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The Development Imaginary: Analyzing development discourse in the World Bank Education Strategy 2020 through contemporary theories of development and education

Master's thesis in education

FACULTY OF EDUCATION
Intercultural Teacher Education

2016



Faculty of Education

Thesis abstract

Intercultural Teacher Education		Authors Herrera, Anna Paula & Vuollo, Eevamaija	
Title of thesis The Development Imaginary: Analyzing development discourse in the World Bank Education Strategy 2020 through contemporary theories of development and education			
Major subject Education	Type of thesis Master's thesis	Year May 2016	No. of pages 81
Abstract <p>Different understandings of development and education have great socio-political implications on nations worldwide. These understandings are reflected in policy discourses. It is important to critically analyze discourses since they can unintentionally reinforce inequality in power-relations. As the World Bank's policy influences a vast number of countries and their education reforms, this study focuses on analyzing its discourse on development and education.</p> <p>The aim of this study is twofold: firstly, we strive to understand different approaches to development and education by examining various theoretical perspectives. Secondly, we shed light on the ways in which the World Bank Education Strategy 2020 (WBES2020) portrays development and education. Our theoretical overview of the different theories is the starting point for providing an informed critique of the Strategy. This is a qualitative study informed by a combination of critical theory, poststructuralism, and postmodernism.</p> <p>In our theoretical framework, we elaborate on the plurality of approaches to development and education. We discuss five different theories of development: development as economic growth, as modernization, as redistribution of power, as dependency, and finally development as freedom. We shall also give an overview of the World Bank as an institution, briefly explain how it became involved with education, and explain its contemporary position as the major financier of development and education.</p> <p>Our empirical framework is based on Critical Discourse Analysis, which enables the deconstruction of underlying assumptions regarding development and education in the policy discourse. In the analysis, we distinguish six recurrent discursive patterns that constitute two predominant narratives in the policy discourse of the specific World Bank strategy.</p> <p>Based on our analysis, we conclude that the notions of development and education in the discourse of WBES2020 are predominantly constructed within the understandings of development as economic growth and modernization. We base this claim on our Critical Discourse Analysis that draws from the theoretical understandings of diverse development theories. Policies are not merely texts, but also discourses that create reality. As development is a complex concept inseparable from culture, values, ethics, politics, and power-relations, developmental agenda should always be open for democratic debate and dialogue.</p>			
Keywords: Theories of development, education policy, Critical Discourse Analysis, World Bank			



Intercultural Teacher Education		Tekijät	
		Herrera, Anna Paula & Vuollo, Eevamaija	
Työn nimi			
The Development Imaginary: Analyzing development discourse in the World Bank Education Strategy 2020 through contemporary theories of development and education			
Pääaine	Työn laji	Aika	Sivumäärä
Kasvatustiede	Pro gradu-tutkielma	Toukokuu 2016	81
Tiivistelmä			
<p>Erilaisilla käsityksillä kehityksestä ja koulutuksesta on suuria sosiopoliittisia vaikutuksia kansakuntiin ympäri maailman. Näitä käsityksiä on mahdollista löytää poliittisista diskursseista. On tärkeää analysoida diskursseja kriittisesti, sillä ne voivat tiedostamatta vahvistaa eriarvoisuutta valtasuhteissa. Koska Maailmanpankin politiikka vaikuttaa suureen määrään maita sekä niissä tapahtuviin koulutusreformeihin, tämä tutkimus keskittyy analysoimaan sen diskursseja kehityksestä ja koulutuksesta.</p> <p>Tämän tutkimuksen tavoite on kaksiosainen: ensiksi haluamme ymmärtää erilaisia käsityksiä kehityksestä ja koulutuksesta tutkimalla erilaisia teoreettisia lähestymistapoja. Toiseksi, selvitämme Maailmanpankin uusimman koulutusstrategian (World Bank Education Strategy 2020) tapoja esittää kehitys ja koulutus. Teoreettinen katsauksemme erilaisiin teorioihin on lähtökohta kriittiselle analyysille Maailmanpankin koulutusstrategiasta. Tämä on kvalitatiivinen tutkimus, joka perustuu yhdistelmään kriittisestä teoriasta, poststrukturalismista ja postmodernismista.</p> <p>Teoreettisessa viitekehityksessämme esittelemme kehityksen ja koulutuksen teorioiden moninaisuutta. Keskitymme kuvaamaan viittä erilaista teoriaa kehityksestä: kehitys taloudellisena kasvuna, modernisaationa, vallan uudelleenjakamisena, riippuvuutena, ja lopuksi kehitys vapautena. Lisäksi kuvaamme lyhyesti Maailmanpankkia instituutiona, kerromme miten koulutus tuli osaksi sen toiminta-alueetta ja avaamme Maailmanpankin nykyistä asemaa suurimpana kansainvälisenä koulutuksen ja kehityksen rahoittajana.</p> <p>Empiirinen viitekehityksemme perustuu kriittiseen diskurssianalyysiin, joka mahdollistaa poliittisessa diskurssissa piilevien kehitykseen ja koulutukseen liittyvien oletusten purkamisen. Erottelemme analyysissämme kuusi toistuvaa diskursiivista mallia, jotka muodostavat kaksi laajempaa, hallitsevaa narratiivia Maailmanpankin kyseisen asiakirjan poliittisessa diskurssissa.</p> <p>Analyysimme perusteella toteamme, että Maailmanpankin koulutusstrategian käsitykset kehityksestä ja koulutuksesta ovat pääosin sijoitettavissa teorioihin, jotka ymmärtävät kehityksen taloudellisena kasvuna ja modernisaationa. Väitteemme perustuu kriittiseen diskurssianalyysiimme, joka puolestaan pohjautuu ymmärrykseemme erilaisista kehitykseen liittyvistä teorioista. Poliittiset linjaukset eivät ole pelkästään tekstiä, vaan myös diskursseja, jotka luovat todellisuutta. Tämän takia on tärkeää tarkastella kriittisesti tapoja, joilla kehitystä ja koulutusta kuvataan poliittisissa asiakirjoissa. Koska kehitys on monimutkainen käsite, jota ei voida erottaa kulttuurista, arvoista, etiikasta, politiikasta, tai valtasuhteista, kehitystyön tulisi olla aina avointa demokraattiselle keskustelulle ja dialogille.</p>			
Asiasanat: Kehitysteoriat, koulutuspolitiikka, kriittinen diskurssianalyysi, Maailmanpankki			

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1 Introduction

The idea of *development* is a frequently appearing concept in contemporary international educational policies. In this study, we also focus on issues related to development, with an emphasis on social development instead of for instance individual human development. As this thesis is situated in educational studies, we shall look at the interconnectedness of development and education. Development work has been engaged with education in formal, non-formal and informal spheres, as there seems to be consent on the fact that life for everyone should be the best possible. The relativity and locality in the understandings of development needs to be emphasized, as there is a tendency to generalize conceptions of both development and education in policy discourse. This tendency often also applies to educational reforms. The ways in which development and education are perceived are connected to different ways of seeing the world, and hence, there are a number of different theories regarding both development and education.

Our interest in focusing on development and education policy derives from our personal experiences as Intercultural Teacher Education students, as well as from our epistemological standpoints as researchers. Having studied about different educational systems, as well as having had the opportunity of being involved in a variety of educational contexts during our studies, we have become aware of the need to increase genuine dialogue in the making of educational policy. We find it important to challenge policies and practices in development and education, as they can reinforce inequality in power relations and neglect diversity. In our bachelor's thesis in 2014, we discussed complexities of epistemological ethnocentrism in education, and during our research process we noticed the significance of the World Bank in educational policy. Therefore, we decided to focus on analyzing the Bank's most recent educational strategy in this study.

The World Bank published the World Bank Education Strategy 2020 (WBES2020) called "Learning for All: investing on people's knowledge and skills to promote development" in 2011 (see World Bank, 2011). This strategy is a continuation to the larger campaign of Millennium Development Goals that were committed to a set of objectives to be achieved by the year 2015. The WBES2020 is the World Bank's updated approach to educational policy and development, and includes the rationale and proposed actions that World Bank's client countries are to take in order to boost development. The document has had

great impact on a number of nations and their educational reforms, and, as such, the discourse it embodies and the educational ideology it represents should be critically examined.

There are multiple aims for conducting this study. Although the WBES2020 has already been researched by a number of scholars, we want to engage in this academic debate concerning the influential policy document. Through our analysis, we wish to bring additional perspectives on the critical examination of the World Bank education policies. Using the method of Critical Discourse Analysis, we aim to understand and deconstruct the underlying assumptions regarding development and education in the WBES2020 discourse. However, in order to provide a comprehensive critique of the Strategy, we need to understand various approaches to development and education. Highlighting this plurality of theoretical perspectives is also an important aim of this study as such. By discussing the diverse ways of understanding development, we wish to question conceptions of progress that are often taken for granted, and to present some emancipatory views on education and development.

1.1 Locating the Study

This study draws on previous research from academics such as Steven Klees, Joel Samof, and Nelly Stromquist, who published a book in 2012 with a specific focus on the World Bank and its Education 2020 Strategy. Also, our motivation to study World Bank policy in more detail derives from our previous readings from William Easterly, a former World Bank economist, and from critical alternatives for neoliberalism that were proposed at the World Social Forum in the turn of this century (See Fisher & Ponniah 2003). Also, research by Roberto Leher, Sarah Babb, and Stephen Heyneman provided valuable insights on the World Bank as an institution and shaped our understandings of its relationship with development and education.

During this research process we broadened our understandings of the World Bank as an institution, but before engaging in our Critical Discourse Analysis of the Education Strategy 2020, we did not want to focus much on previous research on this specific document. We decided to first conduct our own analysis in order to avoid guiding our own

findings of the Strategy by the interpretations of others. After our analysis, we read other research regarding the WBES2020 in more detail, and despite the great number of previous analyses on the Strategy, we find it important to take part in the dialogue in the broader research community to reimagine multiple ways of understanding education and development. With our interpretations combined with the broader theoretical framework of this study, we hope to provide some new insights on the World Bank discourse of development and education, and intend to emphasize the ideological aspects of all education policy. In our discussion chapter, we shall draw together our own findings and some of the previous work of these scholars.

1.2 Research Questions

Genuine attempts to make things better within the existing structures of economic and cultural power are too often transformed into new sets of mechanisms for social stratification (Apple in Gur-Ze'ev 2005, p. 99). Unless educational policies are critically examined within their socio-political implications at the local level and with an understanding of their historical contexts, inequality in power-relations can unintentionally be reinforced.

The research question for this study is twofold. We shall analyze the conceptions of development and education in the WBES2020, but in order to be able to provide an informed analysis of the World Bank policy discourse, we felt the need to first understand a variety of ways of conceiving development and to distinguish different kinds of roles given to education within these approaches. Therefore, we start by providing a theoretical framework of different approaches to development and education, followed by our empirical analysis of the WBES2020. Our research questions throughout this thesis are as follow:

- How is development understood within different theoretical approaches and how are these notions reflected in understanding education?
- How does the World Bank Education Strategy 2020 construct notions of education and development?

By first understanding different approaches to development and education, it is possible to distinguish prevalent discourses in a policy document such as the WBES2020. One aim of this study is to understand and deconstruct underlying assumptions regarding development and education in the Strategy, but also to propose alternative and emancipatory views on education and development. We will use Critical Discourse Analysis as our method, informed by a combination of critical theory, poststructuralism, and postmodernism as our research paradigm. The study is qualitative, as qualitative research enables the study of dimensions of development that are not numerically quantifiable, as well as encourages local communities' ideas on the meaning and relevance of what development is (Willis 2005, p. 13).

As methodology is crucial for all research, we shall start by clarifying our research methodology in chapter two by describing our paradigm and by defining some key concepts. Chapter three shall provide answers to our first research question by describing different theories of development and education, and finally provides a brief overview of the World Bank as an institution and of how it got involved with education. Chapter four consists of our empirical framework, including a concise description of our research method, Critical Discourse Analysis, followed by the results of our analysis and interpretation of the WBES2020. In chapter five, we shall discuss some ethical issues and trustworthiness of this study, and end with final discussions in chapter six, where we draw together our theoretical and empirical findings while presenting some emancipatory visions for development and education.

2 Methodology

2.1 Research Paradigm

It is important to make our own underlying assumptions as researchers explicit as they have major influences in conducting qualitative research. Our epistemological assumption is that knowledge is constructed in relational processes, and therefore academic research is also a construction inevitably affected by the researcher's interpretations of the world. Knowledge is a product of specific societies and can also be a medium of power, and therefore the academic enterprise cannot be about the discovery of one single truth, but rather about constructing it (McBride in Andreotti 2006, p. 18). We do not argue that no absolute truth could exist, but our perspective to research is that researchers will always carry their cultural and personal biases with them, and in this sense research cannot reach one ultimate truth. Also, due to the nature of this study, we do not find it meaningful to strive for artificial neutrality, but rather wish to critically deconstruct and challenge the hegemonic structures in educational policy discourse based on our own interpretations and understandings.

The theoretical framework for this study can be placed somewhere in the intersections of poststructuralism, postmodernism, and critical theory. We find all of these approaches useful for the purposes of this study, as they all bring meaningful insights and widen our approaches to power-relations in policy discourse while providing emancipatory alternatives. Firstly, poststructuralism offers the basis for deconstructing binary categories and unveiling underlying power structures that are often taken for granted in discourse. As this study adopts Critical Discourse Analysis as one of its main methods, poststructuralism provides the framework for examining language as inseparable from larger, overarching power structures. We shall carefully analyze the World Bank's policy discourse on education and seek to shed light on some underlying assumptions by carrying out careful deconstruction characteristic to poststructuralism.

Secondly, this study falls in the framework of postmodern perspectives as it aims to change ways of thinking rather than call for direct action. Knowledge claims must be set within the conditions of the world today and in its multiple perspectives; an idea that is central to postmodernism and to this study. (Creswell 2013, p. 27) Rather than aiming to propose

some clear-cut suggestions for action, we wish to promote appreciation for genuine dialogue, diversity and interculturality in education, and therefore want to focus on changing ways of thinking. We do not wish to provide top-down action driven solutions, since we believe the action should rise from within the communities affected by the educational policy in question. Engaging in what Apple (in Gur'Ze-ev 2005) calls the act of repositioning, we wish to highlight how “the best way to understand what any set of institutions, policies, and practices does is to see it from the standpoint of those who have the least power” (p. 99). With a postmodern lens we aim to challenge the hegemonic assumptions of epistemology in policy discourse.

Thirdly, this study draws largely on the ideas of critical theory, as it is, according to Giroux (2001) concerned with furthering social and economic justice while committing to make multicultural democracy operational (p. 3). It has been argued that there is not one unitary Critical Theory, but that throughout time critical theory has rejected the static boundaries between disciplines, and proves the interdependency and connection between economics, policies, philosophy, culture and society (Kellner 1989, p. 7). Critical theory has been understood as an interdisciplinary and multidimensional field of studies whose principal aim is social transformation through deconstruction of normative discourses. Critical theory presupposes that one cannot discuss politics without discussing economics, and, as Freire has broadly argued, one cannot discuss education without discussing politics (Freire 2001, p. 52). Critical theory has been described as “the detecting and unmasking of beliefs and practices that limit human freedom, justice and democracy” (Usher, Bryant & Johnson in Andreotti 2006, p. 16), which seems to describe well the aims of our thesis.

We relate to the ideas of critical theorists such as Paulo Freire and Michael Apple who are also committed to critical pedagogy as a specific area of critical theory. The word ‘critical’ often carries with it some negative connotations, but as Peters (in Gur-Ze’ev 2005) explains, the word originally appears in critical theory, where it referred to social theory that was self-reflexive. This means that it could account for its potentially transformative effects and its conditions of possibility. Peters also highlights how critical theory focuses on the causes of oppression and strives for emancipation by improving the self-understanding of the social agents who seek for transformation. (p. 38) Geuss (1981) argues that the ultimate aim of critical theory is to create self-consciousness through enlightenment and emancipation. It distinguishes itself from other theories by having theorists as agents of their own object of study. Drawing on Habermas’s ideas, Geuss

describes emancipation as the liberating process through which individuals go from the state of *false consciousness* towards freedom of existence. (p. 58) By studying and analyzing a wide range of development theories through a critical lens, we hope to engage in academic discussions that have the potential of opening a window to such freedom.

As this study is centrally concerned with education, we also locate our study within the framework of critical pedagogy as a critical theory concentrating specifically on education. One of the pillar assumptions of critical theory is that theory cannot be separated from practice. Bourdieu (in Rexhepi and Torres 2011) summarizes the role of critical theory by stating that “the whole edifice of critical thought is thus in need of critical reconstruction” (pp. 690-691). Freire (2005) synthesizes the dialectic enterprise of critical thought and action with the concept of *praxis*, through which reflection leads to awareness of the oppressive structures of society, hence awakening the will for action and transformation (p. 51).

It is for that reason that critical pedagogy is the logical consequence of critical theory, as education takes place in every cultural aspect of society. Critical pedagogy utilizes conceptual critiques towards education and schooling as motivation for understanding a hopeful pedagogy which strives to foster a more equitable and just society (Heilman in Gur-Ze’ev 2005, p. 115), and promotes epistemological and ontological understandings central to educational policy and practice (McLaren & Kincheloe 2007, p. 17). Paulo Freire (in Rexhepi & Torres 2011) indicated that critical pedagogy needs to be reinvented, acknowledging that instead of a mechanic repetition of ideas, pedagogy should be expanded and adapted purposefully to specific contexts (p. 682). Also, Freire introduced the concept of dialogue to the core of what he called liberating or emancipatory pedagogy. Dialogue has consequently become central in the praxis of critical pedagogy in general. (Burbules in Gur-Ze’ev 2005, p. 193) It is important that researchers as advocates of critical pedagogy emphasize that questions of justice, power, and praxis in education cannot have any simple, universally applicable answers due to the complex and contextual specificity of these questions (Kincheloe in McLaren & Kincheloe 2007, p. 16). Therefore, this study will not aim to provide any simple, clear-cut answers, but rather to challenge these simplifications and to draw attention to the need for genuine dialogue in educational policy.

The critique often addressed at our previously described approaches to research points out to the danger of falling into absolute cultural relativism. If everything is relative and contextual, the common argument is that it is impossible to make any moral statements, a dimension indeed worth drawing attention to especially dealing with a fundamentally ethical and moral field such as education. However, we see this dilemma as a misunderstanding of the aforementioned theories. Balarin (2008) argues that the fear of falling into absolute social relativism can often lead into overlooking issues of power in the definition of knowledge. Adopting social realistic conceptions in the fear of possible relativism may have the risk of developing a foundational form of knowledge that might ignore otherness and difference, possibly leaving alternative conceptions of the world undervalued or overlooked. This can result in the perpetuation and reproduction of social inequalities, leaving concerns for social justice unresolved. Rather than falling into absolute relativism, poststructuralists, postmodernists, and critical theorists wish to emphasize the diversity of people and the complexity of issues related to social inequality. (p. 510)

As we have described, this study embraces not only one theoretical approach, but three approaches that all bring different, valuable viewpoints to our policy analysis. Our research method will be largely based on a Fairclough's framework of Critical Discourse Analysis that we shall describe later on in more detail in our empirical framework. However, as power and discourse are central aspects to both our research paradigms and our research method, and as ideology is fundamentally interconnected with policy, we shall next explain two key concepts for our study: discourse and ideology.

2.2 Defining Discourse and Ideology

"Every time a discourse moves, there is space for ideology to play" (Bernstein 2000, p. 9)

When looking at education policy-making, it is always useful to be aware of the ideologies that education policy-makers and implementers drive since ideology shapes the deepest assumptions of the nature of education, constituting a set of values and attitudes relating to the essence and purpose of educational processes. Ideologies largely deal with

representations that are grounded in our belief systems, and these representations are often the basis for discourse amongst other social practices (Van Dijk, 2006, pp. 119-120).

As Apple (1990) points out, defining ideology is often found problematic. Ideology is regularly referred to as a “system of ideas, beliefs, fundamental commitments, or values about social reality” (p. 20) or as Althusser (1971) defines it, a system of ideas and representations enrooted in the existence and history at the core of a given society (p. 149). Drawing on Van Dijk’s (2006) definition, we wish to emphasize the social dimension of ideology, meaning that firstly, ideology is a set of beliefs, and secondly, these sets of beliefs are socially shared in a community (p. 116). These concise definitions of ideology are mere passages of wider explanations, but they are useful in understanding the essence of ideology. However, as it is a complex concept, they are not descriptive enough as they overlook the functional dimensions that are central to the concept. Here we shall extend on our definitions of ideology that are fundamentally concerned with epistemologies and power-relations.

It has been argued that ideology can be categorized into at least three different dimensions. Firstly, ideology can be seen as distinct rationalizations of specific groups, such as professional ideologies; secondly, it can be understood as wider social movements or political programs; and thirdly, as holistic world-views, that some have called *symbolic universes* (Apple 1990, p. 20). Our definitions of ideology draw mostly on the third category of worldviews, understanding ideology as a comprehensive lens that encompasses epistemological and ontological dimensions.

McClure and Fischer (in Apple 1990) describe three issues that characterize ideology: legitimation, power conflict, and a special style of argument. Legitimation serves the purpose of justifying actions and beliefs through rationalizing the interests of a group. (p. 21) Legitimation of the beliefs and actions of a group of people happens through discourse, which is the mechanism through which ideologies are also acquired (Van Dijk 2006, p. 121). In this sense, legitimation maintains the underpinning assumptions unchallenged, as it is the apparatus through which something is considered to be right by principle. Power conflict deals with issues related to the distribution of authority. The style of argument is important for analyzing discourse, as ideology is found and contained in the underlying structures of language (McLellan 1995, p. 61). However, ideology cannot be reduced to mere discourse. Instead, ideologies can be seen as foundational beliefs that construct

shared social representations that in turn are the basis of discourse. (Van Dijk 2006, pp. 120-121)

The Foucaultian notion of discourse is essential for the purposes of this study. Discourse, as expressed by Foucault (1995), sets out the boundaries of what is to be silenced, excluded or desired. In critically analyzing discourse, it is not only important to analyze what is said, but also what is silenced and excluded in the text. As Foucault emphasizes, “in every society, the production of discourse is controlled, selected, organized and redistributed by a certain number of procedures whose role is to ward off its powers and dangers, to gain mastery over its chance events, to evade its ponderous, formidable materiality”. (p. 52-53) Discourse is in close relationship to the notion of knowledge, as it limits the specter of what is thought to be real and what is merely a belief, and refers to the social and cultural practices that are taken as a norm, shaping what can be said in a specific society (Sheppard et al. 2009, p. 52). Discourse is the process through which social reality comes into being, articulating knowledge and power into visible and expressible phenomena (Escobar in Rahnema and Bawtree, 1998, p. 85). We shall also often refer to hegemonic discourses in this study drawing on Gramsci’s idea of a worldview that is normalized as common sense (Gramsci in Peet & Hartwick 2009, p. 176).

It is important to bear in mind that while ideologies indeed constitute discourse, the relation between ideology and discourse is by no means simple or direct. Discourse is not necessarily ideologically transparent, and we cannot always understand peoples’ ideological beliefs by analyzing discourse. We, as Van Dijk (2006), understand ideological discourse as personally and contextually variable and we grant that individuals do not automatically express or enact the ideology of the groups they identify with (p. 124). It is important to understand ideology on a general level to be able to recognize and analyze discourse in dominant groups instead of accepting the discourse as the inevitable truth (p. 132).

3 Theoretical Framework

The purpose of this chapter is to shed light on the plurality of approaches to development. The aim of the first section, *Theories of development and education*, is to generate an understanding of the variety of both development and education, aiming to respond to our first research question. Furthermore, it will allow for a more comprehensive approach towards the analysis of the discourse of the World Bank Education Strategy 2020 later on in chapter four. The second section of this theoretical framework, *World Bank, Development and Education: an overview*, aims to give a general overview of the role of the World Bank in the field of education and development in the past decades. By presenting some aspects of development theories on the one hand and the World Bank's overview on the other, this study strives to offer an informed and holistic understanding of the WBES2020. Furthermore, this empirical framework can be useful for critically analyzing other developmental and educational policies that affect our everyday lives in unimaginable ways.

3.1 Theories of Development and Education

The link between education and development is widely recognized. However, ideas of what development actually is and of education's role in developmental issues are quite varied and often contradictory. Development is a complex phenomenon which has the potential to reflect the best of human aspirations, but precisely for this reason it can often be subject to manipulation and can be utilized for purposes that contradict the initial motives of development (Peet & Hartwick 2009, pp. 3-4). Good intentions in development agenda can often lead to unintended, harmful consequences unless critically assessed in advance from the viewpoint of those being affected by it.

Escobar (in Rahnema & Bawtree 1998) considers development as a discourse that is embedded in a social and artificial construct called underdevelopment. Therefore, it is important to meticulously examine development from different perspectives if the power of the development discourse is to be challenged. (p. 92) It is important to continuously redefine development and critically assess the whole development enterprise since

development is not a static end state, but something that should be defined time and again both globally and locally. As this study aims to provide an informed critique of the education policy of the WB especially in relation to development, we shall carefully examine diverse approaches to development. Critique is vital in all policy regarding development in order to resist the assumption that because things have been done a certain way they would automatically be the best and last word on development. By continuously reassessing the notion of development, new conceptions of development might emerge. In this chapter we shall examine different approaches to development and education.

Simply put, development is the notion of making a better life for everyone. However, the means to accomplishing this vary depending on the context and the conceptions of development. In our unequal world, development starts from the mission of ensuring basic needs such as health services, a shelter and sufficient food, as well as being treated with dignity and respect (Peet and Hartwick 2009, p. 1). Development as a term implies the idea that we are not quite there yet, and therefore should strive as a society to work towards that desirable future. The complexity of development is that different worldviews are intertwined and often contrasting in what society should strive for. More specific notions of development depart from material and cultural visions of different societies, and should therefore be defined increasingly locally. However, the discourse of development in politics often appears to move people towards an apparent shared goal. The development discourse is not merely words, but is used to promote and justify real interventions with real consequences (McEwan in Willis 2005, p. 32). While it is useful and interesting to analyze academic debates about development, it is essential to bear in mind the importance of how these debates link to actual policies affecting millions of people worldwide (Willis 2005, p. 32).

In this chapter we shall shortly discuss some of the prominent, contemporary theories of development in order to have a deeper understanding of contemporary development discourse and policy. The different notions of development are particularly important in educational field, as the notions of development largely shape educational reforms, and should therefore be reflected upon. Especially in the case of peripheral countries, educational reforms are generally created under the influence of often external, hegemonic discourses of development. As Brook Napier (in Baker & Weiseman 2005) reminds us, education policy requires special consideration of factors such as poverty, disadvantage, corruption, foreign debt and growing population as they are always interlinked in the

implementation of educational programs. Educational policies in peripheral countries are often discussed within the developmental discourse and often with broad ideas of development in mind. (pp. 61-62) As development and education are fundamentally interdependent, our analysis of theories of development shall always include a discussion of their relation to the educational dimension.

We have categorized different theories of development into five separate sections. However, we recognize the fact that they are often intertwined and is important to bear in mind that none of these ideas emerged in an intellectual vacuum. Acknowledging that the amount of development theories is much greater than presented in this chapter, we aim to provide a general overlook on the diversity of theories. For the purposes of this study, we found it helpful to categorize these theories according to their key ideas of development. We shall start by analyzing dominant theories of development that emphasize economic growth, continue with presenting theories that view development as modernization, as redistribution of power, as dependency, and finally, discuss development as freedom.

3.1.1 Development as Economic Growth

Development theories that view development primarily as an economic matter are predominant in contemporary development policy-making. These theories stress the role of the market in promoting economic progress that is often portrayed as parallel to development. All theories of development have significant economic dimensions and therefore, we need to understand the basics of economics to fully understand development. (Peet & Hartwick 2009, p. 25) However, the extent to which economical aspects of development are emphasized vary quite drastically between different theories of development. In this chapter, we shall present a brief overview on relatively recent theories of development that centrally focus on economic growth, see how they gained increasingly more ground, and outline some central aspects of these theories. These theories have their foundations in the so-called classical economics in the 18th and 19th century, but for the purposes of this research, our focus will be on more recent theories. We shall concentrate especially on neoliberalism as it has been referred to as the dominant driving force for globalization in both economic and sociopolitical domains (Harvey in Rexhepi & Torres

2011, p. 680), and as it has become central in contemporary development and educational policy worldwide (Sheppard et al. 2009, p. 96).

Theories of development economics that were different from neoclassical and Keynesian economics emerged largely in the 1950s. The difference between classic liberalism and contemporary neoliberalism is that whereas the former emphasized freedom from state intervention and not hindering private profit with legislation, neoliberalism demands a strong state to support its interests (Hill & Kumar 2009, p. 3). At first, development economics presumed that economic processes in the peripheral countries differed from the ones in the so-called core countries, but gradually mono-economics returned, though the distinct challenges of the peripheral countries were acknowledged. The U.S. President Harry Truman held a significant speech in 1949, which has even been said to have established the invention of development. Truman's speech put economic processes at the center of development, and called upon business, privatization, industrial activity, and labor. (Sheppard et al. 2009, pp. 68-69) Since economy-centered development policies were meant to cause a process of trickle-down to the poorest people on a national level, development benefits were also supposed to spread to different regions on a global scale (Willis 2011, p. 48).

Neoliberalism is commonly described as a policy-framework which favors the relatively deregulated operation of the markets. Initially, neoliberalism concentrated on liberalizing markets by reforming domestic and local conditions, but soon it became increasingly associated with globalization and international development policy. Whereas Keynesian economics emphasize the role of the state in ensuring social well-being, neoliberalism is more inclined to prefer a minimalist state where the role of the market in organizing economic activity is highlighted. The market in the neoliberal discourse is associated with economic efficiency, competition, and choice, and deregulation and privatization has become central to neoliberal policy. (Larner 2000, p. 5) However, while neoliberalism may argue for less government, it does not mean that there is less governance. On the one hand, neoliberalism problematizes the state and is concerned to specify its limits through the invocation of individual choice, however, it has created new forms of governance by encouraging institutions and individuals to conform to the norms of the market. (p. 12)

Theories of development that emphasize the role of economic growth over other dimensions of development often understand development as a linear, globally uniform,

stage-type process that is guided by the historical example of the rise of the West. In this view, the rest of the world must replicate the model of the West in order to succeed and is simply trying to “catch up”. (Peet & Hartwick p. 24) A good example of this unilinear view of development is Jeffrey Sachs’ best-selling book *The End of Poverty* (2005), where Sachs continuously talks about “the ladder of development”. This understanding of development and the reasons for inequality and poverty fail to address the complex power-relations of our globalized world, but rather encourages the “rich countries” to help the “poorest countries” by investing enough so that they can “get their foot on the ladder”. Economic growth, according to Sachs, tends to build on itself once we manage to get it started. (p. 73)

Neoliberalism has, according to Sheppard et al (2009), become the framework within which development and transforming the peripheral countries is mostly located. The neoliberal economic and educational policies have had devastating consequences for economic equality, the environment, and education, but due to a domination on the public discourse, the neoliberal elite proponents have largely succeeded in marginalizing alternative conceptions (Hursh & Henderson 2011; Hill & Kumar 2009). Societal progress and development is equated with economic growth, and having little government intervention in the regulations of the market is considered progressional (Sheppard et al. 2009, p. 96). According to the most recent report on global inequality by Oxfam (2016), the richest one percent of the world’s population own more than the rest of the world combined. Inequality of this magnitude is unprecedented, and while it is argued that extreme poverty has decreased, the division of wealth is becoming increasingly unequal. (p. 2) The elites in the peripheral countries largely embrace neoliberal policies as the road to development and progress. Many scholars, activists, and marginalized communities testifying the negative consequences of these policies have, however, opposed to them and created alternative analyses. These alternatives are often portrayed as anti-globalization and contrasting to modernity, though they generally only oppose neoliberal globalization in particular. (Sheppard et al. 2009, p. 96)

As Ball (1998) points out, global neoliberalism is perpetuating inequality, as not everyone has equal stakes to begin with. The structural inequalities globally appear to link closely to the emerging polarization within market-reformed education systems. (p. 120) Drawing direct causal relationships between education and economic growth can be dangerous as it ignores the complexities of education and development, as well as complexities in power-

relations. Although the developmentalist models of education comprise of many different elements, it is based on the economic traditions of human capital theory. The idea of a causal chain where education, poverty alleviation, and development are directly correlated is problematic in many ways. It ignores remarkable contextual differences and perpetuates a simplistic vision of education, resulting in the danger of error where universalizing generalizations are made. (Colclough 2012, pp. 136-137)

Neoliberal policies have not only become central in developmental issues, but also in the arena of education as it is commonly viewed as closely intertwined with development. During the past decades, cost-efficiency, competition, and market-mediated delivery mechanisms have gained increasingly more ground in education policy, and as Spring (in Khoja-Moolji 2015) puts it, we are faced with a phenomenon he calls “economization of education” (p. 1). Education is no longer simply modelled using the methods and values of capital, but education itself is increasingly often drawn into the commodity form (Ball 1998, p. 126). The trend of reducing social processes and individuals to economic logics and measurable metrics are a part of the broader framework of neoliberalism (Khoja-Moolji 2015, p. 1).

It is important to bear in mind that it is not legitimate to claim that there is only one set of ideas, largely the neoliberal framework, that constructs educational reforms. Nevertheless, it would make equally little sense to ignore the links and common influences in educational reforms that are indeed identifiable in contemporary education policy. (Ball 1998, p. 122) Carter & O’Neill (1995) distinguished five elements of the neoliberal effects on educational policy, which were articulated as follows:

1. Improving national economics by tightening the connections between schooling, employment, productivity and trade
2. Enhancing student outcomes in employment-related skills and competencies
3. Attaining more direct control over curriculum content and assessment
4. Reducing the costs to government of education
5. Increasing community input to education by more direct involvement in school decision making and pressure of market choice. (p. 9)

Drawing from these viewpoints of Carter & O’Neill, we shall in this chapter elaborate some elements that are identifiable with neoliberal educational policy from a more contemporary perspective.

One fundamental characteristic of neoliberal policy is that government intervention is maintained to the minimum: the plurality of the market goes hand in hand with individual's freedom of choice (Trowler, 2003, p. 106). Under this argument, neoliberal policies depart from the assumption that the state has failed to provide its citizens with the resources needed for quality education, having underqualified teachers, materials, and lack of options. However, Ball (2012) argues that this idea of little state intervention in education is a fundamental paradox. While neoliberalism is founded in the idea of releasing economic activity from state regulation, education policy relies on the interdependence of the market and the state. It does so by setting the limits of the market in policy while creating the conditions in which the market can flourish and expand (p. 17). As a result, governance in education is no longer made directly and purely by the state, as the market first sets the targets and goals that are later encoded by the state (Ball in Singh 2014, p. 3). The aim is to reduce government spending on education while simultaneously attaining more control over curriculum, content, and assessment – all of which demand a strong state intervention in education policy. Therefore, the idea of little state intervention is an illusion, as neoliberal educational policy demands a strong state that responds to the needs of the market.

Starting from the assumption that the key to happiness is the individual's pursuit of their own interests, neoliberalism highlights freedom of choice as an elemental factor of the structures of the society – a view that causes an enterprise approach to education, too. As such, education is perceived to be a good or a service to be invested in. Schools are expected to compete against each other in national and international levels, arguing that competition is the catalyst of quality. Diversity within the education system is encouraged to some extent in order to provide extensive *freedom of choice* for the parents, who under this view are understood as consumers. School fees are thought of as an investment for the future, and knowledge is situated as a profitable good, a commodity to be purchased and accumulated like any other. (Trowler 2003, pp. 106-107) Additionally, educational systems have strongly been evaluated according to an outcome-based examination, measuring student achievement through standardized testing in specific academic subjects such as mathematics, sciences, language skills and social studies. (Baker & Wiseman 2005, p. 2)

The discourse of performativity is indeed a key concept in understanding the neoliberal effects on educational policy. It is highly individualized, stressing the need of conformity and productivity in order to succeed in the world. It invites to be more effective, to work

on ourselves to improve ourselves, and to feel guilty or inadequate if we do not. (Ball 2012, p. 31) Hence, education under a neoliberal ideology emphasizes the competences of the individual. Entrepreneurial education has gained weight in national core curricula, preparing the citizens for a competitive market-based global economy. Performativity has transformed into the widely used concept of *employability*. This notion implies that the employment of individuals and their capacity to maintain it depends heavily on their own capability of acquiring knowledge and skills. At the same time, it draws largely on the idea that it is on the hands of people to become employed by meeting the needs of the market, as national governments no longer guarantee employment in an increasingly competitive global environment. (Brown et al. 2003, p. 107)

The discourse of employability resembles that of human capital, with its expectations on individuals to invest in their skills and knowledge. The notion of human capital was first introduced by Jacob Mincer in 1958, and was formalized in the 60s by Theodore Schultz and Gary Becker, who created the correlation between investment in people and in machines. Research on the relationship between education and economic growth boomed during the following decades, which resulted in a growing consensus on the need for investment in education to achieve development. (Colclough 2012, pp. 135-136) As Bing (in Harber 2004) argues, education imparts skills and knowledge, consequently increasing productivity and yielding economic returns to individuals (p. 54). At the core of this notion is the presupposition that the more schooled an individual is, the higher the earnings and the returns, assuming that what has been invested in schooling will be regained on the long-term.

The idea of human capital has more recently also evoked the idea of *lifelong learning* to ensure the ongoing, constant formation of learners/workers in a knowledge-driven economy, updating and acquiring new skills and knowledge – something that “adds value” to their human capital. Additionally, as the global economy eases the international mobility and employment of those with high human capital, income inequalities and unemployment become more pronounced, as Reich points out (in Brown et al. 2003, p. 114). One of the problems with the discourse of employability is that there is an assumption that there is employment on the first place. Rhetorically, the concept puts full responsibility on the individual, suggesting that he or she should be able to gain initial employment, maintain it, and obtain new employment if required, but this understanding overtly ignores the fact that

it is the labor market who determines employability, and not the capabilities of the individual who do so (Brown et al. 2003, p. 110).

Under the argument of assuring more justice and equal opportunities, neoliberal policy-makers have adopted the term of “philanthropic capitalism” or “new philanthropy”. New philanthropists expect to see a return of their donations in measurable and quantifiable outcomes. This way, a business-kind model is integrated into social and educational issues. Ball (2012) argues that this new kind of model, also called philanthrocapitalism, is founded by three working principles: “bringing non-profits to scale”; emphasizing evaluation and performance management; and closing investor-investee relations on the basis of consultative engagement. The solutions suggested by this approach are called “silver bullet solutions” whose components are that they tend to be technical (based on the application of a single, new technology); generic (universally applicable); and scalable (from local to national and international). (Ball 2012, pp. 70-71)

Neoliberal development policy highlights individual freedom in the marketplace and holds individuals responsible for their personal well-being and actions. This perception of freedom of the individual and freedom of the market is extended into spheres that have major social implications to them, such as welfare, education, and health care. (Harvey 2007, p. 65) However, as Bernard Charlot asserts in the World Education Forum (2001), these decisive social spheres, such as education, must be egalitarian, democratic, and fair, and cannot be treated as mere commodities in the market. The neoliberal economist view of education has caused a dilemma in many countries of choosing between paying their external debts to supranational financial organizations or providing education for their citizens. The reduction of education to a commodity is a threat to humankind in its cultural diversity and the victims of this situation are primarily those in most need – for instance poor people, immigrants, indigenous communities, and ethnic, religious, and cultural minorities. (Charlot & Bélanger in Fisher et al. 2003, pp. 203-204)

The fundamental contradiction in neoliberalism is its paradox of the supposedly non-interventionist state. There is a contradiction between the ideal of minimal state authority and the need for a strong state in order to intervene when faced with, for instance, social movements that seek collective interventions for social welfare. (Harvey 2007, p. 69) The perception of the markets “harmonizing” social relations and tackling inequality has been contradicted by centuries of conflict and struggle, and as Peet & Hartwick (2009) claim,

the history of market driven societies is not a history of harmony, but a history of violence (p. 100). As Wade Davis asserts, there have been too many cases in history where overt acts of violations of human rights, dislocation of peoples have been motivated by economic and political interests of elites of adjusted power structures (Davis in Grossan et al. 2010). The assumption that privatization, markets, and the right prices will solve complex, societal problems is built on simplifying the nature of social problems and on neglecting the complexity of power-relations (Peet & Hartwick 2009, pp. 100-101). Neoliberalism assumes a level playing field for competition for all individuals acting in the market, which seems either innocently utopian or a deliberate confusion of socio-economic mechanisms. This assumption tends to increase rather than diminish asymmetry in power-relations over time and continues to cause increased concentration of wealth. (Harvey 2007, p. 68) Many theories of development have responded to the inadequacy of the focus on mere economic growth, one of which is a sociological approach deriving from similar philosophical foundations as neoliberalism. We shall now present some of these theories that consider development as modernization.

3.1.2 Development as Modernization

The theories covered in this chapter derive from sociological and philosophical disciplines, and focus less on economics than the previously discussed theories. Their foundations lie in the philosophy of Enlightenment, and on the subsequent ideas of naturalism and rationalism. The coalescence of naturalism and rationalism into a powerful theory of social structure and development was, according to Peet & Hartwick (2009), decisive in the history of the West, and has major implications for development theories of today (p. 107). In this chapter we shall focus on more recent theories of development that view development as modernization. The key tenet of these theories is the assumption that firstly, all nations can be located on a spectrum ranging from “traditional” societies to “modern” societies, and secondly, that nations are able and willing to proceed from the former to the latter group by replicating the models of “modern” societies (Sheppard et al. 2009, p. 70). Most conventional development theories are guided by this sociological theory of modernization and especially by the idea that progress and development means imitating the experience of the core countries. Although the modernization theories view

development as a wider issue than mere economic growth, they occupy the same linear view of development as neoliberal economic policy. In a sense the sociological theory of modernization is the foundation for most conventional theories of development, including the afore introduced contemporary theory of neoliberalism. (Peet & Hartwick 2009, p. 131)

The belief of modernization as an undeniable device of development gained ground in the 1940s and 1950s as industrialization and urbanization were perceived to be the inevitable foundations of a modern society. Under this light, material progress was understood as the necessary condition for social, cultural and political aspects to prosperity as well. Capital investment was therefore encouraged, which fostered the idea that if poor countries were to prosper, they needed large amounts of capital invested in their infrastructure and industrialization. This generated increasing dependency between the peripheral countries in need of foreign aid towards foreign investors. (Escobar in Rahnema & Bawtree 1998, p. 86) In its focus on capital investment, modernization theories share many commonalities with theories of development emphasizing economic growth. Also, the modernization theories' understanding of development as a stage-type process leading from uniform traditionalism towards a shared, singular future (Peet & Hartwick 2009, p. 139) is similar to economist theories of development.

Flows of international aid to the periphery were an essential element of development policy in the post-war period when modernization theories gained popularity. The predominant view was that the poorer countries were behind in the linear path of development, and thus large transfers of money, expertise and technology were predicted to contribute to the development process and narrow the gaps of inequality. (Willis 2011, p. 49-50) During this time some of the world's biggest international monetary organizations such as the World Bank and the International Monetary Fund were created to be part of the aforementioned development and aid enterprise. (Escobar in Rahnema & Bawtree 1998, p. 86).

The emergence of such organizations and the international pressure to industrialize nations that were perceived as backwards created a space for principles of authority between the dominant and the peripheral countries. Lending organizations (the WB and the IMF) became symbols of capital and power, while the United Nations carried the moral, professional and legal authority (Escobar in Rahnema & Bawtree 1998, p. 87). By establishing these structures of power, the leadership of dominating countries and

organizations, their knowledge and their strategy remained not only unquestioned, but also desirable. Many aid programs, such as “rescue packages” and the Structural Adjustment Programs (SAPs) applied since the late 1970s, attach conditions to the provided loans, an aspect called aid conditionality (Willis 2005, p. 63). However, during the 1970s and 1980s national governments became increasingly unable to pay for the interests of their debts provided by both commercial banks and multilateral organizations (p. 57).

The biggest omission by the modernization approach towards development was the exclusion of an aspect that it was supposed to be benefiting: people. As Escobar (in Rahnema & Bawtree 1998) states, individuals were not understood as dynamic, integral beings existing within their cultural spheres, but rather as “statistical figures that could be moved up and down in the charts of ‘progress’”. Development was thus conceived as a vertical process that is a rather top-down, ethnocentric and technocratic approach, consisting of universally applicable technical interventions which provided “target populations” with “badly needed goods”. Such was the need to adapt societies of the then called third world into the industrialized model, that instead of opting for change as a socio-historical-bound transformation, external measurable and technological strategies were introduced in the name of progress and reason. So strong was the discourse of modernity and development, that affected nations started to see themselves, too, as backward and inferior, pledging allegiance to the promises of progress. Language also played a central part in the classification of the world. The newly inserted concept of third world in sociology brought along a discursive homogenization of the idea of underdeveloped with representations of illiteracy, poverty, hunger, and so on. (pp. 91-93) By claiming that the way out of this crisis is inevitably that of modernization, this discourse of development justified itself as the hegemonic worldview.

With the emergence of modernization theories in development policy, a strong trend of isomorphism arrived in educational policy and practice. This trend encourages the adoption of relatively similar models for local schooling worldwide, regardless of the considerable variations in environments of schooling at regional or local levels. Modernization theories have largely contributed to the creation of internationalized education policy that is more oriented towards broad, international concerns than specific problems or regions, although elements of each nation, region, or culture influence local level schooling to a largely varying extent. (Baker & Weiseman 2005, p. 7) Educational discourse is always profoundly ideological and determined by time and space as education encapsulated values

and codes of what is worthy of passing on to future generations in a society. However, there are frequent claims of some universal truths about education especially in internationalized education policy which has its roots in the European Enlightenment. (Tate 2013, p. 253-254)

The notion of a unified Enlightenment project is arguably artificial due to the amount of diversity between different projects and thinkers in the era of Enlightenment. However, the influence of the ideas that emerged during that era has been profound, and therefore, in order to understand their legacy today, it is useful to look at some common aspects of these ideas. Drawing on Tate's (2013) views on international education and the Enlightenment project, these features include an emphasis on reason, a belief in progressivity in the development of humanity, and embracing universalism, egalitarianism, and individualism. (p. 258) These ideas have resulted in globalization of knowledge and in a linear understanding of development often neglecting relevant issues for local communities. The existence of some global knowledge is often taken for granted, generally referred to as universal knowledge that is available to all and not owned by anyone. (Smith 1999, p. 63)

However, it is important to bear in mind that all knowledge is local in the sense that it is human-centered and driven by human interests (Masolo 2003, p. 21). Neglecting this locality in education policy is maintaining the legacy of Enlightenment's ideas, and according to Walsh (2007), the ideas of universality are maintained in both basic and higher education institutions alike by producing the euro-american knowledge as "science" and universal knowledge, whereas other ways of knowing are labeled as local knowledge and as inferior (p. 28). Worldviews are central in perceiving knowledge, and though worldviews are developed locally through socialization and interaction throughout a person's lifetime, they are often taken for granted and left unchallenged (Hart 2010, p. 2).

In addition to the importance of understanding the legacy of the Enlightenment project, it is also helpful to briefly look at the colonial discourse of primitivism and civilization in order to understand its legacy in contemporary societies and its role in shaping the theory of modernization. The concept of primitivism was used to justify the suppression and domination of native peoples of sub-Saharan Africa, of the Americas, and of the South Pacific. The idea of primitivism allowed Europeans to construct a sense of cultural superiority, and thus colonialism was considered a cultural rescue mission in addition to its economic interests. Due to this sense of superiority that derives from the philosophy of the

Enlightenment, there was no need for debate over educational policies, but instead, the colonial educational model was imposed on the colonized nations. (Spring 1998, p. 18) “Discoveries” regarding the so-called new world challenged and expanded ideas Europe held about itself, and the production of knowledge became a commodity that was possible to exploit similar to other natural resources during colonialism (Smith 1999, p. 59). During colonialism, the colonized cultures, peoples, and their nation states were situated as outsiders in order to justify the imposition of colonial rule, and so-called “civilization” was located in the core countries (Smith 1999, p. 63-64). The narrative of civilization, a discursive strategy of cultural imperialism, gradually emerged as a result (Coulby & Zambeta 2005, p. 194), and as Smith (1999) argues, this legacy of colonialism continues to exist in the unequal power-relations of our contemporary societies (p. 24). As Zapata Olivella (in Walsh 2007) puts it, the chains of colonialism are no longer on the feet, but rather in the minds of people (p. 27). This is what wa Thiong’o calls *the colonization of the mind* (in Smith 1999, p. 59), and it continues to be maintained and reproduced by educational institutions worldwide by presenting science and epistemology as singular, objective, and neutral. In educational research, the dominant paradigm has often concentrated on a single educational tradition with the expense of neglecting diversity.

There is a tendency to draw simplified equations with education and formal schooling, and to concentrate on the role of literacy and literary traditions. Consequently, many interesting and important educational traditions have often been ignored in the study of educational philosophy and history. (Reagan, 2005, p. 6) The illiterate of the world who traditionally have emphasized the oral tradition are often portrayed as ignorant, and implying that what is not written is irrelevant, thoughtless, weakness, and primitivism (Hountondji in Odora-Hoppers 2002, p. 9). The need for diversity in educational debate is maintained by many anthropologists, as educational institutions are constructed on particular, presumably local sets of ideas of what is reasonable, right, and meaningful, what is worth knowing and what is not (Stambach & Ngwane in Levinson & Pollock 2011, p. 306). This idea contrasts with the modernization theorists’ emphasis on universal education and global knowledge in seeking development.

The modernization theories of development reduced and continue to reduce development to a spatial expansion of innovation from the perceived dominant countries to the periphery. Peet & Hartwick (2009) suggest, that the modernization theories were a response to the threat of socialism. They implied defining development as the adoption of

the mental models, institutions, goals, and culture of the core countries, which created the sociocultural foundation for neoliberalism. (p. 132) During and after the Cold War, modernization theorists located the notion of development in the so-called third world, and the model for development was a simple replication of the models of the industrialized countries. This resulted in the linear view of development as a transition from a traditional to a modern society. (Pérez 2009, p. 43) The policy resulting from these ideas was that societies wishing to develop must decide to open their borders for progress and development and become part of the global capitalist system. To climb the ladder of development, societies should welcome multinational corporations, technology, and be export-oriented, while diminishing state intervention and increasing privatization.

These ideas demonstrate the interconnectedness of modernization theories and neoliberalism; modernization theories indeed paved the way for neoliberal economics, forming a more general theory within which the economic model was possible to be located. (Peet & Hartwick 2009, p. 140) As we have now shortly discussed both modernization theories and neoliberalism, we shall now continue with some alternative theories of development sometimes called critical theories. First, we shall present some key ideas of theories that view development as redistribution of wealth – theories, that modernization theories often opposed to – after which we shall move on to theories critical of the development enterprise altogether, theories that associate development with underdevelopment. Finally, we shall discuss aspects of development as freedom, a concluding chapter named after Amartya Sen's book (1999).

3.1.3 Development as Redistribution of Power

The role of the state in issues to do with development is crucial. However, the amount of preferred state intervention in national and international development varies widely between different theories of development. As pointed out in the previous chapters, even the apparently non-interventionist states provide systems of regulation to enhance the efficiency of the market. In this chapter, we shall present theories of development that encourage much greater state involvement than mere control over the market; theories that do not emphasize growth but rather aim at redistribution of the existing wealth, drawing attention to the fact that wealth and power is divided unequally in our societies. According

to Peet & Hartwick (2009), the emphasis on economic growth has not provided solutions to the ever-increasing inequalities globally, and hence these theories can be seen as a counter-reaction to development theories focusing excessively on the role of the economy. Marxist and neo-Marxist theories that shall be examined in this chapter address many tensions, such as tensions between structure and agency, between structural imperatives imposed by societies and peoples' struggles to change the prevailing conditions, and between the unfolding of a world system and people's actions in creating history. Different responses to these tensions create a great diversity in schools of Marxist and neo-Marxist thought. (p. 175)

Advances in technology, science, and industry were some of the pillars that gave rise to the modernization theory throughout the nineteenth century. As mentioned before, modernists saw this trend as a promise of a civilized, efficient and productive world. Alongside with modernist philosophers, Karl Marx and Friedrich Engels perceived technological advances, science and industrial production as emancipatory tools for humankind. However, their theory of thought differed vastly from that of traditional modernists by stating that the control and the benefits of the means of production should be under collective power, rather than in the hands of a few. Marx and Engels stood for the development of material production in the sense that it would be a liberating tool for humankind and the environment by making life easier, better and longer – the ultimate goal for happiness. Hence, modernity was understood as a step towards liberation through material progress. The problem was that the movement of modernization was orchestrated and controlled only by a few: the capitalist class. Understanding this distribution of power as unequal, the aim of their school of thought was to change society in order to direct modernization to benefit the meet the needs of the poor. (Peet and Hartwick 2009, p. 143)

Human nature was not seen as something innate, but rather perceived as a result of the surrounding material conditions and historical struggles. Instead, what was considered an inalienable aspect of humankind was human labor, an essential feature to make further life possible. As such, development was a result of the physical and mental forces of labor, such as material instruments and intentions, conceptions and plans. Through industrial development, time directed to work would gradually be shortened by increasing efficiency and productivity, gaining more time for recreation, conceptualization, science, and emancipating humans for a more liberated existence as a consequence. Marxism criticized the capitalistic notion of development, where the surplus labor of the working class is

extracted from them for mere competition among the profit-making capitalist class. (Peet and Hartwick 2009, pp. 146-148) Although Marxist theory in its original form is often disregarded as a theory of the past, it should not be overlooked as it created the broader framework for many contemporary critical theories and social movements that challenge the inequality in power-relations created and maintained by the capitalist economic system.

The theories of development presented so far in this study have been largely Eurocentric as they have all originated in Western Europe and spread globally from there. These theories have, however, been challenged by a wide range of theorists and academics worldwide, and Latin American scholars have been a significant source for this critique. Structuralist approach to explaining the nature of Latin American economies departed from Marxism in the mid-20th century, and academics such as Raúl Prebisch formulated new arguments for theories of development based on local experiences (Willis 2005, p. 74). Structuralism focused on the internal relations of Latin American countries and argued that their economies function differently to the ones of the US and Western Europe. Therefore, structuralists saw the need for a new theory and policy approach to understanding and developing local economies. (Bracarense 2012, p. 377)

During and after the Cold War, also other Marxist theories of development were reformed from the focus on class struggles to increasingly more emphasis on global inequalities. The idea of domination and subordination draws largely on Marxist theory, and the core-periphery models that resonate with the Marxist principle of exploitation of labor under capitalism suggest that development is dependent on a region's economic power within the unequal economic system. The core-periphery model has been applied to analyze dependency and inequality on both local and global scale. (Sokol 2011, p. 90) Wallerstein, however, was keen to move beyond the dualism of viewing the world as the core and periphery. He stressed the interdependence within the world system, and within the world system, he distinguished three main economic zones. Wallerstein called these zones the core, semi-periphery, and the periphery, emphasizing how these categories are not fixed, but countries would be able to move in and out depending on their economic situation. The inclusion of the semi-periphery was a reflection of the global changes in the 60s and 70s when the so-called newly industrialized countries emerged. From Wallerstein's thoughts emerged a school of thought called the world systems theory, which highlights the importance of considering national economic development in a global context. (Willis 2005, p. 80; Peet & Hartwick 2009, pp. 173-175)

Some scholars argue that class in the Marxist sense is dead, whereas others understand class as a fluid concept relevant also in contemporary societies. Hill et al. (in Hill & Kumar 2009) stress the class consciousness of the capitalist class who appear to be very conscious of their wealth and power, and call for restatement of the epistemic foundations of Marxism through a class-based ontology in order to be able to restructure societies with no in-built inequality. Class is not an abstract or an arbitrary concept for Marxists, but rather, somehow inbuilt in certain human processes, and it continues to be reconstructed in economic practices where interests of the ownership and means of production often collide. (pp. 104-105) Although class is not addressed in most contemporary narratives, class relations have not disappeared but rather reformed, and they continue to be present also in the realm of educational studies and in the marginalization in the academy (McLaren & Jaramillo 2010, p. 3). Some critics of Marxism argue that the theory overlooks aspects that go beyond class, such as gender, ethnicity or sexuality. Maria Ebert argues that we should not get distracted from the fact that all of these aspects result from the exploitative conditions that the capitalist system gave birth to (Ebert in McLaren and Jaramillo 2010, p. 3). Although class is often overlooked in contemporary studies, it is an ever-present aspect of our everyday lives that interplays in intersectional ways with our daily activities. As such, Ebert calls for embracing critical pedagogy in order to uncover the internalized structures that continue to maintain and recreate inequality in societies (p. 10).

Traditional Marxists were skeptical of the humanist belief in education and schooling as designed for the best interest of the child, but rather saw education as a part of the superstructure of the society, aiming at conditioning and institutionalizing children for the capitalist system (Hill et al. in Hill & Kumar 2009, p. 108). Possibly due to this mistrust in the education enterprise, Marx and Engels did not discuss education in much detail. Despite their little focus on educational issues, Marxist theory provides theoretical perspectives on contemporary societies that have been adopted in discussions regarding the social functions of education, and its concepts and methods have been of use both in theorizing and criticizing education and in providing alternative approaches to education. Contemporary critical theory and critical pedagogy draw largely on Marxist theory, as it emphasizes the importance of criticism towards ideology in education and locates education within the system of political economy and social relations. (Kellner in Gur'Zeev 2005, p. 52) Classical Marxists unveiled the naturalized yet illusory human relations

within the capitalist system, which contributed to the creation of a more active theory of knowledge and of critical pedagogy (McLaren & Jaramillo 2010, p. 6).

Despite Marx and Engels' little interest in education specifically, many Marxists such as Antonio Gramsci paid more attention to education and schooling from a Marxist perspective. Gramsci used the term *hegemonic* when discussing education and schooling, referring to the reinforcement of socio-economic control and reproduction of the status quo by the schooling system. (Harber 2014, p. 60) Resistance theorists and critical pedagogues such as Giroux, Freire, and McLaren departed from this skepticism, asserting the transformative power of education and the possibilities for challenging the capitalist system and hegemony within schools. (Hill et al. in Hill & Kumar 2009, p. 108) However, as education is understood as an ever-present aspect of daily life, critical pedagogy is not only reduced to classrooms. For instance, McLaren and Jaramillo (2010) draw on Ebert to call for the adoption of critical pedagogy as a social movement taking place in community settings in general (p.10).

Marxist perspectives on education gave birth to several projects departing from critical education in the core and peripheral countries. The most prominent feature of such an enterprise is the counter-hegemonic purpose of such an education. Unveiling imperialism, (neo-)colonialism, patriarchy, and other aspects conforming unequal power-relations, critical education became a source and a goal for a fairer society. Combined with the theology of liberation in Latin America, the sixties gave birth to a wave of endogenous radical education in several countries of the region, creating a space for terms such as interculturality, emancipation, decolonization, critical awareness and empowerment in education. (Aman & Ireland 2015, p. 2) Critical pedagogies of recuperation extended what first began with cultural recuperation to a broader movement of including the concept of recuperation into formal schooling. The concept of recuperation here means a direct and active movement to recreate the presence of the working class in the public sphere, and within this framework the space of school, similar to any public space, becomes a potential space for social change. A participatory pedagogical space directed at confronting the dilemmas inherent to the capitalist society could be created by bridging the practices of social movements with the norms of schooling. (Jaramillo et al. 2011, pp. 752-753) Considering education as a purposeful, socially constructed practice, critical educators highlight education as a political act. Unveiling the relationship between politics and

education, it could be said that the overall purpose of critical pedagogy is to challenge the established power dynamics that leave room for exploitation in power-relations.

According to McLaren, the focus of the educational left has nowadays often been distracted from the class struggles in our contemporary societies due to the invasion of capital in the public sphere. Capitalism is often portrayed as commonsense reality, and the term 'social class' is commonly replaced by the less contentious term socioeconomic status. Educators are increasingly often overlooked in educational issues as governments strive to ensure global competitiveness in making their educational policy. McLaren emphasizes how class struggle should not be considered an outdated issue, but rather sees it as central to transformative education. (McLaren in Gur-Ze'ev 2005, p. 74-76) Radical examination of ideologies and practices in education is at the core of educational theories founded on Marxist thought, and they recognize the need for both pedagogical and social transformation in order to resist consumer capitalism to enable the creation of a free and more democratic society (Kellner in Gur-Ze'ev 2005, p. 52).

Therefore, development within theories emphasizing redistribution of power represent social transformation that enables widespread freedom to the people. Development does not simply involve growth that shall eventually trickle down to all, but rather economic transformation that results in better living standards, access to public services, and in more equal income distribution. (Peet & Hartwick 2009, p. 196) This transformative aspect is crucial to education's role in development, and as society should be transformed, so should education. After the fall of the Soviet Union, development alternatives stemming from critical liberal dependency theory and socialist sources, notions of relative autonomy from the global system, using local productive resources to meet basic needs, the belief that the state should direct the economy toward developmental objectives — they were largely dropped from predominant development discourse as irrelevant. The intellectual groundwork for this transformation in economic policy was prepared by a barrage of criticisms aimed at Marxism, the leading alternative philosophy to neoliberal theory. (Peet & Hartwick 2009, p. 184) Marxist theories can, however, offer valuable insights to development outside of the neoliberal framework, albeit often providing a similar understanding of modernity. In the following chapters, we shall continue by looking at theories of development that emphasize locality and bottom-up rather than top-down approaches to development, leaving more space for diversity by placing themselves outside of conventional discourses of development.

3.1.4 Development as Dependency

A new discourse of development emerged as a counter-reaction to the models of development that encourage catching up with the West. Theories criticizing the development enterprise emerged in the end part of the 20th century, and while Marxism focused on explaining how the dominant classes in mainly dominant regions exploit and oppress, these theories seek to reveal inequality in power-relations worldwide (Knippers Black 1991, p. 26). Different experiences from development projects have brought about a certain revolution in development thinking with aims to re-evaluate what development actually means (Slater in Sheppard et al. 2009, p. 82). These theories are often called dependency, underdevelopment, anti-development or post-development theories. Here we shall mostly use the term dependency to refer to these theories.

The interconnectedness of the development of hegemonic countries and the underdevelopment of peripheral countries is central to these theories (Peet & Hartwick 2009, p. 166). Dependency theorists call for the creation of a new economic and social model that allocated laws of development within contextual and internal frames of those countries who have been affected by the aforementioned underdevelopment. By doing so, it rejects the discourse of underdevelopment as a result of slowness or backwardness of countries that fail to adopt the patterns of the hegemonic countries (Dos Santos 1970, p. 231). Instead of conceiving underdevelopment as a stage in the ladder of development, it is explained as a consequence of it (Galeano 2012, p. 341). In the same way, the development of the hegemonic countries is seen as a result of external destruction and conquest rather than internal innovation and superiority. Furthermore, as Harber (2014) argues, underdeveloped countries will never strictly be developed under the conventional view of development, as their dependent relationship to the ‘metropole’ is the primary cause of their poverty. It is the financial, organisational and technological supremacy of the hegemonic countries which makes them able to control the terms of trade. This relationship makes it possible to supranational corporations – primarily settled in the metropole – to buy primary goods at a cheap rate, while selling the manufactured products at prices that favour themselves. (p. 57)

Although it is crucial to emphasize how issues with inequality, domination, and environmental damage did not originate with development, a number of academics and social movements argue that increasing polarization in power-relations is enforced by the

development enterprise. Dependency theorists understand this polarization as insoluble within the models of mainstream development project, and drawing largely on Foucault's ideas of knowledge as power, they address the politics of representation on a global scale and challenge ways in which realities continue to be "colonized". (Sheppard et al. 2009, p. 104-105) Similarly, the notion of *failed development* takes a challenging stance towards the discourse of development by explicitly questioning the view that the development enterprise is altruistic and effective. It implies that development programs often exacerbate pre-existing inequalities, and that the benefit of these enterprises are not merely for the "receiver", since they are largely driven by external agenda. The view presupposes that development does not necessarily bring progress, but often catalyzes conflict. (Rappleye in Paulson 2011, p. 74)

While some consider development either as an outdated concept or a complete failure, many scholars have proposed radical reinterpretations of political and social reality and offered alternative conceptualizations for social change. For instance, Arturo Escobar forms his arguments for radically reconsidering development into three proposals. Firstly, criticizing the discourse and practice of development has come to its end, and has paved the way for more radical imaginations of alternative futures. Secondly, development is a strategy produced by the "first world" about the "underdevelopment" of the "third world", and it has been the primary means of imagining and representing the periphery, which has excluded and marginalized other ways of representation and practice. Finally, considering alternatives to development entails both a theoretical and practical transformation in notions of modernity, the economy, and of development, which, according to Escobar, could best be achieved by empowering local social movements. (Escobar in Edelman & Haugerud 2005, p. 341-342)

Similarly, Raúl Prebisch highlighted the interconnectedness of regional conditions and the international context, and his main preoccupation was to find alternative responses for Latin American countries to the challenges and opportunities posed by globalization. Similarly, Raúl Prebisch left three main messages as his legacy to dependency theory. He firstly emphasized the need to challenge the centralized vision of development, as visions of the world order created by the core countries are often formulated to serve their own interests. Secondly, Prebisch underlines the need for analysis and creation of a realistic vision of existing challenges so that reality could be transformed, and the global order could be freed from subordinate power-relations. The third message of Prebisch is similar

to Escobar's, with the need for profound change in the structures of the society in order to create a diverse social structure less exposed to exploitation. With a diverse societal structure, it is possible to contribute to wellbeing, social inclusion and to non-subordinate international relations. (Ferrer 2010, pp. 8-9) Both Escobar and Prebisch, as many other dependency theorists, understand locality and social movements as essential to the establishment of alternative views on economy, society, and democracy.

The beginning of the so-called era of development is often traced to Truman's speech in 1949, but as Esteva (in Allen & Thomas 2000) points out, the concept of development was not new as such. The new idea was that development became defined in terms of escaping underdevelopment, in which two-thirds of the world were located, and therefore the underdeveloped regions had to look outside for their own cultures for development. (p. 5) According to many dependency theorists, this perception of development constructs the periphery, and with the development discourse communities are seen as "underdeveloped" and treated accordingly. (Escobar in Edelman & Haugerud 2005, p. 342) This hegemonic discourse of development shares features with other colonizing discourses, and for instance Gayatri Spivak sees development as new form of imperialism, with the core countries responsible for the salvation of the periphery (Spivak 1999, p. 371). Tikly (in Harber 2014) argues that a key aspect of this imperialism is the way in which the economic discourses of the metropole put special emphasis in primary education in developing countries, and particularly in human capital theory through various supranational institutions. Additionally, this emphasis on investing in a certain type of primary education in developing countries is also accompanied by the imposition of Western teaching materials and resources as a consequence, reinforcing eurocentric worldviews in schooling. (pp. 57-59)

Dependency theorists challenge the meritocratic view of schooling that human capital advocates stand for. Instead of viewing education as an essential mechanism in tackling inequality, dependency theory sees it as a device of socio-economic reproduction. The origins of this theory have its roots in marxism and neo-marxism, arguing that the higher and middle classes do not only control the proletariat through means of production, but also through institutions capable of transmitting ideologies and teaching individuals their particular places in society. (Harber 2014, p. 59) Similarly, Foucault explains schools as indoctrinating institutions where the hegemonic discourse is transmitted to maintain control and avoid a chaos in the system (Foucault 1995, pp. 176-177). Discourse for him is

what delimits the boundaries of what is to be silenced, excluded, and desired, giving way to what is considered to be true (Foucault in Young 1981, pp. 52-53). Some social realists have maintained that the way knowledge is structured in educational institutions is intimately related to the principles of social and cultural control in societies. Despite the importance of this critical analysis by social realists, they have also been accused of being insufficient, merely descriptive, and neglective of the ways in which power mechanisms were first created. (Apple, 1990, p. 2)

Educational reforms in the periphery have often proved problematic as the implementation issues related to realities and needs of the communities are often complicated by issues with poverty, disadvantage, corruption, foreign debt, and rapidly growing populations, to name a few. Furthermore, the source of the reform needs to be evaluated as they are often imported or imposed by the core countries, and are therefore not necessarily responsive of local needs. As a vast majority of the peripheral countries had centralized educational systems imposed by colonial powers, and as many of these centralized structures have been preserved after gaining independence, it is important to analyze the specific features of educational development reforms and the ways in which the reform policies are implemented in a largely top-down manner. (Brook Napier in Baker & Weiseman 2005, pp. 62-63)

As dependency theories emphasize the need for locally guided transformation in all spheres of the society, it seems contradictory to draw generalizations of their educational policy. Education should be radically transformed to benefit all people regardless of their position in the local or global order. Social movements are seen as central to the societal reforms including education and schooling, and development projects should be designed with a bottom-up rather than a top-down approach. Alternatives to development can be found in innovative grassroots movements and experiments, and many scholars share an interest in local autonomy, culture and knowledge, defending localized, pluralistic grassroots movements (Escobar in Edelman & Haugerud 2005, p. 343). The importance of challenging the hegemonic development discourse is an essential part of dependency theories in framing educational policy and all social change. Dependency theories have been a form of resistance to predominant approaches with its criticism towards the historically loaded conception of development. However, in our view it is not necessary to completely abandon the notion of development, but instead, it is possible to radically

reform the concept through critical analysis. In our next section, we shall examine theories departing from alternative views of what development could be.

3.1.5 Development as Freedom

Here we shall look at theories that widely understand development as freedom. This might sound rather utopian and idealistic at first, but we wish to elaborate on some alternative approaches to development. These perspectives understand development as an expansion of liberties that are valued by individuals and as an increase in human capacities that are beneficial and satisfactory for the people affected. The idea of development as freedom presented here will be largely based on Amartya Sen's view of development that does not ignore the important economic aspects of development, but rather expands it to include dimensions of human rights, democracy in political systems, human well-being, and strengthening liberties and agency of individuals and communities (Pérez 2009, pp. 101-102). Sen (1999) sees freedom as the principal means and ends of development. Freedom here is understood as the absolute liberty of self-agency where political, social, and economic facilities are interconnected in enabling individuals and communities to shape their own destiny free of any constraints. (pp. 9-10) Although Sen acknowledges that income can indeed be very important in order to expand the freedoms of members of society, he argues that these freedoms in fact depend largely on the interconnections between a variety of conditions, such as social and economic arrangements, good health and education, and the liberty to exercise political and civil rights, as well as in participating in the making of the public decisions that affect progress (pp. 3-5).

The Human Development Report 2015 emphasizes that “the true aim of development is not only to boost incomes, but also to maximize human choices—by enhancing human rights, freedoms, capabilities and opportunities and by enabling people to lead long, healthy and creative lives” (UNDP 2015, p. 1). The predominant market-oriented economic system often implies that the opportunities to access the “free” market are equal, but as Sen (1999) puts it, “economic unfreedom can breed social unfreedom, just as social or political unfreedom can foster economic unfreedom” (p. 8). Thus, the freedom to participate in the labor market is constrained by a variety of other freedoms – or lack of them. It is not uncommon to find a discourse in economics which assumes that individuals

have the opportunity to freely shape their lives according to their interests, without being shaped by social arrangements and cultural practices (Kiron in Ackerman et al. 1997, p. 203). The access to certain segments of the labor market is, however, very limited, consequently keeping people in bondage and captivity (Sen 1999, p. 11). Sen's view of freedom rejects the notion of poverty as a social condition or as a mere lowness of incomes, but rather sees poverty as the deprivation of basic capabilities and as the result of systematic obstacles towards freedom (p. 87).

A critical democratic understanding of development also stresses the need to transform the very notions of development to achieve conditions for democracy, again perceived as the collective freedom to make decisions that determine social and individual existence. Transformation can be made possible with constructive criticism that exposes what most need to change in the society, which according to Peet & Hartwick (2009) is the inequality in the existing global society. Development in this view is equality, and only equality can enable the occurrence of democracy. (p. 282) Makuwira (2006) criticizes the way democracy has been understood in the West, and more so the way representative democracy has been implemented in many developing countries. This misconception of democracy as equated with freedom is often understood as the liberty of an individual to act in the way they want regardless of the consequences towards others, and links this misconception to the failure of development itself. In democracies that are characterized by perpetual violence, corruption and insecurities, it cannot be claimed that freedom exists – and, hence, neither does development. The freedom of some (to exploit, to commit crimes, to impose fear) is the unfreedom of others. (pp. 196-197) Development should be redefined as a universal liberating activity; a challenging project requiring ethical respect, intellectual creativity, political support, and practical activism (Peet & Hartwick 2009, p. 293).

Due to increasing globalization, alternative theories of development have put emphasis on local environments, since they are where global processes are materialized in dialectic relations through opportunities, synergy, advantages and disadvantages. Therefore, local environments can provide alternative approaches to global capitalism. (Pérez 2009, p. 111) Locality and democratization of knowledge is, according to Vandana Shiva (1993), an essential precondition for human liberation. With democratizing knowledge, she refers to redefinition of knowledge so that the local and diverse would become legitimate knowledge. All knowledge is a particular cultural system, but hegemonic knowledge has

predominantly been projected beyond culture and politics in our contemporary world, and its relationship with the development enterprise has invisibly become the legitimizer of homogenization of our culturally and environmentally rich world. The development paradigm is rooted in the idea of globalizing knowledge, and the power by which the dominant knowledge system has repressed other ways of knowing makes it undemocratic and exclusive. Universalization of knowledge is an abstraction that violates the concrete realities of people, which is why emphasizing local knowledge is essential to reaching human freedom. (pp. 60-62)

Alternative views of development should not be treated nor perceived as an ends to the journey towards change, but rather as a departure point. Scholars such as Sen, Rahnema, and Escobar, have stressed the importance of acknowledging the agency of individuals, instead of seeing them as subjects of technocratic developmental experiments. Diversity is often artificially celebrated, but cultural pluralism has often been misunderstood as co-existence of static cultures, which has denied dialogue between peoples and created a scattered view of cultural entities. This false pluralism has limited the local communities' potential of transformation and neglecting opportunities for mutual dialogue. (Cerdeja García 2007, p. 125) Challenging the binary, top-down models is necessary in creating spaces for new discussions where people's freedom is at the center. These spaces should not only enable participation in decision-making, but also encourage participation in the implementation and improvement of the development agenda. Locality, bottom-up approaches, and the aim of expanding liberties are also the core of democratic educational practices.

Theories of development that emphasize freedom value the transformative power of education. The need to democratize knowledge is tightly linked with education, and as Apple (1990) reminds us, knowledge *is* power, but for the time being primarily in the hands of those who already possess power, who control cultural capital and economic capital alike (p. 154). This distortion of power can be challenged with education, and specifically with education that is transformative, critical, and contextually defined. Alongside Amartya Sen's view of unfreedom, Brazilian pedagogue Paulo Freire views poverty, exploitation, injustice, violence, and alienation of all kinds as an act of dehumanization of both the oppressed and the oppressors. His philosophy calls for critically examining oppression to gain full consciousness through dialogue – an act that shall be done through a pedagogy of the oppressed. The humanity, the *unfreedom* of both parts will

be recovered only then. (Freire in Harber 2014, p. 90) The main motive of this pedagogy – a pedagogy that can and should be extended to all social realms – is the transformation of the world towards one where dignity is not conditioned nor constrained. To change the world, we have to know the world. Similarly, from a social constructivist perspective, Rahnema (in Rahnema & Bawtree 1997) argues that the first condition to overcome injustice is to confront things as they are rather than to see them as we want them to be (p. 392). Criticality and locality are central to transformative educational practices, and pedagogy must always be contextually defined in order to respond to the challenges that arise in various settings where education takes place (Giroux 2001, p. 18).

Human rights are often referred to as the foundation for imagining development, and within the rights-based approach, education is given intrinsic value instead of the economic utilitarian perspective. Beyond the right to education, the rights-based approach also seeks to secure children's rights in general and utilize education to achieve the ensurance of other fundamental rights. (Barrett 2011, pp. 123-124) The fundamental principle stated in the World Education Forum affirmed public education as an inalienable right that should be guaranteed for everyone and paid by the state. Education must be radically democratic, egalitarian, and fair, and it must not be treated as a commodity. (Charlot in Fisher et al. 2003, p. 203) These arguments can be justified with both the Universal Declaration of Human Rights and the United Nations Convention on the Rights of the Child, which refer to education as a human right, with emphasis on how all organizations concerned with children should work towards what is best for each child, without distinction of any kind. They also specify that education should develop each child's personality and talents to the full and should encourage children to respect their parents, culture, and other cultures, and cultural rights are expressed as indispensable for human dignity and free development of personality. (See U.N Declaration of Human Rights 1948, art. 22, 26, 27; U.N. Convention on The Rights of the Child 1989, art. 2, 3, 29, 30)

However, in recent years, many ordinary people and radical thinkers have been challenging the nature and universality of human rights. The Universal Declaration was created in a particular cultural context, which is why their universality should be critically examined. The rights have an individualist foundation causing dissolution of cultures based on notions of communal obligations, service, and commitment. As we can never truly know more than a small part of our globe, “global thinking” can be, according to Esteva & Prakash (in Rahnema & Bawtree 1997), a mere illusion at its best, and at its worst it can

perpetuate destructive and dangerous actions by global “think-tanks”. (pp. 279-284) The commonalities of the critique towards universal human rights is the recognition and rejection of the fact that rights, as culturally specific artifacts, are presented as universal, fixed, and shared sets of values. (Pagden 2003, p. 172) The ways in which human rights have been interpreted in relation to education, for instance, have often been narrow and culturally insensitive, equating education with schooling and hence disregarding diverse ways of organizing education so that they could indeed contribute to developing each child’s personality and talents to the full. Although the message of human rights is not necessarily rejected within many of these alternative theories of development, they emphasize the need to challenge universality even in areas often taken for granted.

Paulo Freire has created a *Pedagogy of Freedom* (1998) that values the students’ knowledge, emphasizes the need to be critical, and sees education as a form of intervention in the world. As Duarte (in Gur-Ze’ev 2005) aptly puts it, “the essence of Learning is Freedom” (p. 328). Schools should not only respect the kinds of knowledge that is socially constructed in the communitarian praxis, but also value the knowledge of students and discuss the logic of the dominant knowledge in relation to their contents (Freire 1998, p. 36). Freedom will be holistically embraced in education by approaching it through all the different modes in which education takes part: formal, informal, and non-formal education settings should advocate for this goal. Pedagogical conditions should always consider the context in which knowledge is produced, as they exist to connect the lived experiences, histories, and cultures of the students with forms of knowledge (Giroux 2011, p. 11). Also, as education is a form of intervention in the world, it also includes both the reproduction of the dominant ideology and deconstructing it. Education is inherently ideological, and due to the dialectical nature of educational processes, they can never be purely about either reproduction or deconstruction. (Freire 1998, p. 90-91)

Understanding development as freedom contributes to the agency of individuals and communities, as it emphasizes grassroots approaches that enable the involvement of local actors in decision-making. Freedom-based development leaves room for multiple ways of imagining development and for what the role of education is within the development imaginary. These theories challenge binary categories such as poverty and wealth, of traditional and modern, and of local and global, striving to broaden these categories into more holistic and contextually based interpretations.

Before moving on to our analysis on the WBES2020, we shall now look into the WB's educational policy and how it became involved in education. Understanding the diversity of theories of development will be the foundation for our analysis, as we need to first understand different views of development in order to be able see behind a specific policy discourse. This will provide us with tools to provide an informed analysis on how education and development are perceived in the specific WB document.

3.2 World Bank, Development, and Education: an Overview

As we shall shortly be analyzing the World Bank Education Strategy 2020 (WBES2020), we find it important to provide a brief overview on World Bank as an institution and explain how it became involved with education. The reason why we decided to analyze WB's education strategy specifically is because the WB has during the past decades become the single largest source of development capital in the area of international education. (Heyneman in Baker & Wiseman 2005, p. 23) Overall, it is the world's largest and most influential multinational funding source for education (Lakes & Carter 2011, p. 108). As Roberto Leher (2004) says, it is necessary to examine the WB's orientations and ideology in order to understand the sense and meaning of current international reforms worldwide, as the WB has to some extent become the world education ministry especially for peripheral countries (p. 143). The policies that the World Bank carefully distributes in client countries are considered to be a policy guideline for education, putting the Bank as an intellectual leader in the educational field, which is why the WBES2020 deserves our full attention (Verger & Bonal in Klees et al. 2012, p. 125). Therefore, understanding the conceptual matrix formulated by the WB makes it possible to comprehend the meaning and sense of many current educational reforms worldwide (Leher 2004, p. 140).

3.2.1 A Brief History of the World Bank

The World Bank was founded in 1944 along with the International Monetary Fund (IMF) at the Bretton Woods Conference of policymakers. The two organizations established in the conference had complementary goals related to development: IMF was created to

promote international economic stability, and the mission of the World Bank (known as the International Bank for Reconstruction and Development at the time) was to both aid reconstruction of the economies affected by the Second World War and to help advance the economy of poor countries. The initial voting shares in both organizations were negotiated directly among the great powers represented in the Bretton Woods meeting, which also has its legacy on their contemporary voting-power. (Babb 2009, pp. 25-26) The WB designated its decision-making power according to the amount of capital investments of each country, whereas for example within the UN, each country was allocated one vote.

The developing countries were interested in the development financing through the newly emerging multilateral agencies, but by the 1950s the United Nations was clearly the preferred organization for development finance. This was due to the fact that the WB had primarily been founded to aid in the reconstruction of Europe, and the issues of developing countries were by no means prevalent in the Bretton Woods meeting. The WB did not seem either willing or able to respond to the challenges in the periphery. Also, the WB had been established with an inherently different governing structure to that of the United Nations, giving much less representation to developing countries. (Babb 2009, pp. 21-22) The WB's purposes, however, soon became closer to those of the Marshall Plan that was created a year earlier: by helping developing nations, social and political unrest could be tackled and the spread of Soviet communism could be hindered while creating markets for U.S. goods (Spring 1998, p. 178).

Initially, the main focus of the Bank was an agency for European reconstruction after the World Wars, but it began to shift in response to the demands of the Cold War and due to the decolonization processes in the peripheral countries (Leher 2004, pp. 145-146). The WB's interest in education is relatively recent since in the 1960s Robert Gardner, a vice president of the Bank, declared that the WB cannot lend for education and health, as it is a Bank (Caufield in Leher 2004, p. 150). The changing point in the WB's orientations was in 1968 when Robert McNamara left his office in the U.S. Department of Defense to become the President of the WB. His Presidency lasted for the following decade, and many suggest that he was responsible both for increasing overall lending and for pushing the Bank into acting in education directly and specifically. (Heyneman in Baker & Wiseman 2005, p. 30; Leher 2004, pp. 145-146) During this period, the WB also became the world's largest multinational collector of financial resources (Leher 2004, p. 147).

Policy papers on education started to emerge, and for instance the 1974 Sector Policy Paper argued that education systems in developing countries were imbalanced, and the recommended solution was a re-orientation of the curriculum in a top-down manner so that employment of graduates could be ensured. Improving the quality of education in the periphery was equated with making education more practical and relevant by shifting the content towards vocational purposes instead of academics. (Heyneman in Baker & Wiseman 2005, pp. 27-28) De facto, from 1962 to 1980, all of the Bank's education investments needed to be justified on the basis of manpower demands (Bartholomew in Heyneman 2003, p. 317). The WB continued increasing lending to education and other societal projects, allowing debts that were higher than many of the peripheral countries' payment capacity. This contributed to economic challenges globally, which eventually resulted in the 1982 debt crisis. The crisis posed new challenges to the financial organizations while increasing the power of the WB. As a response to the crisis, the Bank introduced radical structural adjustment reforms to the vulnerable indebted countries, which made the indebted countries especially in Latin America increasingly dependent on the Bretton Woods organizations in policy planning. (Leher 2004, pp. 147-148)

During the adjustment era, the highly debated Education Sector Policy Paper of 1980 was published. Adjustment Loans were introduced, in which the WB would increase funding and resources in exchange for rapid changes in policy. (Heyneman in Baker & Wiseman 2005, p. 36) The education policy recommended by the WB in the adjustment era was founded in a methodology called the economic rate of return. This methodology led to three basic recommendations, which were to direct public expenditure towards academic and basic education instead of vocational and higher education, to increase private costs in universities, and to introduce loan schemes to aid individuals struggling with tuition fees introduced in higher education. These recommendations became the foundation for the so-called "short education policy menu" that emerged from the educational rate of return analyses and largely became the policy from which states should prioritize educational investments. (Heyneman 2003, pp. 324-326) This historical overview on the Bank's role in educational policy, albeit brief, is useful in understanding their contemporary views on education and development.

3.2.2 The World Bank Today

Over the past decade, the WB has changed its educational strategies, and now presents itself as a knowledge producer and manager in the education sector. The WB functions as a knowledge bank that evaluates the best practices in educational development. This concept was first discussed at the Board of Governors of the WB in 1996, and although the Bank has not diminished its role as a lender organization, it has increasingly acted as a global policy advisor for national governments. (Steiner-Khamsi in Klees et al. 2012, p. 5) Also, the Bank's financial support for education has increased over the past decade since the Millennium Development Goals (MDGs) were established (World Bank 2011). The World Bank Education Strategy 2020 that we shall analyze in this thesis was launched in 2011 as a continuation to the MDGs. The educational priority of the MDGs was informed by the strategy of *Education for All*, a campaign that was launched in 1990 with the purpose of "bringing education to every citizen in every society". It was not until 2005 that this strategy was thoroughly put into action through the Millennium Development Goals, involving the UNESCO and the commitment of 189 countries to adopt the plan. (World Bank 2013)

Education for All called for investment in primary education for all "to ensure everyone completes a basic education of adequate quality, acquires foundation skills — literacy, numeracy, reasoning, and social skills, such as teamwork — and has further opportunities to learn advanced skills throughout life in a range of post-basic education settings" (World Bank 2005). The WB updated its approach towards achieving universal primary education by not only highlighting the accessibility of education for all, but instead emphasizing the need to guarantee *Learning for All*. The Bank's recent device called *Systems Approach for Better Education Results* (SABER) is at the core of this emphasis on learning. SABER has had the task of collecting each country's data, diagnosing, assessing and formulating educational recommendations to participant countries to enhance schooling and learning. Additionally, SABER promotes the creation of a global knowledge-bank to provide immediate access to international educational policies through which policy-makers can be informed. (World Bank 2013, pp. 4-8)

Operating from a classical utilitarian paradigm, educational economists have drawn attention from emphasis on accessibility towards the importance of learning and of performativity in schools (Barrett 2011, p. 119). This shift is evident in the World Bank's

change of focus from expansion to learning. The WB acknowledges that mere access to education is insufficient, and that the focus should now lean towards improving the quality of education and in accelerating learning (World Bank 2011, p. 2). Policies respond to international developments, and often promote international agreements and cooperation giving rise to supranational organizations, which has happened with the World Bank (Olssen et al. 2004, p. 7). The WBES2020 recognizes that international conditions have changed dramatically in the past decade, in areas such as increasing technological developments worldwide, growing international competition, and the emergence of renewed job profiles in the labor market. Additionally, the strategy shows concern for the increasing amount of “youth bulges” within developing and middle-income countries (World Bank 2011, pp. 2-3).

As the MDGs were set to end in 2015, much has been debated about the post-2015 period. In countries that begun with low rates of enrolment, the MDG of *Education for All* has often resulted in low completion rates, and the rapid progress in national enrolment rates has often disguised the fact that exclusion remains a prevalent issue (Barrett 2011, p. 121). Despite attempts to portray the MDGs as an international project, they are criticized for locating development to the global South. They often overlook development outside of the “developing world”, as well as the interconnectedness of poverty and wealth and of vulnerability and risk both within and between countries of the periphery and the core. (Sumner & Tiwari 2009, p. 835) The influence that they have had in donor countries has been limited to committing to international development expenditure, whilst aid-recipient countries have been expected to direct high-level policy-making across different sectors with the borrowed resources. As a condition to receive World Bank’s loans, aid-receiving countries are required to have a Poverty Reduction Strategy Paper to provide the framework for the development operations. (Barrett 2011, p. 121) Understanding the continuum of the developments in WB policy is important in conceiving its contemporary policy. The MDGs provide the most recent basis for the WBES2020 that we shall analyze in detail in our empirical framework.

4 Empirical Framework

The empirical part of this study is realized as a Critical Discourse Analysis (CDA) on the World Bank Education Strategy 2020 (WBES2020). Although this strategy was published already in 2011, and has thus been analyzed by a number of scholars, we find it important to engage in the academic debate regarding World Bank education policy as it helps us understand transformations occurring in educational systems worldwide. As the single largest worldwide financier and expertise provider to education, the WB is in a considerably powerful position in directing international and national educational policies. WB education sector documents intend to shape education policy and practice especially in countries where the Bank is active, and as such documents reach policy and decision makers in countries that borrow from the WB, these documents are highly influential. (Klees et al. 2012, p. xv)

By using Critical Discourse Analysis as our method, we can provide new insights on the WB discourse on education and development, as subjective interpretations made by researchers are typical of CDA. As our interpretations of the document are based on our ontological and epistemological assumptions, it might be possible to find new dimensions in the policy. Also, the close connection between our theoretical framework of diverse theories of development and education and our analysis provides a broad critical lens for analyzing the WBES2020. Our first research question was largely discussed in our theoretical framework, and now we shall continue with our second research question concerning the notions of development and education in the WBES2020. In this empirical section we seek to shed light on the ways in which this particular strategy perceives development and education in relation to our theoretical framework. First, however, we need to elaborate on our method of Critical Discourse Analysis that we used as a foundation in analyzing the policy document.

4.1 Critical Discourse Analysis as a Method

The world gains meaning through discourse, and thus, language is a mechanism through which the social world (identities and relations) is generated. Therefore, transformation is possible by changing discourse. (Jorgensen and Phillips 2002, pp. 8-9) As this study is

concerned with a text and hence, with language and its relationship with the social world, we found Critical Discourse Analysis (CDA) the most suitable methodology for our thesis. CDA provides us a framework for studying language with an emphasis on language in relation to power and ideology (Fairclough, 1992, p. 1). In this section we briefly describe the fundamental ideas of CDA and provide rationale for choosing it as the principal method for this study.

For Van Dijk (1993), CDA is a method that examines the production and reproduction of dominant discourses. It focuses on unveiling structures, strategies or other properties of text, talk, verbal interaction or communicative events that have a role in modes of reproduction. (pp. 249-250) CDA aims to expose power-relations that are reinforced through text. It is not limited to the examination of specific structures of text, but examines and gives insights on the way that discourse omits or reproduces inequalities and power-relations, always placing the text in a sociopolitical context. The aim of CDA is to uncover certain aspects of reality that are often taken for granted in order to reveal how power operates through these assumptions, as observers cannot eliminate their own cultural biases. The idea is to trace the possible origins and implications of assumptions as a product of ideological discourses that constitute the interpreter as a subject. (Andreotti 2006, p. 18) It is worthwhile to pay attention to discourse especially when interrogating the assumptions made around the concept of development and the “third world”, as the language that is unconsciously used is often “far from innocent” (Sheppard et al. 2009, p. 52).

Our analysis is largely based on Norman Fairclough’s elaboration of Critical Discourse Analysis as his framework of CDA is considered to be one of the most sophisticated analyses of the relationship between language use and social practices. Jorgensen and Phillips (2002, pp. 61-64) draw on Fairclough and Wodak in identifying five aspects that constitute CDA. These aspects include:

1. The character of social and cultural processes and structures is partly linguistic-discursive
2. Discourse is both constitutive and constituted
3. Language use should be empirically analyzed within its social context
4. Discourse functions ideologically
5. Critical research

By being critical, CDA enables the researcher to aim for possibilities of social change by investigating and analyzing power-relations in a society. As the objective of this study is not only deconstructing the concepts of education and development given by the World Bank, but also providing some alternatives for understanding and constructing these ideas for increased appreciation for diversity, CDA seems to be a suitable method for the purposes of this study. It gives us the possibility of understanding power-relations that enable some discourses to be hegemonic, but also opens doors for reimagining possibilities of change.

CDA does not understand itself as politically neutral as it is committed to social change by taking the side of oppressed groups in the name of emancipation (Jorgensen & Phillips 2002, p. 64). In this sense we do not strive for objective neutrality either, but rather shall strive to be open and transparent about our personal standpoints while engaging in our critical analysis. The discourse analysis that we shall conduct is our interpretation of the data, and is therefore open for critique and further analysis. The subjective interpretations of the researchers are central to CDA, but in explaining our analytical process we shall aim at transparency. We do not aim to reach any one truth concerning discourse of the whole World Bank organization, but rather will offer one interpretation of their discourse in a specific document based on our theoretical framework and personal insights. This can provide tools for understanding some underlying ideas concerning development and education behind the discourse of the World Bank.

4.2 Critical Discourse Analysis on World Bank Education Strategy 2020

For the purpose of this thesis, we have focused our analysis on specific sections of the WBES2020. These sections include the Executive Summary, Part I: *Rationale*, Part II: *The World Bank Group's New Education Strategy*, and Part IV: *Implementation Levers for the New Strategy*. These chapters altogether present a concise overview of the why, where and how of the strategy, and therefore we found it meaningful to focus our analysis on those. We decided to leave out Part III – *Lessons from Previous World Bank Group Work in Education* from our analysis as we provided some insights into the World Bank Group's history in our theoretical framework, and in our analysis we chose to focus on the most recent WB strategy.

As we want to emphasize the mutual and overlapping effects that discourse has on political economy and social studies, we will highlight the discursive narratives that we have distinguished from the critical analysis of the policy paper. In our first reading of the policy text, we started by detecting recurrent patterns and tensions within the text and by formulating an overall impression of the Strategy. After close reading of the text, we considered possible omissions and inherent assumptions in the discourse in the light of our theoretical framework. We continued our analysis by picking up sections, sentences, and choices of words in the text that repeated some patterns or discourses. After gathering a large amount of data in this manner, we began to organize them and create patterns that we found prevalent within the policy document.

During our analysis we distinguished a number of patterns that we began to organize into larger *discursive narratives*. Additionally, we focused on detecting tension points that Fairclough calls *moments of crisis*, referring to times when things are changing or going wrong. These moments provide opportunities to deconstruct discourse that is naturalized in a text. (Fairclough in Rogers 2011, p. 157) We created two broad discursive narratives which we labeled as *the Patronizing Development Narrative* and *the Universal Education Narrative*, as all of the patterns we had distinguished were possible to organize within these broader narrative categories. Despite the recurrent overlaps and interconnectedness of these discursive narratives, we decided to organize our data within these two distinct categories. Following the creation of these broader narratives, we organized the various patterns into coherent categories by combining similar patterns. This resulted in three sub-categories for the discursive narratives that we shall henceforward refer to as *patterns*. Each of the discursive narratives contains three patterns that shall be further explained in our interpretation of the data. These patterns are labeled as follows:

Discursive Narrative 1: Patronizing Development Narrative

- Location of Development
- Linear Development
- Global Knowledge

Discursive Narrative 2: Universal Education Narrative

- Employability
- Results-based Policy
- Utilitarian Education

4.3 Interpretation of the Data

The World Bank Education Strategy 2020 attempts to give a more comprehensive and inclusive approach to education and development than previous WB strategies. However, through a thorough analysis of the discourse, it was possible to detect different patterns, tensions and paradoxes within the document. The following sections give an analysis of such findings through CDA, complementing our interpretations with previous analyses of the same document. For purposes of clarity, we refer to only the page number in our analysis whenever referring to the Strategy. We did our own analysis before looking into other research in much detail in order to avoid guiding our own interpretations based on other peoples' findings. Other research regarding this policy document will be intertwined in our discussion.

4.3.1 Patronizing Development Narrative

The first discursive narrative we distinguished from the WBES2020 is a discourse of patronizing development. The Strategy seeks out to emphasize locality, to embrace a multisectoral approach to development, and to carefully balance between accountability, effective assessment, and local autonomy. The WB has increased its recruitment of local staff and increasingly locates education staff in country field offices instead of centralized head offices (p. 24). The agenda is to “analyze globally and act locally” (p. 6) by creating a global knowledge base for best education practices, where local education reforms could then draw from.

Despite the surface-level emphasis on locality, there are some fundamental contradictions in the Strategy. Greater autonomy at the local level is hard to reach if the framework within which educational reforms can be imagined is framed with some *best* global practices, and especially so if educational finance is tied to reaching some predetermined set of standards. The language used is often patronizing, and despite the call for locality, for instance *targeting the poor and vulnerable* that are portrayed as the key priorities of the Strategy (p. 24) are not given agency. Also, “the poor and the vulnerable” and “the developing countries” are addressed as *them*, which implies that they are not included in the policy-making. The Strategy is also silent about development in the wealthier economies, which

implies that development is an end-state that has already been achieved in these countries. Therefore, we call our first discursive narrative Patronizing Development Narrative, and shall now present three patterns that construct this narrative. We shall explain our interpretations of where the WBES2020 located development, discuss the linear representations of development, and challenge the perceived globality of the knowledge base central to the Strategy.

4.3.1.1 Location of Development

An important pattern we identified in the discourse of the WBES2020 is its location of development. It continually refers to South-South learning to achieve better learning results, and also points out to potential in North-South and South-North learning. This is not only problematic in terms of physical geography, but also in terms of neglecting internal diversity within nation states both in the “South” and the “North”. As Saith (in Sumner & Tiwari 2009) claims, development is often portrayed as something that happens in the “South” to the poor, neglecting vulnerability and wellbeing in both “North” and “South” alike (p. 835). The prevalent pattern is to equate locality with national interests as opposed to global interests, which constructs a homogenized view of plural nations. The strategy articulates its approach as “grouping countries by whether they are countries with fragile situations, low-income countries, or middle-income countries” (p. 55), which is statistically logical, but unresponsive to the diversity between and within these vast categories. Expressions such as “promoting country-level reforms” (p. 1), “help countries integrate education into national economic strategies” (p. 46), “education strategies responsive to national socio-economic needs” (p. 46) construct notions of homogenous national interests, which neglects the plurality of nations.

The patronizing development discourse is constructed with recurrent diminutive word choices such as using “even” when talking about peripheral countries and development, implying that it is somehow unexpected to achieve progress in these areas. Statements such as “*Even* the regional economy of Sub-Saharan Africa is projected to grow” (p. 21), “Mobile telephony has been adopted *even* in the rural areas of poor countries” (p. 22), “*even* in low-income countries” (i.e p. 14), “*even* in the poorest communities” (p. 2), and “*even* in poor learning environments” (p. 3) subtly imply that these areas are far from reaching development standards, but with outside help from the donor countries, it is

possible to reach development *even there* [italics added]. A closer look at the sentence “Education research in *wealthier countries* also *yields lessons for developing countries, allowing* North-South learning, and because wealthy countries have no monopoly on good educational practice, South-North learning has *great potential as well*” (p. 64, italics added) reveals some important aspects of the narrative of patronizing discourse. Comparing the expressions “yields lessons” and “allowing learning” that are used for North-South learning with the phrase “has great potential as well” in the context of South-North learning exposes important power-structures that the discourse constructs. Although “wealthy countries have no monopoly on good educational practice”, they are in the position to “allow” learning as opposed to mere potential of doing so.

The strategy constantly refers to *poor countries* or the *developing world* versus the *rich economies* and *rich countries*, which gives a rather deterministic and narrow view of these areas and reinforces polarization. Furthermore, the terms *South, developing, poor countries* and *poor economies* are interchangeably used throughout the strategy. South-South learning is emphasized as “countries seek out examples of successful approaches in other countries in similar situations” (p. 64), and because internationally comparable information about education systems “will facilitate more effective South-South learning, by enabling countries facing specific educational challenges to learn from the stronger performers.” (p. 7) Levels of national income, technologization, and measurable learning outcomes seem to define educational performance and overall development on a wider note: “Some countries achieve much higher levels of educational performance -- than would be expected based on their incomes.” (p. 7) South is repeatedly represented as “them”, who are in need of help and guidance, regardless of some mentions of participatory and locally defined development.

4.3.1.2 Linear Growth-Driven Development

One prevalent pattern that we distinguished from the WBES2020 is a linear, top-down approach to development. The strategy sets out to “target the poor and vulnerable” (i.e. pages 3, 24), and to help low-income countries reach the benefits of a shared idea of development. Although the Strategy is presented as a worldwide education strategy, it focuses on addressing the priorities for low-income countries. These recurrent expressions of helping and targeting undermine the agency of people affected by the policy.

Development, in addition to being located in the South, is often described in terms of stages and levels, applying expressions such as *different levels of educational development* (p. 7), *lagging progress* (p. 17), *still far from reaching* (p. 14), *low learning levels* (p. 3), *lagging far behind* (p. 4), *knowledge gaps* (p. 3), *catching up* (p. 74), *closing the gap* (p. 19), etc. Development is also equated with inevitable globalization, and there is a strong underlying presumption of a shared, global future that nations at different stages of development all aim to achieve. Technological advancements are, for instance, referred to as the technological change that *marches on*, and education simply has to adapt to this march regardless of the diverse contexts globally and locally. The understanding of development is not constructed on locally defined views of what is valued, but rather as an inevitable process dictated from above.

Despite repeatedly underlining the challenges that vulnerable and low-income societies face in terms of poverty, the WBES2020 has not a single reference to income inequality in the entire document. By placing development under a linear perception, poverty is implied to be a stage at the lowest step towards development instead of being understood as a result of inequality. By omitting such an essential aspect of power-relations within and between countries, the Strategy turns a blind eye on the structural violence that has excavated a deeper and broader gap between the richest and the poorest percentages of people. The WBES2020 has a strong focus on the effects and challenges of poverty in developing nations, and namely on the relationship between poverty and education, but neglects a comprehensive understanding of poverty as a deprivation of basic needs. According to Sumner & Tiwari (2009), research focused on poverty often ignores the politics behind deprivation by separating it from inequality in the distribution of power and wealth. Such politicization is, of course, an extremely political act in itself. (pp. 836-837)

The strategy reminds its readers in repeated occasions that its approach is “targeting the poor and vulnerable” (p. 3, 24), emphasizing the opportunities for growth that can help developing nations shorten the distance from the developed nations through the acquisition of education, knowledge and skills (p. 24). The rhetorics of poverty presume a society in which the poor are responsible for coping with the adversities of poverty by acquiring the “right” skills and knowledge through education. Education is presented as a trigger for low-income nations to transcend poverty and deprivation and to contribute to economic prosperity (p. 12), while there is no mention to the structural inequality that caused poverty in the first place. Poverty as such is pictured as an obstacle to growth and a trap in itself, by

exemplifying that “countries with low levels of education remain in a trap of technological stagnation, low growth, and low demand of education” (p. 12), rather than being critically understood as the result of structural inequalities. As a solution, the Strategy implies that for governments and citizens to eradicate poverty, they need to be fully integrated in the global economy. When addressing the relationship of inequity with academic success, the Strategy claims that the most successful school systems (as measured by international tests such as PISA) have been those with the narrowest gaps in the learning and who truly provide quality education to all students (p. 19). As Verger and Bonal (in Klees 2012) argue, despite emphasizing equity matters in education, the strategy ignores the evidence of why some education systems remain unequal (p.136).

As Biccum (2010) points out, poverty generally has no cause in the discourse of mainstream development (p. 98), which also seems to be the case with WB development discourse. Economic growth seems to be the answer to eradicating poverty and parallel to development, as can be interpreted from the Strategy’s focus on learning “for a simple reason: growth, development, and poverty reduction” (p. 3), and from describing education as “fundamental to development and growth” (p. 1). The expression “Education has many development benefits: more rapid growth and poverty reduction, *as well as* better health, reduced fertility, improved resilience to economic shocks, and greater civil participation (p. 12, italics added) implies a specific emphasis on rapid growth and poverty reduction, which are presented as parallel, and portrays the other benefits as somehow additional.

The parallel of growth and poverty reduction is problematic, especially as the WBES2020 repeatedly refers to annual GDP per capita growth as the measure for economic growth; a measure that has largely been criticized for not managing to capture intra-country inequality. This omission of inequality is alarming, but is prevalent especially in the apparent admiration of the BRICS-countries (Brazil, Russia, India, China, and South Africa), that are referred to as the “new economic stars” that spur developing countries to apply ideas that contribute to economic growth (p. 16) and that have “intensified the desire of developing nations to become more competitive” (p. 21). However, despite the high economic growth rates of the BRICS-countries, they are struggling with widely acknowledged inequalities: data from household statistics reveal that income inequalities in all BRICS countries remain well above the OECD average, and de facto, from the 1990s to the late 2000s these countries saw steep increases in income inequality. To understand poverty reduction, it is crucial to reduce inequality in societies. (Oxfam 2013, pp. 2-3)

4.3.1.3 Global Knowledge

One of the aspects of the Strategy is the continuous use of the notion of *global knowledge*. The strategy opens with a chapter enhancing the need of developing countries to *learn from the stock of global ideas* (p. 1) and *building a global knowledge base* (p. 1) to promote local reforms. Although the Bank mentions that implementation should be appropriately contextualized according to each country's diagnostics and that it does not aim to provide a "one-size-fits-all" strategy (p. 61), it emphasizes that the knowledge-base approach will allow policy-makers to "analyze globally and act locally" (p. 42). The effort to take contextuality into account is visible, though the mechanism to do so remains a top-down approach, departing from the presumed existence of "global knowledge" from which policy-makers are to apply educational interventions to countries. Furthermore, it remains unclear whether the contextuality that the Strategy refers to is reduced to a country level, since the Bank states that the two directions that it will adopt for the educational strategy are 1) to reform education systems at the *country level* and 2) to build a quality knowledge-base at the global level for education reforms (p. 5).

The creation of a global-knowledge base is directly linked to measurability and results-based policies in educational practices and achievement, as will be discussed in the upcoming section. Through the organism of the Systems Approach for Better Education Results (SABER), the World Bank has developed a database with international best practices, constituting the global knowledge base. These are measured by performance on international student assessments, which arguably predict the level of skills in a country's workforce (p. 3). Consequently, developing countries are pressured to choose the "right operational instruments" (p. 6) and benchmark their progress against "international best practices" (p. 7).

The underlying assumption is that it is possible to define some universally applicable "best practices" or "right" instruments for measuring learning, which creates a contradiction in attempting to take local needs into consideration while embracing a top-down approach. Developing countries will be able to reap the benefits of development by "learning from the stock of global ideas and through innovation" (p. 1), implying that local development will only happen within the framework of global ideas. The Bank does not only provide financing and technical assistance for education, but also ideas (p. 2), and it has created the SABER-database with the "analyze globally and act locally"-idea, so that policy-makers

can reform education from the basis of the global stock of ideas. This neglects the complex nature of educational processes that cannot be provided with a final, ultimate answer. Although international dialogue in educational policy can provide valuable insights, it is dangerous to claim the existence of universally applicable methods. It is necessary to understand how ideas and innovations in education can be adapted to particular contexts, but can never be directly transferable as the “best practices” (Barrett 2011, p. 147-148).

In the light of our theoretical framework, we conclude by locating our first discursive narrative of patronizing development mainly in the theory of development as modernization. Also, the discourse of the Strategy resonates with the theory of development as economic growth. Assuming that it is possible to locate nations on a spectrum ranging from “traditional” to “modern” or from “developing” to “developed” societies is typical of the modernization theories (Sheppard et al. 2009, p. 70; Pérez 2009, p. 43). Furthermore, as Escobar (in Rahnema & Bawtree 1998) claims, top-down, universally applicable technical interventions providing needed goods to target populations are also characteristic of modernization theories, together with emphasizing external and measurable strategies (pp. 91-93). The idea of a global knowledge base resonates with Smith’s (1999) critique of universal knowledge presumably not owned by anyone (p. 63). Theories of development as economic growth assume that the benefits of financial growth would trickle down to the poorest populations (Willis 2011, p. 48) – hence, the Strategy emphasizes economic growth as the path to development. Also, societal progress is equated with economic growth, a feature that Sheppard et al. (2009) associate with neoliberalism (p. 96).

4.3.2 Universal Education Narrative

The dominating rhetoric in the World Bank Education Strategy 2020 attempts to imply an encompassing, comprehensive and integral approach towards education and learning. Acknowledging that education is not only reduced to schooling and that school enrollment does not guarantee learning, the World Bank Education Strategy 2020 no longer focuses merely on schooling, but in enhancing learning. The strategy of “Learning for All” therefore aims at promoting a more holistic dimension of education. The attempt to provide an integral approach is evident, as the Strategy recognizes that learning also happens in

non-formal educational spheres and that basic skills such as numeracy and literacy are not sufficient.

Nevertheless, the underlying discursive narrative tends to generalize the purpose of education on a universal level, and constructs notions of education as a tool to increase human capital in a global economy. As stated in the foreword of the WBES2020, “This strategy reflects the best insights and knowledge of what works in education” (p. v). Due to increased diversity in sources of international aid, the WB sees a need to “*harmonize and align* their programs at the country level” (p. 23, italics added), hence to some extent problematizing diversity in educational reforms. Concerned with the efficiency of learning, the strategy stresses the need to successfully measure and compare the performance and the results of client countries in what is referred to as *learning services*. In the following sections we shall further explain three patterns we distinguished related to the narrative of Universal Education. These patterns include education for employability, results-based policy and utilitarian education, where we shall exemplify our interpretations with references to our data.

4.3.2.1 Education for Employability

The WBES2020 constantly stresses the need to teach knowledge and skills for the labor market. By stating that “The new strategy focuses on learning for a simple reason: growth, development, and poverty reduction *depend* on the knowledge and skills that people acquire” (p. 25), the strategy puts deeply structural responsibilities upon the individual, who through his or her capacity to learn should be able to contribute to a country’s development. Learning is conceived as a tool through which an individual will or will not be able to succeed in the economy, as “it is a worker’s skills that *determine* his or her productivity and ability to adapt to new technologies and opportunities” (p. 3, italics added). By allocating the responsibility of increasing growth and development and of reducing poverty upon an individual’s capacity of acquiring new knowledge and skills, the strategy overlooks deeply rooted structural violence and inequality. Adopting such an individualistic and meritocratic view of success and development can consequently give an excuse to governments and corporations to wash their hands of the responsibility of addressing inequality. The problem with the discourse of employability is that there is a foundational assumption that there is employment on the first place. It overlooks the fact

that employability is in fact determined by the labor market, not by the capabilities of the individual. Furthermore, there are complex and deep inequalities that facilitate or obstruct an individual from getting a job, even when they had the credentials to acquire it.

The Strategy often states that what matters in education is not the time spent in schooling, but what is actually learned (see p. 12). Paradoxically, there is a consistent stress on equating schooling with the acquisition of fundamental skills for success, as it also states that “Children and youth cannot develop the skills and values that they need without the foundational education provided by schools” (p. 4). Although the needed skills that the Strategy refers to are not specified, these appear throughout the Strategy as the ones demanded by the labor market. The importance to teach the “skills demanded by the labor market” (p. 2) is constantly highlighted, arguing that “Education systems must adapt to those changes [economic, demographic and technological changes] so that they can *produce* the skilled, agile workforces and informed citizens needed in this environment” (p. 20).

Together with the premise that education happens also outside of formal schooling, the document also adopts the concept of lifelong learning as an essential part of the new strategy. It is stated that the Strategy is built on the premise that individuals learn throughout life (p. 25), but special emphasis needs to be put on childhood and youth because they build the foundations for lifelong-learning. However, despite the holistic approach that the notion of lifelong-learning might evoke, the strategy focuses merely on reading, mathematics and analytical skills that children and youth develop throughout their schooling years. Special attention is put upon young adults, who being in a transition between school and working life and thus should be enabled to *acquire the skills valued in the labor market* (p. 28). Gewirtz (2008) argues that the discourse of lifelong learning has been misplaced from its original purpose, which was proposed by radical scholars in order to criticize the limitations to learning that formal schooling implied (p. 414). Instead of being internally motivated by the pursuit of truth, learning becomes a device for training and retraining of the self to avoid falling behind.

The rhetoric of a more integral and comprehensive approach towards education and development is also visible in the terms through which the Bank alludes to a multisectoral approach. Referring to the Sub-Saharan African regional strategy, the document states that it has adopted a multisectoral approach for the educational reforms of the region based on

the two pillars of “increasing competitiveness and employment” (pp. 67-68). Such a strategy reduces the complexity of the immense region of Sub-Saharan Africa into a problem of lack of competitiveness and employability, and therefore the concept “multisectoral approach” is quite unresponsive to the social, historical, cultural, economic and political transectionality that affects people’s lives.

4.3.2.2 Results-Based Policy

A pattern clearly articulated by the WB regarding both development and education is its performance- and results-based orientation. This is apparent in its frequent reference on “performance-based instruments” (p. 3), “results-oriented financing” (p. 9), “productivity returns to schooling” (p. 12), and on “assessment and benchmarking” (p. 7). The idea of *Learning for All* acknowledges that mere access to education is not sufficient if education is not of quality. World Bank’s response to poor learning outcomes regardless of globally increased schooling during the Education MDG *Education for All* is to enhance accountability by making investments “that have proven to contribute to learning” (p. 4) and to measure and monitor outcomes at all levels (p. 32). The Strategy is articulate about “getting value for the education dollar” (p. 4) and about increasingly focusing the Bank’s “financial and technical aid on system reforms that promote learning outcomes” (p. 6).

The measurability of learning outcomes is also repeatedly highlighted, and although it is acknowledged that new tools for measuring learning beyond basic competencies need to be developed (p. 38), the Strategy mostly refers to international student assessment as a means of measuring learning and skills. The WB “will encourage country participation in international and/or regional assessments, such as PIRLS, PISA, SACMEQ, and TIMSS, and a means of building a global database on learning achievement” (p. 62). Accountability to ensure local ownership in development projects is important, but emphasizing results-oriented financing in promoting accountability can be dangerous. The strategy alleged to offer *bonuses* to teachers and schools who succeed in achieving high student test scores. Such practice needs to be problematized, as it creates a tension between the locally defined educational targets against those established by international assessment tests. Especially the schools and teachers with the most vulnerable positions are more likely to address all educational activity towards passing such examinations, leaving other knowledge aside.

Although locality is called upon in WBES2020, a tight connection with funding and measurable outcomes narrows the framework within which local educational innovation can occur. Promoting international assessment that is often insensitive and unresponsive to local contexts can lead to impoverishment of the curriculum. Though measurability is one of the central themes of the Strategy, there is no discussion on what it is that is being measured. Not all learning can be easily assessed or monitored, especially in a numerical, easily comparable form. By assuming that test scores are a reasonable indicator of quality, while mostly measuring mathematical and literacy skills in comparative assessments, the conception of education quality becomes rather reductionist (Barrett 2011, p. 146).

Comparability and competitiveness are also clear patterns within the results-based policy discourse. Competitiveness is constantly represented as a desirable trait that countries should strive for, and the purpose of education is to provide skills “necessary to adapt to a competitive and increasingly globalized economy” (p. 17). *Increasing competitiveness* is introduced as one of the two pillars in Africa regional strategy (p. 68), and developing nations in general are said to desire to become more competitive (p. 21). Competition is presumed to automatically improve the quality of education, as competition for resources through the use of performance incentives can “generate strong provider motivation to improve service delivery” (p. 29). Not only is education perceived as a service, issue we shall return to in the following section, but also quality of education is parallel to measurable, comparable, and competitive results. Martha Nussbaum (2010) criticizes this approach for its machine-like view of citizens that contradicts the purpose of real democracy in nurturing freedom of thought and agency of each person. Due to an emphasis on easily measurable skills, other skills that are necessary to become fully holistic, critical, and sensible beings, such as humanities and arts, are becoming less and less appreciated in education policies. (p. 2)

4.3.2.3 Utilitarian Education

Despite the attempt of having a more integral approach to education than previous education strategies, the WBES2020 often portrays education as a *tool* to accelerate human capital. The opening paragraph of the strategy states that for developing countries to reap the benefits of development achievements fully, “there is no better *tool* for doing so than education” (p. 1, italics added). In addition to a tool, education is also called a “strategic

development investment” (p. 1), and in numerous occasions, education – and more specifically, teaching – is referred to as *service delivery* and *education service*. The strategy suggests that *competition for resources*, together with greater autonomy at the *provider level* can generate strong provider motivation to improve *service delivery*, which would increase the quality of education as a result (p. 29).

Equating complex processes innate to education and learning with those inherent in the market economy, where a provider delivers services with the motivation that emerged from a competition for resources, reduces the purpose of education to a device of skills acquisition. A prevalent pattern in the Strategy is to simplify education to a service where learners acquire knowledge and skills as a return to investments. In this context, the Strategy constantly points out to individual *benefits* that are received through education, reducing complex humane processes to a transfer of skills, as exemplified in the expression “the opportunity to become educated and thus *receive* these *benefits* (p. 13). Education is not given any intrinsic value for contributing to the well-being of people, but rather is portrayed as a commodity that is open for purchase, competition, privatization, and to other patterns that are applied to the market.

The logic of the global market economy is latent in portraying the processes of education under the relations of demand and supply. “The demand for employable skills” (p. 18), “the demand for education” (p. 12), “the labor market demands” (p. 82) on the one side, while “the supply of qualified educators” (p. 22), “supply of teachers” (p. 37), “supply of high-quality basic education” (p. 57) among others, constructs the role of education as a service whose role is to fulfill the needs of the market. The tone in which teachers are referred to comes along the utilitarian view of education, as it resembles an instrumentalist understanding of their profession. Educators and teachers are “trained” (p. 22), “deployed” (p. 57) and “managed” (p. 61), but it is rarely implied that educational development and change could emerge from the teachers’ grassroots level.

Although the WBES2020 states to have a more comprehensive approach to education by encouraging learning “both within and outside of the formal schooling system” (p. 4) and by including “the full range of learning opportunities available in a country” in defining the term “education system” (p. 5), the prevalent discourse of the Strategy locates learning in schools and equates education with schooling. The Strategy acknowledges that what people learn does not directly correlate with the years spent in school (p. 12), but

simultaneously occupies a discourse of “enrolling children in school and keeping them there” (p. 2.). Despite underlining the full range of learning opportunities, the Strategy never truly considers alternative forms of education to formal schooling. Alternatives are rather portrayed as additional learning spaces for schooling.

The Strategy refers to education as a human right, but expresses its interpretation of this right as a “*worldwide acknowledgement* that depriving a child the opportunity to *basic skills* is tantamount to *depriving that child the chance to have a satisfying life*” (p. 12, italics added). This interpretation exposes a universalization of the Bank’s interpretation of human rights, a deterministic understanding of schooling, and an equation between education and skills-acquisition. “Children and youth cannot develop the skills and values that they need without the foundational education provided by schools” (p. 4) also demonstrates this understanding of education: without formal schooling, it is not possible to acquire skills and values people need or to lead a *satisfying life*.

Based on a combination of our Critical Discourse Analysis and the theoretical framework of theories of development and education, the second discursive narrative of universal education can be primarily located within the theory of development as economic growth including some characteristics of development as modernization. The human capital theory is visible in our findings of the Strategy, especially in its tendency to draw direct causal relations between education and economic growth. Within our theoretical framework of development as economic growth, Colclough (2012) reminds us that the human capital theory often neglects contextual differences in education (pp. 136-137). Neoliberal theory is also predominant in our interpretations of the WBES2020: for instance, Khoja-Moolji’s (2015) points out how the reduction of social processes into measurable metrics is typical to the broader framework of neoliberalism (p. 1), and Brown (2003) affirms that the emphasis on employability is also characteristic of neoliberal policy (p. 107). Another important pattern we have discussed in our analysis resonates with Ball’s (2012) idea of philanthrocapitalism which refers to the integration of business-like models into social and educational matters.

The characteristics of modernization theories are mainly the trend of isomorphism in educational policy that Baker & Wiseman (2005) refer to. This trend has contributed to internationalized education policy that is oriented to international concerns instead of local priorities. (p. 7) In addition to these predominant discourses, the Strategy also included

some aspects of development as redistribution of power by pointing out the state's responsibility in guaranteeing education for all. Also, there were traces of a human rights approach in notions of education as a human right.

In this empirical section, we have elaborated on the two prevalent narratives and their discursive patterns we found in the WBES2020 based critical discourse analysis. We have discussed the interface of our theoretical and empirical frameworks, and shall return to these insights on in our discussion chapter. First, however, we will explain the trustworthiness of this study and on ethical issues that we found prevalent during the research process.

5 Trustworthiness and Ethics

As qualitative researchers, it is essential to clarify our own underlying assumptions and values in order to enhance the trustworthiness of this study. We acknowledge that we cannot be fully aware of our own possible biases as researchers, and due to our interpretation-based analysis, it is not even meaningful to aim at somehow detaching ourselves from our analysis. Instead, we attempt to be transparent about our research process and openly describe our standpoints, as we have already partly done in introducing our research paradigm, and shall now address some of the issues related to trustworthiness and ethics of this particular study.

A great challenge for a critical approach to analyzing discourse is to not over-analyze the data. The challenge is to not solely pick and choose issues that go together with our ideological framework while ignoring parts that do not fit. It is important to be aware of one's own assumptions, and we wanted to avoid manipulating the ideas of the WBES2020 by adding hidden meanings where they actually do not exist. As Van Dijk (2006) points out, discourse structures have many functions, cognitive, interactional, and social, none of which are exclusively ideological. It is crucial to understand that discourse does not only serve to express or reproduce ideologies. Therefore, data should always be analyzed in relation to the context bearing in mind what the intentions of the text are and at whom the text is directed. (p. 129)

However, it is important to note that ideology is inherent in all social sciences, and hence does not only concern openly critical research approaches. As the social phenomena in this study are political, the presence of ideology is inevitable especially when constructing theories of development (Pérez 2009, pp. 26-27). Our data is a result of policy and therefore inseparable from ideology, which is why it is important to note that our approach will not be a neutral one either. The trustworthiness of this study is not based on generalizability, as the aim is to provide insights on underlying ideology in educational discourse in a certain context. Rather than presenting any universal solutions, we wish to offer some interpretations of often hidden meanings in a specific policy document. To avoid a narrow view on the World Bank discourse of development and education, we wanted to first give a thorough overview of diverse approaches to development and

education before starting our analysis of the policy document, and therefore our critical discourse analysis is closely linked to our theoretical framework.

Furthermore, as we are dealing with discourse, we as researchers must also pay attention to the language and discourse used in this study. Smith (1999) stresses the importance of critical thinking when writing, since overlooking one's own discourse can be dangerous as there is the risk of reinforcing and maintaining a style of discourse which is never innocent (p. 36). To address this, we aim for Critical language awareness, which is an intrinsic aspect of Critical discourse analysis proposed by Fairclough (1992). Critical language awareness is not only meant for the analysis of discursive practices when reading texts, but also gives insights of power structures when writing them. This idea draws from Freire's view (in Fairclough 1992) that one needs to think critically of the world in order to understand it and transform it, which is also applicable with language, its production and interpretation. (p. 7)

To avoid often unintentional reinforcement of essentializing polarization through discourse, we emphasize interconnectedness and throughout this study as a means of avoiding simplified and fixed notions of power-relations. We want to emphasize the agency of individuals and communities in guiding the way of their development and to avoid the common victimization of marginalized people. By emphasizing intercultural, cross-cultural and intersectional dialogue, we wish to avoid essentializing moralism and polarized concepts, such as allocating power-relations in time and space frames (as in Western/non-Westerner, North/South, etc.), and instead insist on questioning overarching discourses that constitute hegemonic power across boundaries of time and space. Instead of time or location bound, static concepts such as the North-South divide, we shall be using the terms of "dominant" or "core" and "periphery" to draw attention to power-relations both between and within countries.

It is essential to continue problematizing existing concepts that reinforce deterministic visions. During this study, we found it challenging to address issues related to power-relations, as words often perpetuate the very issues that we wished to confront. Therefore, the language we use needs to adapt in order to respond to changing realities. The core/periphery division proved problematic, as it also implies fixed notions of power at some perceived center, and throughout this thesis we struggled to find less rigid concepts. Nevertheless, as the distinctions of the core/periphery are not confined to some predestined

locations and they reflect the prevalent power-relations between and within societies without limiting them to certain geographical areas, we opted to use these distinctions in this study. We found it important to not present communities as static and isolated from each other in our notions development, but rather wish to emphasize the dynamic and hybrid nature of societies and advocate mutual dialogue and respect.

6 Discussion: a Window to Utopia

“So what's the point of utopia? The point is this: to keep walking.” – Eduardo Galeano

Development is a complex concept tightly connected with culture, values, ethics, politics, and power-relations. It implies changing the world for the better, which makes development inherently optimistic and utopian (Peet & Hartwick 2009, p. 2). The ways in which development is conceived are deeply embedded in ontological and epistemological assumptions, and development is therefore understood in as much diversity as there are people. Development is change towards an aspired better future, but the imagined better futures can differ to a wide extent. It is dangerous to adopt any particular development discourse without critical examination. As development is a culturally grounded process, developmental objectives should be defined locally instead of defining what development is outside of a particular cultural sphere. Developmental agenda should be open to democratic debate and dialogue, and the people affected by the agenda should be able to actively participate in the processes of decision-making that might enhance their well-being.

After critically analyzing the discourse of the World Bank Education Strategy 2020, we found it easier to locate the discourse within certain theories of development and education. Drawing from our descriptions of diverse ways of understanding development and education, we conclude that the discourse of the Strategy can be largely placed within the framework of development as economic growth and as modernization. It is important to remember that ideological discourse is personally and contextually variable (Van Dijk 2006, p. 124), and that there is never only one set of ideas, for instance the neoliberal framework, that constitutes educational reforms (Ball 1998, p. 122). However, as policies are not merely texts, but also discourses, they construct the frameworks for understanding education in general (Trowler 2003, p.132). Dominant discourses create reality, and therefore it is necessary to draw special attention to the rhetorics of the Strategy (Nordtveit in Klees 2012, p. 21).

The five elements of neoliberal effects on educational policy we distinguished in our theoretical framework based on Carter & O'Neill (1995) were quite prevalent in the WBES2020. The Strategy emphasized the connections between learning, schooling, and employability, occupied an outcome-based approach to learning, emphasized skills and

competencies, encouraged control over assessment, and recognized the important role of the private sector – all aspects articulated also by Carter & O’Neill. In addition to these aspects, the discourse includes global knowledge, international competition and technologization as inherent aspects of development. An educated individual is perceived as meaningful human capital for the labor market and the economy, and learning as a lifelong device through which the most useful knowledge and skills can be acquired.

Learning is a central aspect of human development, and should not be limited to the measurements of international assessments. Too often teachers, students and schools are more concerned about the specific requirements of these examinations, than of the broader, more holistic potential that education has. Education has to be understood as a process that happens in diverse settings throughout a human being’s life. It accompanies individuals in their physical, emotional, social, spiritual, and intellectual development. It expands the scope of imagined possibilities of a person, and is central in creating truly liberated and conscious beings. There is a need for a more comprehensive approach to education that would understand people as holistic beings and appreciate the agency of individuals. Education should respond to what is meaningful and relevant in a community or a society while enhancing wellbeing and nurturing freedom. As education and learning are fundamentally human aspects, they must not be treated as commodities or tools for mere economic growth.

The discourse of the WBES2020 resembles Jeffrey Sachs’s (2005) understandings of development as a linear and economically-dictated process. By continually encouraging donor countries to “target the poor and vulnerable”, the WBES2020 implies a top-down approach with increased investments without addressing structural inequalities. The complete omission of both global and local inequalities is one of the crucial ‘moments of crisis’ in the Strategy, as inattention to inequality may reinforce and reproduce inequality and injustice (Nordtveit in Klees 2012, p.21). The discourse largely overlooks issues of equality and justice ignoring more complex sites of political tensions, which is the potential that influential policy documents such as the WBES2020 have (Woodside-Jiron in Rogers 2011, p. 157).

The conception of development as an end-state should be challenged with a more processual idea of development (Makuwira 2006, p. 193-194). Binary distinctions between developed versus developing countries evoke the idea of development as an end-state that

has already been achieved in certain countries, and that it is precisely that state which the rest need to achieve. As development is inherently pluralistic, fitting it into binary categories is not only artificial, but also undermining the potential of development for meaningful change. We need to challenge the linear view of development and continually reassess the fundamental critique of the whole development enterprise, as only through informed critique it is possible to create new conceptions of development. Development is often located into specific geographical areas or communities although development should be recognized as an ongoing process throughout the world (Jones in Willis 2011, p. 266). There can be no all-encompassing definition for what development is, as development should provide meaningful responses to locally defined understandings of well-being, enhancing the freedom of individuals and communities. With emphasis on locality we do not mean to exclude importance of the broader opportunities for dialogue, but it is important to highlight grassroots approaches in order to contribute to culturally relevant responses both locally and globally.

To avoid simplifications, it is worthwhile to note some deviations from the predominant discourses of economic growth and modernization within the WBES2020. There were traces of a human-rights based approach to development and education, some references to the role of the state in guaranteeing educational opportunities, and ideas of a broader role for education in contributing to people's wellbeing. This demonstrates how discourse does not necessarily represent purely one ideology although it is possible to recognize predominant perspectives in which the discourse is embedded. The ten-year agenda for reaching *Learning for All* is soon coming to an end, and the World Bank is already in the process of renewing its Strategy, which also might signify possible changes in its discourses of development and education.

International policies concerning development and education continuously update and renew their visions and goals. As a continuation for the MDGs, the United Nations published the Sustainable Development Goals (SDGs) in 2015, which are central to the new 2030 Agenda for Sustainable Development. The goal that specifically concerns education is guided by a vision of working "towards inclusive and equitable quality education and lifelong learning for all" (World Bank 2015, p. 6). The World Bank has a permanent seat in the Education 2030 Steering Committee alongside with UNESCO and UNICEF, and will therefore continue to have a major influence on educational and development policy in the following decades. (UNESCO 2015, p. 27). The MDGs have

been largely analyzed, and similarly to the post-2015 agenda for the MDGs and the debate surrounding the reformations of development agenda, the development imaginaries of the World Bank will also surely be renewed after reaching the year 2020 in coordination with the SDGs. In this study, we focused on analyzing the discourse of the WBES2020, but for once the new strategies are published, it is important to continue the critical examination of the emerging policies. Also, it would be interesting to analyze how the WBES2020 has influenced education reforms in various settings.

As Jessica Faieta (2015), the Director of the Regional Bureau of UNDP for Latin America and the Caribbean, says: “‘more of the same’ in terms of growth – and public policies – will no longer yield ‘more of the same’ in poverty and inequality reduction”. We need to seek for solutions outside of the predominant paradigm of growth, and instead, focus on recognizing and deconstructing structural inequalities. The concept of poverty should be expanded beyond economic statistics to include deprivation of human rights and liberties. The discourse of eradicating and combatting poverty should be replaced by eradicating inequality and injustice. This is not to say that poverty is not an issue – sufficient material needs are a prerequisite for freedom – but the conception of poverty as reduced to mere income measures is narrow and therefore often harmful. By working within the existing economic logic where profit maximization prevails, it is not possible to confront the crucial problems facing humanity (Went 2000, p. 121).

Similar critique applies to educational issues. While education most certainly has impacts on development and vice versa, these impacts vary remarkably depending on time and place. Education outcomes are often far more complex and less direct than is presumed, which is why the linear and causal thinking of education and development needs to be challenged in development policy. (Colclough 2012, p. 144) Structural issues are too often overlooked in educational policy targeting specific development objectives. It is not realistic to presume that education alone could resolve complex issues of structural inequality. Educational reforms especially in the peripheral countries often face complex challenges in applying educational change, as they are encountered with complicating factors of context and history (Brook Napier in Baker & Weiseman 2005, p. 60). If meaningful change is to be achieved through education, structural inequalities need to be addressed and social inclusion must be a priority both in and outside of the educational arena.

A democratic, freedom-based understanding of development requires radical transformation of the society and of the conditions of reproduction, redefining the notion of economic growth to describe growth of productive capacity to meet people's basic needs instead of the expansion of the global economy in general (Peet & Hartwick 2009, pp. 290-292). However, as development is also political, development understood as freedom often conflicts with the interests of those in power, and therefore it will remain a great challenge (Makuwira 2006, p. 198). Development should strive to increase freedom – not in a sense of absolute individual freedom that might violate the freedom of others – but rather, an ethically grounded concept that we understand as life free of deprivation. Conceptualizing development as freedom enables increased diversity in imagining what development could be in practice, and is therefore more responsive to local contexts.

Local philosophies should be at the core of both development and educational policies as they enable the detection of goals and purposes that communities hold dear (Venter 2004, p. 149). It would be of prime importance to return to addressing the basic ontological and epistemological questions of what is the purpose of education and how development is imagined in specific contexts. Development goals should be inclusive, democratic and relevant for the communities affected. Through mutual dialogue, it could be possible to create alternative frameworks for both development and education that are centrally concerned with more holistic notions of wellbeing and freedom. We understand development as humanizing processes where humanity has been neglected. It means liberation from structures delimiting freedom. It is not an end-state that can ultimately be reached, but continuous reinventions of an imagined future. Neglecting inequality in development policy naturalizes oppression and prevents taking action against structural violence. By confronting issues of inequality and injustice, change can be made not only possible, but also necessary. Although change is never simple, we need to continue envisioning alternative futures. Utopia is at the heart of development. It is the prerequisite for meaningful change.

7 References

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