)	14	13.8	6.3
% change to ODA compared to 2008	0.8	20.3	-9.3
Ratio of aid to gross national income (GNI) (in 2011, %)	0.39	0.56	0.75
Multilateral contributions as % of gross ODA	35	36 (in 2008)	25 (between 2007 and 2009)
Contribution to the Bank's trust funds (USD, billions, 2010 figures)	3	7	4.3
Aid priorities	(i) Sustainable poverty reduction; (ii) reducing structural deficits; (iii) encouraging civil society involvement; (iv) making private sector activities deliver for development; (v) enhancing the effectiveness of German development cooperation; and (vi) improving visibility	(i) Sustainable growth in the poorest countries; (ii) combating climate change; (iii) conflict prevention in fragile states; and (iv) efficiency and effectiveness of aid	(i) Security and the legal order; (ii) water; (iii) food security; and (iv) sexual and reproductive health and rights

Sources: OECD (2010a, 2010b), OECD/DAC (2013a, 2013b) and UNESCO (2012).

at least 25% of their gross ODA to it. Moreover, despite the global financial crisis, all three of them were among the top 10 ODA donors in 2011. When it comes to the allocation of funds in multilateral institutions, the EU (including the European Commission and the European Investment Bank) has received the highest ODA contributions from these three agencies, with the World Bank being next.

Importantly, the place of education within the priorities of these aid agencies is changing, just as is the focus within education itself. With the exception of BMZ, for which the priority of education remains strong, such issues as country security and fragility are taking precedence over the education sector (BMZ 2012; DfID 2010, 2011; OECD 2010a, 2011; UNESCO 2012). To continue, while MINBUZA and BMZ underscore the importance of a holistic and integrated approach to education and argue for the necessity to invest in higher, technical and vocational education, DfID is keen to invest 70% of its education funding (or 9% of its total aid) in basic education and plans to channel 50% of its bilateral education aid to fragile and conflict-affected states (DfID 2010; UNESCO 2012). Generally, however, these agencies are thought to be like-minded, an issue which, as we acknowledge below, may affect the generalisation of our results to other IAAs.

The participation of bilateral donors in and around WBES2020

Representatives from each of the IAAs participated in the different phases of the consultations. During this time, the IAAs circulated the Bank's concept note among their own staff, embassies and key stakeholders (including academia and civil society organisations), gathered feedback and provided it in oral and written form to the World Bank. The consultations themselves were characterised by a mixture of presentations and statements by IAAs, commentary by and dialogue with Bank facilitators, and a small group discussion among attendees. In an action that shows the closeness between the World Bank and both BMZ and MINBUZA, the latter two organisations facilitated consultation meetings on behalf of the former during phase two. Beyond these more public external consultations, two of the three IAAs also tapped their representatives on the Bank's Board of Directors to involve them in internal Bank discussions, as will be elaborated below.

All IAAs analysed appreciated the World Bank approaching them. Some of the interviewees felt that the conversations were meaningful and that the World Bank genuinely listened to and considered their feedback. One interviewee shared: 'We really feel that we were taken very seriously ... that it means something to the World Bank what we fed into the process' (IAA1, 02). Other interviewees, however, emphasised that the consultation process led by the Bank was an effort at compensatory legitimisation and a mechanism to reify extant knowledge:

The Bank used the process strategically as window dressing. However, the discussions were more than window dressing. There was openness. They were also reviewing the role of the Bank and were interested to get feedback. ... [But] they were also looking for affirmation of their policies. (IAA3 – Int01)

I don't think the expectations were high. People welcomed the fact that the event was held ... but I don't think much beyond that. Some of us feel that we [were] stating known knowledge ... So I think part of the consultation is not so much ... for us to really change their policies but ... for them to explain to us why they had made specific choices. (IAA2 – Int02)

To a large extent, the IAAs were aware of the limits of their participation and explained it in a number of ways. For example, they pointed to the numerous demands on their time and the need to prepare feedback quickly. As one IAA representative stated: ‘The general consensus was that it was a worthwhile exercise, but I don’t think anyone felt strongly that we had necessarily conveyed messages that are going to make a big difference’ (IAA2 – Int01).

Out of recognition of these limitations, the IAAs try to influence the Bank’s agenda through other routes, such as trust funds (IAA2-01, IAA3-01). In fact, one of the agencies made explicit that, more than via the consultations, their influence can be effectively channelled through this finance mechanism: ‘We have a policy partnership with the World Bank, in a trust fund. Obviously we have more influence than some other people. We have regular meetings with Beth King, Robin Horn. They listen to us, I think’ (IAA2 – Int01).

On this point, the Netherlands, Germany, and the UK are among the top 10 countries that contribute to trust funds at the World Bank (IEG 2011). They do this because they see it as an effective way not only to induce the Bank and the broader international community to pay attention to particular issues, but also to allocate unused funds from their budget at the end of the year.

Beyond the consultations themselves, an important part of the battle of ideas within the Bank takes place at the level of the executive board of directors. IAAs are aware of this and, as such, strategically employ the advocacy capabilities of their representatives within the Bank. However, they also acknowledge that participation and influence at this level is mediated by the actual power that member countries have. One IAA representative explains this well:

The way the World Bank works is that executive directors get their seat [at] the table proportionally to the share of their payment. I think the US ... their executive director is a very big shot. So it would be very unwise for the education division to not listen to the American vision. ... I am sure that an American comment would count much more than a [IAA3 country] one or even more than a Congolese comment ... It would be silly ... to say, ‘Well the Congolese guy said such an important thing’ if [the Bank education sector representative] cannot convince the American [Executive Director] that it is important ... So, [the Bank education sector representative] will obviously be sure that [they are] on board. (IAA3 – Int01)

Participation was further limited by the way the Bank structured the process. That is to say, while the Bank posed various open-ended questions to participants in the consultations – e.g. what the role of the World Bank should be over the next 10 years (see [Table 1](#)) – the structure of the process had a countervailing effect. Specifically, the Bank produced a lengthy concept note based on the expertise of its own education sector staff and the Education Sector Board before beginning the year-long process of dialogue with stakeholders (Steiner-Khamsi 2012). This had the effect of entrenching – through a seemingly neutral action – its perspectives and framework at the centre of the consultations, just as Samoff (2007) has described elsewhere.

Second, some fundamental aspects of the Bank’s approach to education were off-limits in the context of the consultations. This is clearly the case of the human capital approach, which predominates in the way the Bank has justified education investment since the end of the 1970s, and whose centrality has remained unaltered since then (Mundy and Verger, [forthcoming](#)). Thus, while IAA1 encouraged the Bank education sector staff to include a greater focus on the human rights approach

to education, the WBES2020 does not reflect this suggestion beyond a sentence in the introductory section of the Strategy that states: ‘Access to education, which is a basic human right enshrined in the Universal Declaration of Human Rights and the United Nations Convention on the Rights of the Child, is also a strategic development investment’ (World Bank 2011, 1).

Nevertheless, the World Bank did change some WBES2020 language as a result of the consultation process. In addition to the human rights example, some agencies consider that their feedback led to greater emphasis in the WBES2020 on such issues as higher education, the creation of linkages with other sectors (e.g. health) and the need to collaborate with a range of development partners, including civil society. Noticeably, though, the initial areas of emphasis highlighted in the concept note (specified earlier in this paper) were not altered.

To sum up, two observations can be made regarding IAA’s participation and influence in the construction of World Bank education policy. First, the consultation process allowed for the contribution of meaningful input from the IAAs. Second, while this input was heard and, to some extent, taken into account by the Bank’s education staff in charge of the consultations, the internal voting structure and the organisational culture of the Bank, and also the way the consultation itself was designed, made it difficult for the participants to threaten the centrality of the neoliberal framework through which the Bank understands education. Such structural and organisational issues represented important limits to the influence of bilateral donors in the context of WBES2020 consultations. However, we suggest that there is more to the picture. As we develop below, a number of other factors and conditions of possibility emerged which clearly limited the nature and substance of IAA participation in the WBES2020 consultations.

Additional factors affecting IAAs’ participation

Both the education division in the Bank and the education experts in aid agencies consider education to be a key asset in development processes. This shared assumption between the World Bank and aid agencies was very visible in the consultation meetings held in Europe. All wanted to make a point about the importance of education. However, once agreed upon, key policy debates should have started around such questions as: How should education be delivered, financed and by whom? What programmes can contribute to improving the retention and learning of disadvantaged populations? What should be the role of the state in education financing, provision and regulation? The findings presented below show that, in the context of the consultations, the IAAs did not address these questions fully – and issue upon which we also reflect.

As noted, in the context of the education consultations, the IAAs had the opportunity to provide inputs in relation to aspects such as priorities, procedures and policies (see Table 1). However, although the Bank raised a balanced number of questions in relation to each of these items, the consultations with IAAs focused predominantly on *procedures* and *priorities*. Very rarely did debates about specific *policies*, or even reflections about the policy preferences of IAAs, emerge. The feedback documents given by the agencies to the Bank in the context of the consultations demonstrate this idea very clearly.³ In the case of IAA1, most of the statements included were about *priorities*: The importance of skills and transition between education and work, the focus on quality and learning, the need to pay more attention to higher

education levels and so on. Out of the 52 total comments raised by this IAA, 35 referred to priorities (which represents 67.3% of the total). There were only 11 comments about policies, and 45% of them were in relation to technical and vocational education – the sector in which this IAA has developed further expertise.

Separately, the feedback document of IAA3 contained the results of a questionnaire given to education experts located in their country's embassies. Of the six points included in this document, five referred to *procedures* and, specifically, to the aid modality of the Bank. In this respect, they were quite critical with the way the Bank operates at the country level, due to the poor tradition of this organisation when it comes to the coordination and harmonisation of its practices. They requested that the Bank to act more 'as a team player at [the] country level' (IAA3-01), and that it respect further the principles of the Paris Declaration, which has been actively promoted by this agency. In terms of *priorities*, they encouraged the Bank to place greater emphasis on their work on helping fragile states and on tracking more intensively public budget expenditures. Documents summarising the consultation with this IAA – produced by the Bank itself – clearly indicate that these issues were the focus of the discussion, and that deliberation at the policy level was rather absent.⁴

In the consultation meetings with IAAs, a significant portion of the time was dedicated in offering a range of justifications related to the importance of education for development. This was not a contentious theme because, as stated previously, all the involved parties share this – now common – belief. Nevertheless, at a time when budgets in education for development are cut in many European countries, this was perceived as a useful exercise by the education experts of the aid agencies, who have to struggle against the foreign-affairs ministry and other divisions inside their own agencies to justify the necessity of investing in education.

By drawing on the expert knowledge of the Bank, the education experts of IAAs can enhance their profile and bolster their claims for more resources for 'their sector'. Such knowledge has a sustaining function (cf. Bowsell 2008) because spending in development cooperation – and in education for development in particular – is increasingly challenged by public opinion and some influential political and media groups in the context of the financial crisis that has been affecting Europe since 2008. The Bank's renewed emphasis on outcomes and learning in the 2020 Strategy was very welcomed by agencies in countries with growing public sentiments against external cooperation. This was clear in our interviews:

The previous government was focused on resources, [on] how much money [it] was committing. The new one is not talking about money but about what [development cooperation] is trying to achieve. That's partly because of the public annoyance about the fact that the development programmes in [this country] are being protected when domestic expending is not being protected. The new ministry doesn't think it is a good idea to say we are spending a tremendous amount of money in education in Africa when some people think that there is not so much spending at home. (IAA2 – Int01)

More discrepancies between the Bank and the IAAs arose when it came to defining which education levels should be given priority. The World Bank is still very path dependent from the era of the 'short education policy menu' (cf. Heyneman 2003), and it continues to focus its lending activity and policy discourse on basic and primary education (Mundy and Verger, [forthcoming](#)). Thus, several European aid agencies challenged the first draft of the Strategy for not paying sufficient attention to higher education and vocational training. For these aid agencies, key issues in the

education for development debate are, first, which education levels to prioritise and, second, in which (type of) countries they should focus their attention. From the point of view of IAAs, whose main concern is usually budget allocation, framing the consultations in these terms was more helpful than deliberating, for instance, about the most appropriate education reform approaches.

In the meetings, another commonplace between the Bank and the IAAs was that ‘learning’ should be a priority in future education agendas. However, apart from vague references – usually by the Bank – regarding the importance of introducing learning assessment systems, there was no theoretical discussion about what learning means, how learning happens or which policies are more appropriate to improve learning processes. When, in one of the meetings, the Bank representative was asked about what would be, in their view, the best pedagogies to implement, the representative simply responded that ‘there are better experts outside [the Bank] on this area [(i.e., pedagogy)], even UNESCO and the International Institute for Education Planning (...). This is not our comparative advantage.’

The Bank’s comparative advantage? Knowledge production for education reform

In the aid for development community, when it comes to defining *policy* solutions and, specifically, governance reforms, the Bank possesses a comparative advantage. To that end, as stated above, in the context of the consultations, its ideas on education reform were not challenged by the IAAs. The agencies ascribe significant authority to the Bank in this area, and, as such, reduced their participation in consultations by deferring to its expertise. As explained by the interviewees, this comparative advantage is the result of a number of factors. First, IAAs are aware that the geographic reach of the Bank, as well as its capacity to bridge different policy sectors, is much greater than theirs. The Bank can, in the words of one interviewee, address ‘bigger picture issues’ (IAA2-01), unlike most bilateral aid agencies. At the country level, IAAs work basically with the ministry of education, which ‘does not control procurement processes or is not the one to hire and fire staff’. In contrast, the Bank ‘works with ministries of finance, they work on procurement regulations, they work on audit so that is also where they can really make an input’ (IAA3 – Int01).

Second, the knowledge-production capacity of the Bank in the field of education for development outstrips that of other aid agencies. In fact, at the same time that the Bank is increasingly investing in research – oftentimes via IAA Trust Funds – and reinforcing their reputation in the education reform field, many IAAs are decreasing their knowledge base in education by hiring more and more generalists who frequently change sectors during their careers. This dynamic makes the aid agencies increasingly dependent on external, specialised knowledge, like that provided by the Bank. As stated by one of the interviewees, ‘many agencies have gone too far in the direction of feeling that they don’t need sector policy experts’ (IAA2 – 02, see also OECD 2011).

Each of the European IAAs in this study also considers the World Bank to be a more reliable reference on education policy than UNESCO, which is, paradoxically, the only United Nations agency with an education mandate. With the exception of the ‘Education for All’ Global Monitoring Report, all agencies interviewed were very critical of UNESCO’s knowledge products and dissemination strategies. World Bank publications are also preferred to the knowledge products coming from universities. Unlike the academic world, wherein individuals are usually reluctant to identify and promote policies that ‘work’, the Bank is very assertive when it comes to reducing

complexity and prescribing policy recommendations to practitioners. The World Bank understands the knowledge needs of IAAs and has the capacity to package research outcomes in a way that is more appealing, accessible and policy-oriented than is typical of academics. As stated by an interviewee:

They think like us ... the World Bank, being a donor itself, sometimes understands quite well the financial issues. UNESCO tends to be very broad and always ends that more money needs to come. While the World Bank, they know that the money is not going to come ... They are much sharper and they pose the economic question: We only have one dollar so do we spend it on buying the book, or training the teacher? A lot of their analysis is formulated in that way which is practical if you are in the field. (IAA3, Int01)

Aid agencies also told us that they do not have time to go through academic publications and to be up-to-date on the education for development literature, and thus usually rely on the knowledge-broker role played by the Bank.

If the World Bank is referencing Hanusheck a lot, we think that might be something that we really want to read. With such a long literature list, if a specific title comes up a number of times then we might say this might be an academic study that we are interested to look at. I think most of us read meta-analysis done by these large organisations rather than the source which would be in the international journals. (IAA3, Int01)

Furthermore, World Bank publications are not only widely available but are sent by the Bank itself directly to the IAAs, who then share them with their field staff: 'the Bank sends all of its publications in a CD annually, which are copied 50 times by the Ministry and sent to everyone working in the field' (IAA3, 02).

We also found that IAAs attribute a great deal of authority to the Bank because of the high qualifications of its staff. In the interviews, there were continuous references to how 'professional', 'smart' and 'bright' the Bank officials are, in addition to statements that indicate the weight given to Bank recommendations. On this point, consider the following statements:

How many people do we have here working on education? Fifteen. They [the Bank] probably have 150–200 people. Probably with PhDs from Harvard and Columbia. Nothing wrong with [our] universities, but they are different institutions from those bright kids who get Harvard and Stanford PhDs. (IAA3, Int01)

If the World Bank says, 'ok, this is really a neglected subject,' I think that people would really focus on it more, if they feel that, ok, very smart and intelligent people at World Bank think that this is an important issue to concentrate on, maybe we really have to draw our attention towards that. (IAA1, Int01)

Beyond the perceived quality of their products, however, Bank knowledge is also useful in terms of legitimisation, and this also contributes to participation of a more passive nature in consultations. By referring to Bank sources, IAAs can argue more strongly before their principals for certain priorities and preferences:

The advantage also is that it is easy for us when we use World Bank or IMF or some American think tank for that matter. It is much easier for us to convince our decision makers. Ambassadors, directors general, that sort of people ... they would be much more impressed when the World Bank says ... than if I say, well, Oxfam says ... (IAA3, Int01)

Of course, this is not to suggest that the IAAs are never critical of World Bank research. The Bank is well known for embracing, predominantly, a neoclassical economic approach to public sector reform (Broad 2006; Rao and Woolcock 2007), and its research is inclined to demonstrate that strengthening the role of the private sector and introducing market solutions are the best ways to promote economic development and public sector reform (Bull and McNeill 2007). The international agencies interviewed are aware of the, in their own words, ‘neoliberal’ and ‘ideological’ bias of the Bank (IAA1, 02; IAA3, 01). However, when asked why they did not challenge the pro-market assumptions of the Bank in the context of the consultations, they suggested that the reason they did not do so was because, currently, their governments have a conservative economic orientation that does not differ much from that of the Bank. Challenging the Bank in this area thus would have contradicted the preferences and will of their current principals (i.e. governments), who agree with the neoliberal development agenda and are actively implementing it at home (IAA1, 01).

The final, and not inconsequential, element that interfered in the quality of the policy discussion within the participatory processes relates to IAA expectations. That is, the priority of many participants, far from providing the Bank with feedback, was to get in-person information from the Bank about future trends in education for development. Thus, many attended the meetings to passively listen to the Bank staff and were not equally eager (or prepared) to discuss their specific policy preferences. In one of the meetings, the Bank representative openly complained about the fact that she was receiving numerous questions from the audience rather than inputs and reminded the participants that ‘this is a consultation meeting, we came here to hear from you, not to tell you what to do.’ One of the participants responded, without maliciousness, ‘but you are the Bank, you are the one who knows, you should be telling us what to do, you should advocate more strongly for things.’ To some degree, the Bank’s efforts in the consultations to solicit and recognise feedback from the IAAs seem to have surprised IAAs’ officials themselves. For many of them, telling the Bank which policies it should adopt was inconceivable, particularly given the predominant position of this IO in the aid for development field.

Conclusions

This case study on the role of IAAs in the context of the WBES2020 consultations has allowed us to explore the nature and quality of participation in the World Bank’s consultations, as well as the extent to which the Bank is open to external voices when it comes to defining its policy strategies in the education field. At the moment of assessing the quality of democratic participation in such consultations, we have witnessed that a significant effort was made to promote the inclusiveness and transparency of the participatory process. The consultations reached hundreds of stakeholders from all around the world. Since many organisations, especially NGOs, cannot afford travelling to DC, the Bank staff visited 69 different countries and organised local consultations there. Among the attendees, we mostly found like-minded organisations; those that openly oppose the Bank’s ideas in education were scarce. However, in most countries, the host organisation was the one deciding which partners to invite, so, when the level of inclusiveness has been restricted, this cannot be solely attributed to the Bank. Furthermore, relevant and up-to-date documentation was constantly available to all partners and the evolution of the consultations could be tracked easily via a very complete website and different forms of social media.

More limitations were observed in terms of the way the exchange and justification of ideas happened and, consequently, in the responsiveness of the Bank to such ideas. The agencies analysed in this study focused their commentary on what we define as priorities and procedures, but not so much on policy issues. By not challenging the Bank at this level, the aid agencies left significant space for the Bank to include and globally disseminate its preferred policy prescriptions. For the reasons explored here, while the Bank did invite agencies to discuss concrete education policy strategies, they did not use this as an opportunity to contest the Bank's thinking. Both the position the Bank occupies and the authority ascribed to it in the education for development field contribute to its dominance and help to preclude the participation of other stakeholders, including IAAs, from leading to either substantive policy changes or to challenging feedback.

We furthermore suggest that an additional element which contributed to IAAs' consent within the analysed process is that the WBES2020 serves as a manifesto in favour of education for development. This feature of the Strategy enhances its popularity not only among aid agency education experts, but also within Southern education ministries, since it justifies and emphasises the importance of 'their' sector. In a context of limited resources, in which different state factions fight more intensively than ever to bring more resources to their terrain, the WBES2020 is welcomed as a legitimisation tool for those agents who advocate before both their governments and their societies for the centrality of education within development strategies and state budgets.

It should be noticed that, in the context of the consultations, IAAs can be seen as a *sui generis* (i.e. unique) actor due to its dual nature: many IAAs participated in the meetings following the same procedures as other external actors (e.g. NGOs, activists or independent scholars), but, at the same time, they also represent governments that have formal authority within the Bank. IAAs are, moreover, direct (and increasingly important) financial contributors to the Bank via trust funds. Consequently, they have a relation with the Bank of mutual dependence. Such financial and political links have the potential to alter the application of deliberative democratic principles since, as many IAAs interviewees highlighted, Bank staff will listen more or less to their arguments according to the voting power of their countries within the IO's governance structure or to the amount of trust funds they provide.

In the end, the IAAs had an ambiguous position concerning the participatory processes behind the 2020 Strategy. In general, they welcomed the Bank's effort to incorporate their opinion, but they were also aware of their limitations to substantively influence the Strategy content. Thus, independently of how much the World Bank has learned from other stakeholders' ideas, we find that the WBES2020 consultation process has served as an effective technology of power for this IO to gain legitimacy within the donor community and among other important constituencies, as well as a mechanism by which to disseminate their policy ideas and preferences. In this respect, the consultation process shows that the IAAs have become not only a key recipient of the Bank's dissemination strategies but also, and more importantly, a key circuit that contributes to the reproduction of the Bank's predominance in the education for development field.⁵

To conclude, inclusiveness and transparency are necessary but not sufficient conditions for a more democratic and participatory (global) governance. Empathy and a willingness to engage with alternative ideas would also be necessary – not only at the level of priorities and procedures, but also at the level of policies and reform paradigms. One (pre)condition for this to happen would be Bank staff recognising the

participants as equals or, at least, as actors who can contribute valuable knowledge in deliberations. While our empirical data do not allow us to conclusively assess whether recognition worked in this way, we did find that an additional challenge relates to the participant self-image. That is, IAAs – and likely other participants – have a tendency to perceive themselves as subordinate knowledge actors when engaging about policies for education reform with the Bank.

Notes

1. See <http://go.worldbank.org/C17JY55C90>. Accessed 7 February 2013.
2. Although we use the concept ‘aid agency’ to refer to the three analysed actors, only DfID can be considered as a proper agency. BMZ and MINBUZA represent Development Cooperation Ministries in Germany and The Netherlands, respectively.
3. We were able to access and analyse the feedback documents of two out of the three agencies.
4. See minutes of the meetings in: <http://www.web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTEDUCATION/0,,contentMDK:22490522~menuPK:282402~pagePK:210058~piPK:210062~theSitePK:282386,00.html>. Accessed 13 April 2013.
5. A note of caution concerning the generalisation of our results is that we have taken agencies that not only have a long tradition of collaboration with the World Bank. The situation may be different in relation to Nordic or Southern European agencies, for example.

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