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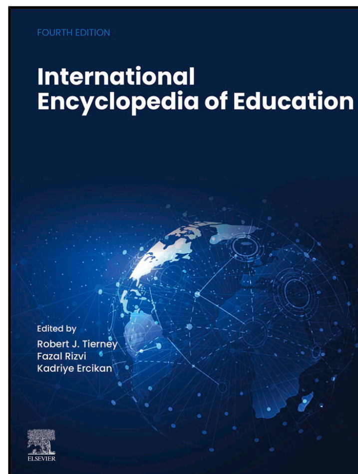

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Six decades of development: the impact of structural adjustment programs on education in developing countries

Óscar Espinoza[a] and Noel McGinn[b], [a] Facultad de Educación y Humanidades, Universidad de Tarapacá, Arica, Chile; and [b] School of Education, Harvard University, Swampscott, MA, United States

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Introduction

National education systems originated in the pursuit of a common language and culture, thought to be essential for the political and economic growth of a nation-state. To reach a large portion of their population, governments designed schools like the factories just beginning to appear in European economies. Mass production of loyal citizens could be achieved by imposing a common curriculum, training of teachers, schedules and supervision (McGinn, 1987). Thus, even though each new nation-state had its own culture, their national educational systems shared some elements of structure and practice. Trade, emigration and tourism provided opportunities to learn about other practices. These similarities found across national systems were the result of relatively balanced processes of lending and borrowing (Cowen, 2012; Steiner-Khamsi, 2004, 2012).

In many other countries, however, school systems were developed as the result of an imposition by their colonial masters. In these cases, schooling originally was designed to acculturate only a small portion of the population, in values and skills that would serve the colonial masters. Colonial schools educated only those few chosen to represent the empire's interests.[1]

Over time, the variety of forms of educational systems was reduced, both by lending and borrowing and by colonization. One result has by change in the original objectives of schooling. Some systems now focus more on teaching of work-related knowledge and skills and give little importance to citizen formation and cultural traditions. One analyst has proposed that today there are six major types of national systems, those of Germany, France, the United Kingdom, Japan, the United States, and Russia (Cummings, 1999, 2003). Each of these types of education systems has shaped the systems of other countries. As they themselves have borrowed from others, their variety is more like the broad spectrum of a rainbow rather than few distinct colors.

In recent years, some have come to believe that education systems should (and are) converging toward a common mission and structure. This conviction is fostered by observations of the apparent growing similarity of economic, political, and social institutions and practices. The ideational forces that led to the formation of the United Nations, emphasizing common goals and universal rights, are one reflection of the pursuit (by some) of a generic definition of progress or development. Some belief that human progress can best be achieved by following a unilinear path toward the ideal society. Movement along this path would have five stages,

[1]In 1835, Lord Macaulay, advising the Corporation ruling India for the English Crown, proposed that the Indian education system be designed to produce: "a class who may be interpreters between us and the millions whom we govern; a class of persons, Indian in blood and color, but English in taste, in opinions, in morals and in intellect".

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the highest of which would be high mass consumption (Rostow, 1960).[2] To measure progress along the path, a variety of indicators have been developed (United Nations, 1971) some aggregated to a single expression, such as Gross National Product (GNP).

As levels of educational attainment are higher in wealthier countries than in poor, education was considered essential for development (Harbison and Myers, 1964). The results of education were defined as a form of capital, which (capitalist) economic theory posited as the dominant factor in production and economic growth. Education is the major producer of human capital; countries seeking to develop should therefore invest in education (Schultz, 1961; Becker, 1962).

The identification of relationships between social and economic characteristics of a country and its level of development encouraged the elaboration of a theory that argued that with increased contact the economies (nations, societies, cultures) of the world were becoming or would over time become more alike. This progress was driven by the assimilation of the values, practices, skills of the more modern, developed nations (Inkeles, 1966; Kahl, 1968; Boli et al., 1985; Reich, 1992; Meyer et al., 1997).

Convergence in educational policies and practices, it was argued, would accelerate a country's progress along that path. Modernization required replacing the institutional structures found in less developed countries with those found in the more advanced countries. As one enthusiast put it:

> Clearly educational systems must adjust to the new global environment … the appropriate response is a restructuring of the policy changes [that had been] dictated by local needs and responses … policies and practices formed around a logic of local schooling for local needs are no longer viable. Neither is a system of centrally controlled national schooling. What is needed is a system of schools which serve specific populations with specific resources and students. Their future workplace is the global market place (Ilon, 1994, pp. 100 and 104).

The horrors of World War II and the formation of the United Nations prepared the ground for a more concerted effort to build a world culture. "Modernization" of education and other social institutions moves countries along that path. To that end, the Western allies in the UN agreed to provide the financial resources necessary to assist developing countries. The administration of funds subscribed by the participating countries was to be mainly the responsibility of two organizations, the International Monetary Fund and the World Bank.[3] In addition to other activities, these two organizations made interest-bearing loans to developing countries. The Bank also provided technical assistance, often in the form of expatriate resident advisors paid through the loan.

At the same time, a number of countries created their own development agencies. These provided grants, rather than loans to developing countries. These included USAID, DFID of the United Kingdom, IDRC of Canada, SIDA of Sweden, JICA of Japan and others. Their policies and practices were not necessarily aligned to those of the IMF and the World Bank or those of other countries.

The next sections of this article describe the origin, intent, content and implementation of structural adjustment programs affecting loans for education. The UN's six Development Decades frame the changes that occurred in IMF and WB loans to national education systems. Not all developing countries received IMF and WB loans, and relatively few reports of their outcomes have been published. Where available, country-level detail is provided.

The first two development decades 1960–79: the introduction of structural adjustment

The UN's First Development Decade began in 1960. The UN agencies placed major emphasis on achieving economic growth in poorer nations, to be stimulated by transfers of capital. Increased national revenues in recipient countries, it was believed, would prompt increased public spending on education and health. The lenders (IMF and World Bank) anticipated that significant advances would be achieved by the end of the decade. And in fact, many of the low-income countries had by 1970 achieved economic growth rates of 5%. Excited by what seemed to have been the first step toward a Golden Age, the United Nations General Assembly, announced a Second Development Decade.[4]

For various reasons, the Second Decade was less successful. Inflation in the United States associated with the costs of the war in Vietnam and pursuit of the Great Society, led to US withdrawal from the Bretton Woods Agreement that had controlled currency exchange rates (Bordo, 2017). This contributed to price instabilities around the world. Between 1973 and 1975 the economies of Western Europe and the United States slowed significantly. The developed countries reduced their assistance to developing countries. Economic growth in newly industrializing countries created instabilities in the economies of the more developed nations. Oil producing countries reduced their production quotas resulting in a rapid rise in gasoline prices. Economists opposed to the use of economic planning (by the state) called for a market system (Toye, 1987). Confidence in state-level economic planning declined; economic growth was characterized principally by expansion of the private sector and the development of a market economy with competition and competitive pricing. International trade increased, as did cooperation between countries. National government planning and economic control diminished (Cable, 1995).

[2]It may be remembered that one of the popular indicators of a country's level of development was its consumption of coal and oil.

[3]The regional development banks (Inter American Development Bank, African Development Bank, Asian Development Bank), which followed, were included in this coordination. For a description of their linkages see Group of Twenty (2017). The OECD, originally called the Organization for European Economic Cooperation, was created by the United States and the European nations to implement the 1948 Marshall Plan.

[4]Dramatic changes in education, health and general prosperity, however, were not yet visible by 1970 (Koehler, 2015).

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In order to continue their efforts to expand their economies, more developing countries then turned to the International Monetary Fund for loans.[5] The collapse of the Bretton Woods agreement on exchange rates required the IMF to monitor its loan agreements more carefully. The creditor countries that supplied the majority of the funds to the IMF found it in their interest to cooperate with this surveillance. Borrower countries were obliged to acquiesce. Beginning in 1979 some developing country governments changed financial policies in order to receive IMF loans (Boughton, 2000).

The World Bank, also a creature of the United Nations, works closely with the IMF (Driscoll, 1995). While the IMF was assigned responsibility for the international monetary system, the World Bank's mission was "to reduce poverty and improve living standards by promoting sustainable growth and investment in people" (World Bank, 1998). The Bank's principal tool for the realization of its mission was loans to the poorer countries. During its early years, Bank loans had been limited primarily to basic infrastructure such roads, dams, irrigation systems, electricity production. By 1970, its attention had expanded to include poverty reduction, education, and health.

In 1968, a World Bank Discussion Paper argued that as the world economy was becoming more knowledge-intensive, all countries had to modernize their education systems. To do this,

> Low-income countries … need to develop the scientific personnel who will understand fully the latest technological advances coming out of the industrialized countries and be able to adapt and apply them for local production of goods and services.
>
> (Haddad et al., 1990, p. 72).

In exchange for financial aid, governments were required to accept the Bank's economic development strategies; these emphasized greater participation in the global economy. In the Philippines, for example, the government was required to abandon its emphasis on import substitution in order to redistribute income, in favor of an export promotion strategy that would increase economic growth (Ascher, 2009).

Must of the economic growth of the 1970s was financed by loans and credits. The amount of debt which poor countries carried sometimes exceeded their GNP. The 1979 regime change in Iran, which interrupted the global flow of oil, led to a sharp increase in world prices and increased inflation. Developing countries that had funded economic growth with loans faced increased interest rates. This reduced government spending.

In Latin America, non-democratic governments were more likely to reduce government spending on social services and especially education. Democratically-elected governments most often reduced other forms of spending and sometimes increased spending on education (Reimers, 1990).

Some countries were no longer able to meet scheduled repayments of loans from commercial banks located in the more developed nations. They turned to the IMF for assistance. In 1982 the Mexican government announced its inability to repay its international debts, exacerbating the world economic situation (FDIC, 1997).

Especially after 1979, the IMF and the World Bank began to insist on Structural Adjustment Programs (SAPs) as the basis for loans made to countries. The SAPs specified the conditions that countries must meet prior to receiving funds from the loan. The principles were laid out in what came to be known as the Washington Consensus. That label was eventually applied to a set of 10 policy actions described as reflecting what many economists in the IMF and the World Bank thought were necessary for modernization (Espinoza, 2002; Williamson, 2004).

Although conceived with Latin America in mind, the underlying principles of the Consensus were considered relevant for all countries. The recommended policies included avoidance of budget deficits, more public spending on sectors with high economic yields, lower taxes, privatization of public enterprises and secure property rights. They represented a turn away from import substitution and a dynamic public sector, toward liberalization, a market system and a smaller state apparatus. They came to define neo-liberal economics.

Given the evident success of the industrialized capitalist nations, neo-liberal economists presumed that convergence toward free markets would result in maximum efficiency in the use of resources. A free market in education requires, it was believed, less direct government control and involvement, and support of a private market by direct grants or vouchers to consumers. Holding educational workers "accountable" for student learning would insure higher productivity.

The third development decade 1980–1989: rethinking structural adjustment loans

National governments reacted in different ways to the imposition of conditions on structural adjustment loans. Several examples illustrate the variety of reactions of recipient countries and the extent to which outcomes matched the expectations of the Washington Consensus. Our focus is on the effect of structural adjustment loans and programs on economic growth, education and social equality.

[5]The IMF at the time had about 40 member countries; the republics of the Soviet Union remained outside.

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Mexico

The first Structural Adjustment Program was proposed by the IMF in 1983. Overwhelmed with debt, in 1982 Mexico had threatened to stop payment on its loans. In response, the IMF insisted that Mexico take four major actions: decrease spending by the government; devalue the national currency; promote exports rather than substitution; and encourage or at least permit foreign investment in Mexican enterprises (Hellman, 1997).

Implementation of the SAP had unexpected results. Real wages dropped to levels of 20 years earlier (Latapí Escobar and González de la Rocha, 1995). Foreign-owned factories introduced automatized production technologies, lowering the demand for more highly educated labor (Alarcón-González and McKinley, 1999). The Mexican government reduced its budget by spending less money on health and on secondary and higher education. Looking back, one analyst likened the experience to a "perfect storm" in which a series of unexpected events combined producing an undesired outcome (Kafferstan, 2017).

Chile

The military junta that seized power in Chile in 1973 implemented economic and social policies consistent with the logic of the IMF and World Bank's structural adjustment loans (Espinoza, 2008).[6] They included reduction of government spending, openness to trade, privatization of public enterprises and free markets. In higher education, the government sought to have students or their families share in the costs of teaching, and established a competitive market among universities. Costs of higher education soared. In 1981 the Ministry of Education initiated a policy of vouchers for both public and private schools based on attendance. The voucher amount was fixed, independent of family income. Private school enrollment in primary and secondary schools increased dramatically, public school enrollment increased only in higher income neighborhoods. Faced by rapidly mounting inflation, the government imposed a fixed exchange rate for the national currency. This worsened the balance of payments with other countries, increasing inflation. Government spending on education declined by 20%. By 1983 Chile was in a recession (Ritter, 1990).

In 1985, with a new Minister of Finance and structural adjustment loans from the IMF and the World Bank, Chile implemented a new set of macroeconomic policies consistent with the principles of the Washington Consensus. Economic growth and employment generation followed (Ritter, 1990). By 1990 the budget was in balance, inflation was declining, and recently de-nationalized industries were expanding their production.

The effects on education were mixed: enrollment at all levels increased in number but disproportionately across income groups. Private school enrollment (which was primarily drawn from upper income groups) continued to increase as a proportion of total enrollment. As the government reduced its subsidies to public universities, the universities introduced special fees and became increasingly selective in admissions. Students unable to afford four years of university enrolled in 1- or 2-year technical training centers. Less selective (and even more expensive) private universities increased their enrollments. Many lower-income students financed their university studies with loans from commercial banks (Espinoza, 2008). Structural reform in Chile had enabled the country to move from a system of "elite" higher education to one of "mass" higher education (Trow, 1973), but the mass system dominated by private universities reinforced its elite character. By 1990, 72% of students in private universities were from families in the top 20% income bracket, compared to 4.2% whose families were in the lower 40% of the household income distribution (Larrañaga, 1992).

In 1989, after a national plebiscite, the military government was replaced by a coalition of left and center parties. Macroeconomic policies were left intact with only minor changes, but new social policies reversed the earlier orientation toward reduced government involvement in education and health.

Ghana

A SAP in Ghana in 1984 enabled the country to recover from a recession that had persisted from 1977. The inflation rate dropped from over 100% in 1983 to below 40% in 1984 and continued to decline. Economic growth, which had been negative, averaged over 5.6% for the next 6 years. The success of Ghana was such that it was considered a model country. USAID, the World Bank and the IMF named Ghana as one of its outstanding successes.

> Ranked on the basis of growth, savings, exports and investments, the five most successful adjusting countries were, in order: South Korea, Mauritius (dubbed the Korea of Africa), Morocco, Ghana and Thailand.
>
> (World Bank 1991, p. 3).

Economic stabilization had been made possible by establishment of a powerful state apparatus willing to use violence to insure compliance with its policies (Kraus, 1991). The military leader seizing power in Ghana in 1981 tolerated no criticism of the policies of economic recovery recommended by the IMF and World Bank. His refusal to re-negotiate or to soften the recommended policies provoked considerable resentment among the people of Ghana. For example,

[6]The military's advisors were economists trained at the University of Chicago influenced by Milton Friedman, whose ideas also were absorbed by others espousing the premise of a global economy.

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> The Trade Union Congress (TUC) … vigorously protested SAP policies, students the rising school fees and university costs, peasants new borehole and well fees, and consumers the end of subsidized goods and rising prices. Businessmen … protested restraints on credit and 30% interest rates, industrial managers the liberalization of trade which undercuts the sale of Ghanaian goods, and some state corporations their sale to private interests or liquidation. Intellectuals, with little access to the public, …criticized SAP policies by pointing out their inadequacies, inequities, and social costs.
>
> (Kraus, 1991, pp. 19–20).

The government survived continuous opposition during the 1980s, in part because of the political actions taken to contain protest, and in part because of cultural values of the Ghanaian people and perhaps sub-Saharan Africans in general (Haynes, 1991). In distinction with the United Nations Declaration of Human Rights, or the rights listed in the constitutions of Europe or the United States, Africans may give more importance to social harmony rather than to individual freedom. The "people" are entitled to be treated with the same dignity as the "person".[7] A comparative review of theories of human rights noted that from this perspective, collective rights should be honored first, then economic and social rights. Only then are political and civil rights respected (Vincent, 1981).

During the 1980s public spending on education in Ghana was lower than it had been during the 1970s. The government instituted fees for books and residence in secondary and higher education institutions. Schools were left lacking fundamental services. Only beginning in 1989 did the Ghanaian government began to restore drastic cuts made in health services and education (Kraus, 1991). By then the government had organized supporters into "community watch" groups that helped control unrest. The government's success and that of Ghana could be attributed to factors not anticipated by the IMF or the World Bank.

Zambia

The implementation of structural adjustments during the last years of Zambia's Second Republic were marked by high levels of public opposition. The program begun in 1983 called for a currency devaluation, a cap on wage increases, a reduction in government employment, and a currency exchange auction system which benefitted foreign commercial firms and contributed to increased prices of commodities. At the same time public expenditure on education was reduced, affecting the purchasing power of teachers and access to schooling. Education's share of the national budget was between 1984 and 1988 reduced by 8%, and spending per student fell by 60%. The secondary school gross enrollment ratio dropped from 30 to 20% of the age group (Simutanyi, 1996).

As in Ghana, Zambia was governed by one party. And, as in Ghana, there was considerable opposition to the effects of the structural reform agreements, from the business sector as well as from the labor movement. Also as in Ghana, policies were imposed by the president without agreement from those outside his party. Unlike Ghana, the opposition in Zambia was able to generate enough resistance to frustrate the government's efforts (Simutanyi, 1996).

The effects of structural adjustment in Zambia can be attributed to a different set of contingencies than those that operated in Ghana. As one analyst has written, in order to succeed a government must be determined to impose its will but also know how to insulate itself from pressures by those in opposition (Simutanyi, 1996). Zambia had prior experience with structural adjustment loans, but the one-party government then in power (1973–91) had not been able to carry through policies promoted by the World Bank and IMF. The movement to restore democracy was motivated (in part) by opposition to structural reforms. Although they had competing objectives, organized labor cooperated with business interests to force out the government. They then negotiated a series of compromises that led to significant reform.

A broad overview

The effect of SALs and SAPs between 1980 and 1989 has been analyzed by comparing government spending on education during 1980–1989 in the countries receiving loans with that in 50 other countries not receiving loans listed in the(World Bank's, 1992) report on lending (Reimers, 1994). During the period the Bank initiated structural adjustment loans or programs in 57 countries around the world (World Bank, 1992). Some 27 countries experiencing economic difficulties received two loans during that period, another 30 received at least one loan by 1990.

Using World Bank data, Reimers (1994, 1997) first examined whether government expenditures on education changed (in proportion to GNP) between 1980 and 1990. He assumed that a reduction in expenditures would indicate that the government considered other sectors to be of more importance than education. In general, countries receiving loans reduced their spending on education in proportion to GNP. This response was more marked among the sub-Saharan African countries, but also true in Latin America. Overall, Asian countries receiving loans increased their spending on education in relation to their GNP. Within each category of countries (e.g., region, number of loans) there is considerable variation in GNP. There is no association between 1980 level of GNP and amount of change between 1980 and 1990.

The next comparison was with respect to changes in government expenditures on education. The effect of the austerity induced by the loan conditions was an overall reduction of government spending. On average, although total budget expenditure was reduced, the proportion allocated to education increased. This was true for the Latin American and African recipients, but not

[7]Paraphrasing the Banjul Charter on Human and People's Rights, passed unanimously in June 1981 at the 18th assembly of heads of state and government of the Organization of African Unity (Vincent, 1981, p 39).

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for the Asian countries, who reduced their (already higher than in the other regions) spending on education (but increasing in relation to GNP).

The increase in expenditures in Africa and Latin America more heavily favored higher education although those regions had lower gross enrollment ratios in primary and secondary education than did Asia. Overall, by 1990 African countries that had received two loans were spending 77 times as much per higher education students compared to primary students, compared to a ratio of 38 to 1 in countries not receiving loans. The ratio had been 70 to 1 in 1980. In Latin America and Asia higher level education students cost only 7 times as much as primary students. The analysis concluded that:

> The politics of adjustment favoured the groups with greater lobbying power, namely urban dwellers and those from higher income groups. This explains why the disparities in allocation between education levels remained, or in some cases worsened, in spite of adjustment.
>
> (Reimers, 1997, p. 16).

The fourth decade: structural loans and programs during the 1990s

Latin America

Additional structural adjustment loans and programs were made during the 1990s. Some were seen as highly successful, others the target of strong criticisms. The policy actions of SAPs were judged as inequitable, as they affected some groups in society more than others. For example, a reduced federal budget in Mexico lowered food subsidies, on which many unemployed single mothers depended. In six Latin American countries, the effect of World Bank policies between 1990 and 1999 was reduced economic growth and great income inequality (Espinoza, 2002, 2008; Bonal, 2004).

Tanzania

Noting that "inter/national structural adjustment policies rarely attend to local settings", an ethnographer described their impact on women and children in a rural village in Tanzania (Vavrus, 2005). Under the SAP, the government agreed to commercialize agriculture, and removed subsidies for fertilizer. At the same time, it reduced duties on food imports which resulted in competition with products from other countries. While food prices dropped so did sales of local production. Foreign investors introduced new technologies and workers from other countries created high unemployment. The GDP increased but so too did foreign debt and government spending on education. Youth unemployment increased, affecting women more than men (Buchmann, 1996).

Former Soviet republics

After the end of the Soviet Union in 1989, the IMF and World Bank offered structural adjustment loans and advice to former Soviet republics. All three of the Baltic states, Estonia, Latvia, and Lithuania had, with the collapse of the Soviet economy, suffered a severe economic shock, the worst in their recorded history. While in the Soviet Union they had enjoyed a relatively high standard of living, with high levels of employment, free education and access to health services. By 1992 unemployment had increased to 17%, and the life span of men reduced by 3 years. Once Lithuania joined the European Union, many young people migrated to the United Kingdom seeking to learn English. One commentator noted that "The more severe damage seems to have been inflicted on people's sense of security" (Harris, 1995).

Reports of the withdrawal of government funding from social services in recipient countries was, in 1997, lamented by the Director of the IMF and again in 2001 (reported in executive board minutes 95/55 and 00/121). But structural adjustment in the former Soviet nations had far less effect on education than in it did in Africa and Latin America. Under Soviet rule education had received given high priority; governments spent proportionately more on public education than any except those of the most advanced capitalist nations. Given their well-educated populations the former Soviet nations recovered from their economic shocks much more quickly than elsewhere.

Summary

Structural adjustment in the 1980s and 1990s worked well in some countries but had little effect in others. Reduced spending on education had disastrous effects in some countries. Reviewing 20 years of experience with structural adjustment in Africa, analysts concluded that by not paying attention to the effects of reduced government spending on the most vulnerable members of society it had been "an inadvertent enemy of human development" (Geo-Jaja and Mangum, 2001). Another suggested that repeated loans to some countries (30 in Argentina, 20 to Cote d'Ivoire and Ghana between 1980 and 1999) indicated the ineffectiveness of structural adjustment conditions (Easterly, 2005). A review of loans to 100 countries in the period 1970–2005 concluded that enrollments in primary education are increased by higher per capita aid. Level of government spending *per se* does not relate to expanded enrollments. Nor do estimates of institutional quality (Dreher et al., 2008). A review of IMF and World Bank loans in all sectors concluded that aid does work, sometimes, but that it often fails to work. The reviewer noted that:

> … For the IMF and … World Bank, ownership is understood as the process whereby recipient countries come round to accepting … [how they should change] the respective institution's programmes, policies, and approaches to development and poverty reduction.
>
> (Riddell, 2008, pp. 240–241).

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Critics of structural adjustment (and the World Bank's interventions) focused on the Banks failure to involve national and local actors in decisions about education. Several critiques noted the disjunction between those making decisions and those responsible for carrying them out. They complained that while the Bank acknowledges that conditions vary across countries and should be taken into account and calls for participatory planning, it then prescribes policies conceived in Washington that emphasize compliance with standards and the importance of surveillance. The Bank makes evidence-based decisions, but its data are its own or commissioned by it. The decisions made by Bank economists are different, in their assumptions and their data, than those of educators, especially educators in other cultures (Lauglo, 1996).

Although highly supportive of the IMF's support of developing country economies and a firm believer in the "colossal productive forces of capitalism", the then Deputy Secretary of Treasury of the United States recommended against transferring lessons learned in one country to another. Referring to the failures of structural adjustment, he noted

> … These are failures of extrapolation … if most now agree that macroeconomic reforms took precedence over microeconomic in the earlier steps of reform, and reducing the size of government took precedence over improving its quality, then it is fair to say that education and other basic social services were especially ill-served by these biases.
>
> (Summers, 1998, p. 3).

In 1998 the World Bank published its analysis of 220 programs involving adjustment loans (Dollar and Svensson, 1998). The conclusion reached by the Bank was that in 75% of all cases success or failure could have been predicted using a few political economy variables. The critical factors controlled by the Bank, including conditions, had no relationship with the outcome. What mattered was whether the country, its leaders and people, were committed to the reform. To improve its "success with adjustment lending, the World Bank must become more selective and do a better job of understanding which environments are promising for reform and which are not". The most promising environments were those that demonstrated a strong commitment to reform (Dollar and Svensson, 1998).

A former Bank staff member later wrote that the Bank had tended to be captured by single methodologies and an insistence on use of Bank-directed research to justify policy decisions. Policy decisions often were made before doing on-site research. "Global" solutions were applied until they were proven to work only in some settings. The former staff member concluded that more attention should be paid to local priorities (Heyneman, 2003). Another analyst concluded that the IMF should not impose conditions with its loans. Not only was imposition of conditions not included in the IMF statement of mission, but also it was counterproductive (Dreher, 2009).

2000—development decades five and six: structural adjustment in new clothes?

During this period SAPs were replaced with new procedures. Critics observed similarities between the arguments supporting the old and the new. This section discusses several of the new forms of intervention by the World Bank and the IMF, accompanied by the OECD.

Partnerships

In 1996 the Organization for Economic Cooperation and Development (OECD) had proposed that aid should be limited to poverty reduction and human development objectives. Their call for a partnership of donors and countries was seconded by several countries and eventually led to the formulation of the UN's Millennium Development Goals (Kayizzi-Mugerwa, 1998). The short-term effect was a reduction in aid from OECD countries. The amounts of grants from donor countries declined from 5.5 billion dollars in 1990 to 1.8 billion in 1997 (Banya and Elu, 2001). This increased developing country dependence on the IMF and the Bank.

Anticipating the new millennium, the IMF and Bank began to describe themselves not as single actors but as partners with other international agencies committed to assisting the nations of the world. In 2002 the Bank became a member of the Global Partnership for Education (GPE), a non-governmental organization to carry out the United Nations' Education for All Fast Action strategy (https://www.globalpartnership.org/). By explicitly committing to the self-government (sovereignty) of states receiving aid, the Bank could, it was argued, increase its influence not by domination or imposition, but by encouraging participants to accept self-discipline (Abrahamsen, 2004). The Bank eventually provided about 75% of the funds distributed through the GPE. Technical assistance and grants were made to needy countries on the basis of recommendations by external consultants who did Education Sector Plan appraisals. The IMF also joined, asserting that its lending to a country encouraged donors to increase their support for social spending in that country (Clements et al., 2013).

The recommendations made to recipient countries were similar to those that appeared in structural adjustment programs. The construct of partnership was not well-defined, prompting several questions. The proposal called for contracts between (lending and receiving) partners: critics asked whether contractual agreements were not the same as conditions (Maxwell and Riddell, 1998). After all, countries might define their own priorities but they had to be acceptable to the lending partners. What would be the effect of unequal relationships of power among partners (Bailey and Dolan, 2011)? Other critics observed that the World Bank would control the dominant portion of all resources in the partnerships proposed (Menashy, 2018; Menashy and Shields, 2017).

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The formation of the GPE had little effect on relationships with recipient countries. One commentator observed that the World Bank was operating with the same ideology expressed in Rostow's (1960) theory of stages of development. By classifying countries according to their stage of development, the Bank located countries on a common path of progress or modernization. In order to develop, they must follow in the footsteps of the more "advanced" capitalist countries (Klees, 2002).

Poverty reduction strategy papers

To highlight their focus on poverty reduction, the IMF and World Bank in 1999 initiated a process of preparing Policy Reduction Strategy Papers. The process was meant to engage representatives of the civil society in dialog about policy formulation, in order to "help poor countries and their development partners strengthen the impact of their common efforts on poverty reduction" (World Bank, 2000). Although this was seen as a radical shift of objectives, it maintained a relationship of imposition of the Bank's conditions (Pender, 2001). The process to achieve globalization by transforming informal into formal institutions would, it was argued, displace social norms and rules of conduct with legally binding rules (Craig and Porter, 2002). The IMF and the Bank claimed the poverty reduction approach was new, others saw it as nothing more than window dressing for the same old structural adjustment approach that had pushed so many countries further into poverty (Joy et al., 2003).

Between 2000 (the first Poverty Reduction Strategy Paper) and 2006 the specification of how to achieve development went through four different iterations. Initially, the prescribed actions conformed to the original Washington Consensus which called for deregulation and privatization. A second approach, a post-Washington Consensus, put more emphasis on building quality institutions and safety nets. The New York Consensus emphasized economic growth, aid and governance. The fourth approach, the Social Protection Agenda (SPA), aimed specifically at reduction of poverty and vulnerability. Emphasis on the SPA increased as a result of the 2008 crisis. The Washington Consensus was no longer the Bank's development agenda (Elkins et al., 2018, p. 4).

Viewed almost twenty years later, the emphasis on poverty reduction appeared to have been successful. Using longitudinal data from 123 countries, researchers found a positive rate of economic growth, a significant reduction in poverty and in infant mortality, and positive progress toward realization of universal primary education and gender parity (Elkins et al., 2018).

The knowledge society

As another shift in emphasis, at the turn of the century in 2002 the World Bank announced its dedication to building "knowledge societies". This would be accomplished by providing increased support for tertiary education, which the Bank identified as a major factor in the production and dissemination of knowledge. Global partnerships would provide access to knowledge about "innovation systems" that would move countries along the path to development (World Bank, 2002).

The announcement was cheered by many, as a radical shift from earlier policies that had, by emphasizing primary education, wreaked drastic harm on higher education in developing countries (Obamba, 2013). Between 1960 and 2000 the Bank twice reversed its course. Initially the Bank had espoused human capital theory which assigned more value to higher education. When research showed that economic rates of return to primary schooling were higher than those to higher (Psacharopoulos, 1973, 1980), support for universities was reduced. Drastic consequences for hapless recipient countries followed from these changes (Samoff and Carrol, 2004; Obamba, 2013).

By 1998 new "knowledge" prompted another reversal, re-defining universities as critical actors in the economic development process. Following Bank recommendations, higher education spending sub-Saharan Africa was set at 22% of government expenditure on education, even though only 2% of the student population would benefit (Banya and Elu, 2001). The Bank called for construction of systems of learning, including lifelong learning, with universities as the major source of knowledge (World Bank, 2002). It announced that only by producing, adopting, adapting, disseminating and commercializing knowledge could a country compete economically and improve the general welfare (Obamba, 2013, p. 97). The university would become the primary means by which Africa (and other regions) could take their place in the global economy. Meanwhile, Africa had not yet achieved universal primary education and less than half its adult population was literate (Watkins, 2013). Some viewed the premises and promises of higher education development initiatives with suspicion (Molla and Cuthbert, 2018).

The term "knowledge" was not defined in the Bank's report, nor did the document provide illustrative examples. A distinction was made between technical knowledge and knowledge about attributes, but issues of validity and reliability of knowledge were not discussed. Referring to itself as a "knowledge bank" the Bank's argument drew (principally) on its own research and analysis of "knowledge economies", to highlight how (institutional) science and technology contribute to development (World Bank, 2002).

By 2015 the Bank was one of the world's leading producers of education research. Most of the research cited to justify Bank proposals and conditions was produced by Bank employees or contractors, or cited other authors linked to the Bank (Zapp, 2016). The IMF's and Bank's "authority" in negotiations with loan-seeking countries also rested on their command of the technologies used to assemble and present financial and educational data. Both institutions were skilled in use of accounting procedures that encouraged loan recipients to exercise "self-discipline" in conforming to loan conditions (Neu et al., 2006, 2010).

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The report stated that support for tertiary institutions was necessary to assist them to adapt to changes in internal and international market forces. Low rates of economic growth in recipient countries were attributed (in part) to their lack of knowledge.[8] If a country (re)built its own knowledge-producing institutions, international trade regimes and foreign investments would generate employment (Mehta, 2001).

In this new perspective, universities were seen as key agents in the construction of the knowledge society, and hence drivers in the (global) knowledge economy. Success in the fulfillment of the mission of the university, at one time a disinterested search for truth, would be assessed in terms of its contribution to research and economic productivity, and scores on quality assurance measures. Both universities and the economy would benefit, it was argued, from closer links with industry and commerce (Olssen and Peters, 2005).

Results-based lending

The shift in orientation of the World Bank was accompanied by an increased emphasis on the importance of measurement of the outcomes of national education systems (Baker and LeTendre, 2005; Kamens and McNeely, 2010). Interest in comparing the learning outcomes of different countries may have been a product of the Cold War. The Soviet Union's success with Sputnik had focused the Western Alliance's attention on education and it relationship with innovations in technology. National assessment of education systems quickly followed (Purves, 1987; Tröhler, 2013).

Originally, the International Association for the Evaluation of Educational Achievement (IEA) was a collaborative project to identify common principles that explain the performance of the educational systems in economically advanced countries (Husén and Postlethwaite, 1996). The test they developed measured students' knowledge of the national curriculum.[9] What started as a scholarly enterprise, however, soon took on a different aspect. National comparisons on academic achievement were associated with measures of economic performance. Politicians and citizens in lower-scoring countries sought to improve their economies by imitating practices in those wealthier countries scoring more highly in academic achievement.

Among the tests that followed was that produced as part of the Program for International Student Achievement (PISA). This test was developed by the Organization for Economic Cooperation and Development (OECD), which works closely with the IMF and the World Bank. Originally PISA was offered as a service to OECD member countries seeking to evaluate student achievement. Currently it is used, together with an instrument that assesses the effects of teaching practices (TALIS), to assess teacher and system accountability.

Unlike the tests of the IEA, however, PISA is not a measure of school-based knowledge. Instead, it purports to measure the life skills and knowledge of youth who are 15 and 16 years old. OECD assertions about the validity of the PISA and the TALIS instruments are based on the association between their scores and measures of national development, such as GNP. Neither of the tests meets conventional standards of either construct validity (does the test measure what it claims to measure?) or predictive validity (do scores correlate with some independent event or measure?) (Araujo et al., 2017; Berliner, 2020; Hanberger, 2014; Komatsu and Rappleye, 2017; Pepper, 2020; Zhao, 2020).

By associating PISA scores with levels of "development" and the global economy, OECD presented PISA as capable of valid measurement of the quality of an education system, arguing that by comparison of one country's students' "knowledge and real-world problem-solving skills" it is possible to determine the system's effectiveness in contributing to economic growth. Teaching should be assessed in terms of knowledge (test scores) rather than learning ability or creativity (Smith, 2014).

Critical discourse analysis of published documents demonstrates how OECD uses test-based "knowledge" to shape the education policies of participating countries.

> … OECD (a) uses a discourse of fear to market teacher quality in light of global changes, implicitly framing [low-scoring] teachers as "bad teachers"; (b) advocates reliance on the organization as a protector and (c) promises a remedy by regulating teachers in the name of effectiveness and the knowledge economy.
>
> (Berkovich and Benoliel, 2020).

PISA was applied initially in high income countries, but then came to be used by the World Bank to assess loan applications from poor countries. The "effect" of PISA on education in recipient countries has been described as one of "governing by numbers" (Grek, 2009). As more countries were invited to join OECD, PISA has come to be described as a "global governing complex" for education (Ydesen, 2019).

With the competition eliminated, by 2013 the OECD had constructed a system of "global educational governance". PISA was central to imposing an "audit culture" which served to decontextualize schooling, bringing participants into the world culture (Meyer and Benavot, 2013). Although not experimentally verified, OECD recommendations of effective practices based on use of PISA are given high credence.

[8]In part, this "lack" was the result of prior investment in higher education. University graduates in Africa migrated to employment in more advanced economies.

[9]That is, the IEA tests, like those that followed, measured a student's current knowledge, not necessarily learned in school.

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Observers see a "Global Education Industry" working in all stages of policymaking, emphasizing the "best global practices". In effect, the generation of policy options is today frequently outsourced to the private sector (Mohamed and Morris, 2021). In some instances, the policy agenda of OECD supplants national priorities of recipient countries (Auld et al., 2018).

It does seem that PISA has contributed to persuading countries to align their education systems with those of the more prosperous countries. Once a relatively small organization (less than 40 countries), OECD now has 100 members with more asking to join and willing to conform to OECD's educational policy mandates. Structural adjustment, guided by the IMF, World Bank, OECD and others continues today (Addey and Gorur, 2020; Meyer and Benavot, 2013; Pons, 2017; Ydesen, 2019).

Summary: twenty-first century observations on structural adjustment in education

The concept of a "knowledge economy" appears to have displaced "world culture" as the justificatory framework for "recommendations" to recipient countries by the IMF, World Bank and OECD. Much more emphasis now is placed on research to justify selection among policy choices based on evidence or results. In most instances, however, the evidence provided is not from the country receiving the loan but rather from another in which a given policy has proved to be effective. To the extent that "recommendations" function as conditions, the framework is normative.

The IMF and World Bank, after 50 years of immersion in national economies, believe that its fund of economic knowledge should be applied uniformly to all. The OECD with 100 or more members whose economies account for perhaps 90% of the global GNP (but a smaller proportion of the world's population), shares this confidence. The poor countries of the world stand outside the board room; inside others plan policies that will involve radical changes in the values and cultures of those left out. Given past experience, the policies proposed by the OECD, World Bank and IMF are likely to fail to reach their objectives.

World culture theory initially acknowledged differences across cultures, but the path taken by globalization is believed by some to have removed those differences as an obstacle. By the late 90s some came to believe that development had reached the peak which is "the end of history (Fukuyama, 1992). Other claimed that differences between cultures and countries have disappeared to the point that global understanding flows easily across the globe; the world is now "flat" (Friedman, 2006).

Today, however, those pronouncements seem less credible. Our political and economic world appears not flat, but rather "spiky" (Feiock et al., 2008). Whether in consideration of geography, climate, economy, culture, population, language or religion, the regions, countries and communities of the world seek and find much on what to differ. Nations vary in the objectives knowledge, skills, beliefs and values of those who live in them, as well as in the policies that can be implemented, and their beliefs as to which will be effective. Over time they may have become similar in some ways, but at the same time they have developed unique and often contradictory features. The acquisition of knowledge has become a source of continuing change in beliefs, values, skills, actions.

The apparent convergence of national education systems assumes acceptance of uniform global policies, but the reality of countries is highly diverse. As a consequence, one reason for the failure of structural adjustment programs is they are not implemented as intended. In Mongolia, following the Soviet collapse, a structural adjustment loan included a condition of decentralization of education. Over a 10-year period the Ministry of Education shifted back and forth, decentralizing then recentralizing. After close up study researchers concluded that the cultural legacy of socialism collided with the culture of the international lenders (Steiner-Khamsi and Stolpe, 2004, 2006). Loan implementation would be more probable if conditions were determined after conducting an analysis of conditions and priorities in the recipient country, rather than relying on normative "best practices" (Steiner-Khamsi, 2016).

Some may attribute non-implementation to incompetence, but more likely failure results from political resistance. A study of SALs and SAPs in 90 countries between 1980 and 2005 concluded that the most common explanation for non-implementation was refusal by democratically elected officials to comply with imposed conditions. Resistance was explained either by their own conclusions about likely results, or because of political opposition (Henisz and Mansfield, 2019).

Lack of attention to the political economy of lending has also threatened the ability of the Global Partners to agree on strategies and specific policies. The effectiveness of the GPE depends in part on its ability to appear before recipient countries as a cohesive, consensual partnership of countries representing diverse positions. Internally, however, the GPE is plagued with disagreements among partners about key principles. The partners themselves hold different political philosophies and cultural values, with the consequence that the GPE itself is "a venue for serious contestation" (Knutsson and Lindberg, 2017, 2019, 2020).

From this perspective, the normative theory of "world culture" and a global economy is destined for failure in its quest to bring all countries to a comparable level of development. Taking the political into account will require a different understanding of what can be achieved through globalization. Rather than thinking of a global society, we should work toward a global system of societies in which the participation of unique participants generates synergy. Cooperating societies, each contributing unique knowledge derived from unique experiences, can develop education systems that not only expand knowledge, but also our awareness of its unlimited possibilities.

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