

**DOSSIER**

*Quality, learning and systemic assessment: discourses from international organizations for Latin American countries*

**The World Bank's Human Capital Project for Latin America and the Caribbean: Learning and Educational evaluation*****O projeto de capital humano do Banco Mundial para a América Latina e o Caribe: aprendizagem e avaliação educacional***

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**ABSTRACT**

This article analyzes the World Bank's guidelines for the reproduction of human capital in Latin America and the Caribbean, with regard to the educational dimensions of learning and assessment, in the context of the health crisis of the COVID-19 pandemic, answering the following question: How are the World Bank's guidelines for Latin America and the Caribbean configured in terms of its human capital project, with regard to the educational dimensions of learning and assessment, in the period of the health crisis of the COVID-19 pandemic? This is documentary research, focusing on World Bank documents from 2020 to 2023, and bibliographical research, in which we sought to interlocute with the excerpts that address the categories of human capital, learning and educational assessment. As a result of the study, it is confirmed that the World Bank's Human Capital Project is inserted in the context of economic reforms and neoliberal policies, under the argument of promoting economic growth, sustainable and inclusive development, reducing poverty rates and learning, which makes the educational dimensions of learning and assessment central to the formation and preservation of human capital, as well as measuring the impacts of the COVID-19 pandemic on the formation of this human capital.

**Keywords:** Human Capital and COVID-19. Learning. Educational evaluation.

**RESUMO**

Este artigo tem por finalidade analisar as orientações do Banco Mundial para reprodução do capital humano na América Latina e no Caribe, no que diz respeito às dimensões educacionais de aprendizagem e de avaliação no contexto da crise sanitária da pandemia da covid-19, respondendo à seguinte problemática: Como se configuram as orientações Banco Mundial para a América Latina e o Caribe quanto ao seu projeto de capital humano, no que se refere às dimensões educacionais de aprendizagem e de avaliação no período da crise

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sanitária da pandemia da covid-19? Trata-se de uma pesquisa documental, com foco nos documentos do Banco Mundial, no período de 2020 a 2023, e de uma pesquisa bibliográfica, em que se buscou a interlocução com os excertos que abordam as categorias de capital humano, de aprendizagem e de avaliação educacional. Como resultado do estudo, confirma-se que o Projeto de Capital Humano do Banco Mundial está inserido no contexto das reformas econômicas e políticas neoliberais, sob o argumento de promoção do crescimento econômico, do desenvolvimento sustentável e inclusivo, de redução das taxas de pobreza e de aprendizagem, o que torna central as dimensões educacionais de aprendizagem e de avaliação para a formação e a preservação de capital humano, assim como para mensuração dos impactos da pandemia da covid-19 na formação desse capital humano.

*Palavras-chave:* Capital Humano. Covid-19. Pobreza de Aprendizagem. Avaliação Educacional.

## Introduction

The granting of loans and the indebtedness of nations, especially peripheral capitalist countries, are the driving forces behind the World Bank<sup>1</sup>. In addition to immediate financial issues, this institution has developed projects that include the educational dimensions of learning and assessment, intending to interfere with countries' public policies.

The World Bank interference in education policies can be seen, for example, in the document commissioned by Brazil, *A Fair Adjustment: analysis of the efficiency and equity of public spending in Brazil* (2017). From the set of guidelines contained in this document, we highlight the guidelines for expanding the public-private partnership; the curricular reforms for Basic Education, such as the National Common Curricular Base (BNCC); the reform of Secondary Education; the reform of teachers' careers, through the implementation of merit-based salaries (World Bank, 2017); and other aspects highlighted by the document.

The alignment of educational reforms with World Bank guidelines also corresponds to the interests of Brazilian ruling groups, so it is not an absolute imposition, since there are concessions and interests of these groups, such as the Brazilian business community, in adhering to the educational perspectives propounded by the World Bank, such as the idea of human capital.

In this research<sup>2</sup>, we analyze the World Bank Human Capital Project, focusing on the educational dimensions of learning and assessment. This project envisages, interferes with, and

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<sup>1</sup> The World Bank Group is a group of five financial institutions: "The International Bank for Reconstruction and Development (IBRD) provides loans to governments of middle-income countries and creditworthy low-income countries. The International Development Association (IDA) provides financing on highly concessional terms to the governments of the poorest countries. International Finance Corporation (IFC) provides loans, capital and advisory services to encourage private sector investment in developing countries. Multilateral Investment Guarantee Agency (MIGA) provides political risk insurance and credit enhancement for investors and lenders to facilitate foreign direct investment in emerging economies. International Center for Settlement of Investment Disputes (ICSID) offers international mechanisms for conciliation and arbitration of investment disputes" (World Bank, 2020, p. 12).

<sup>2</sup> This article is the result of studies carried out in the research project *Trajectories from the global to the local in educational evaluation policies in Latin America: an international network study*, coordinated by Prof. Dr. Fabiano Antonio dos Santos, from the Federal University of Mato Grosso do Sul (UFMS). The project includes the following co-executing institutions: the University of Chile - Chile; the State University of Western Paraná (Unioeste) - Brazil; the Federal University of Grande Dourados (UFGD) - Brazil; the Universidad Distrital Francisco Jose de Caldas - Colombia; the Centro de Investigación y Estudios Superiores en Antropología Social (Ciesas) - Mexico; the University of Buenos

develops specific actions in 95 countries, according to macro-regions of the world, classified by the World Bank as follows: Africa, East Asia and the Pacific, Europe and Central Asia, Latin America and the Caribbean, Middle East and North Africa and South Asia. From these geographical regions, we highlight aspects of the Human Capital Project in the context of Latin America and the Caribbean, from 2020 to 2023, corresponding to the moment of the health crisis of the COVID-19 pandemic.

The aim of this article is therefore to analyze the World Bank guidelines for the reproduction of human capital in Latin America and the Caribbean, concerning the educational dimensions of learning and assessment in the context of the health crisis of the COVID-19 pandemic. The problem is as follows: *How do the World Bank's guidelines for Latin America and the Caribbean shape its human capital project, about the educational dimensions of learning and assessment during the Covid-19 pandemic health crisis?*

To this end, we used a qualitative approach focused on documentary and bibliographical research. The documentary research considered the World Bank annual reports that formed the empirical basis of our study, based on the following primary sources: *Annual Report 2020: Supporting Countries in unprecedented times* (World Bank, 2020); *Annual Report 2021: from crisis to Green, resilient and inclusive recovery* (World Bank, 2021); *Acting Now to Protect the Human Capital of Our Children Report* (World Bank Group, 2021); *2022 Annual Report: supporting countries in adapting to a volatile world* (World Bank, 2022); and *Executive Summary of the document Collapse and recovery: how the covid-19 pandemic eroded human capital and what to do about it* (World Bank Group, 2023).

The main secondary sources that made up the bibliographic research were selected with a view to the themes of learning and educational assessment, as well as the process of educational reforms that began in the 1990s. We searched the Scientific Electronic Library Online (SciELO) database and the journals and Theses and Dissertations database of the Coordination for the Improvement of Higher Education Personnel Foundation (CAPES), using the descriptors: "State and its managerial, neoliberal, and ultra-neoliberal variations"; "World Bank and education"; "global agenda for education"; "educational assessment, learning, and human capital".

From the set of references located, due to their proximity to the problem dealt with in this text, we selected the following: Behring, Cislighi, and Souza (2020); Bottomore, Harris and Kiernan (2001); Deitos (2005); Freire and Cortez (2020); Gonçalves, Guerra and Deitos (2020); Guerra *et al.* (2022); Gonçalves *et al.* (2022); Iijima (2021); Leher, Vittoria and Motta (2017); Moraes, (2021); Shiroma, Campos and Garcia (2005); Soares (2002); and Zanardini (2008).

The methodology used to process the primary sources was based on Strauss and Corbin's Grounded Theory (2008), which includes open, axial, and selective coding. The identification of selective coding refers to the terms searched for in the documents using the Ctrl+f tool to locate the passages that refer to the research categories: human capital, learning, and educational assessment.

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Aires and the Universidad Nacional del Comahue - Argentina; and the State University of Mato Grosso do Sul (UEMS) - Brazil. In addition, it was formed from a network of researchers in educational evaluation in Latin America: the Red Latinoamericana de Investigación en Evaluación (Relieva), created in 2016 in the city of Santiago, Chile, with the aim of systematizing analyses of external evaluation proposals currently promoted in Latin American countries, and proposing alternative evaluation perspectives and strategies.

Next, we defined axial coding, an essential element resulting from the excerpt that appears in the selective coding of the categories analyzed; finally, we arrived at open coding, which presents various components that help to explain the categories, also referred to here as selective coding.

Grounded Theory (Strauss; Corbin, 2008) underpinned the research for the project *Trajectories from the Global to the Local in Educational Assessment Policies in Latin America: An International Network Study*. In general, the research used Grounded Theory to gather data from the documentary corpus, by identifying open, axial, and selective coding. Based on these general methodological guidelines, which comprise the research database, the researchers treated and analyzed the data according to the theoretical perspectives they assumed in their studies. In this article, based on Shiroma, Campos, and Garcia (2005), we consider the documents in their intertextuality, that is, in the relationship they establish with themselves and with the practice they intend to guide. Based on these guidelines, we identified the excerpts from the documents that refer to the three categories, organized the data in tables, and produced the analysis presented in this manuscript.

The article is structured in three sections. The first section, entitled *Neoliberalism in Latin America and the World Bank's Human Capital Project*, aims to characterize the World Bank Human Capital Project, particularly its developments in Latin America and the Caribbean. The second section, entitled *Learning and Human Formation for the World Bank*, aims to discuss the World Bank perspective on the effects of COVID-19 on learning. The third section - *Evaluation as a control mechanism for the World Bank* - contextualizes the evaluation practice proposed by the World Bank for peripheral countries, related not only to learning but also to educational evaluation related to accountability policies. Finally, we present some considerations and the main results of our research, including the educational dimensions of learning and assessment that shape the World Bank Human Capital Project in the context of Latin America and the Caribbean, during the health crisis caused by the COVID-19 pandemic.

## **Neoliberalism in Latin America and the World Bank's Human Capital Project**

In analyzing the World Bank's Human Capital Project for Latin America, we consider the capitalist system and its inseparable premise of work-education. This is the essence of the Human Capital Theory<sup>3</sup>. This perspective disseminates "[...] mercantile and competitive logic with the aim of maintaining the necessary consent of individuals, as well as subordinating them to constant human adaptation to socio-economic ends" (Gonçalves *et al.*, 2022, p. 33).

The political conditionalities and economic reforms with a neoliberal dimension stem from the process of renegotiating countries' foreign debts. At the beginning of the 1980s, considered the decade of the debt crisis, due to its deepening at the international level and particularly in the peripheral and indebted countries, the financial and social worsening was disastrous. The process of structural adjustment led to maladjustment in all aspects of economic, political, and social life, increasing poverty (Deitos, 2005).

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<sup>3</sup> Originating in the USA, its main exponent was Theodore Schultz (1902-1998), who sought to explain the economic growth of countries through educational investments made in the human component of production.

It was at the end of the 1980s, and especially at the beginning of the 1990s, that most Latin American and Caribbean countries began or advanced in their adjustments and reforms. However, “[...] strictly speaking, the first major neoliberal ‘adjustment’ experiments were tried out in Latin America” (Moraes, 2021, p. 16).

It is therefore essential to emphasize that the diversity in the economic, political, and social consequences between Latin American countries depended fundamentally on aspects such as:

[...] the period of implementation: differences in the international conjuncture and within the countries themselves in the 1980s and 1990s [...]; the type and intensity of the adjustment policies [...]; the structuring of the economy [...]; the structuring of the state [...]; the previous structuring of public policies [...]; and the differences relating to the social conditions found in each specific situation [...] (Soares, 2002, p. 31-32).

The reforms of the State and Basic Education, which are still underway, reflect the global movement and are linked to the guidelines advocated by International Organizations, including the World Bank, which, from the 1990s onwards, aimed at “[...] homogenizing the world via education, based on a common political agenda” (Zanardini, 2008, p. 20), called by Dale (2004) the Globally Structured Agenda for Education (GSEA).

It is from the socio-economic and political context of the 1990s that the neoliberal reforms of the state and education in Brazil were unleashed, and the relationship between the educational dimensions of learning and educational assessment in the context of educational policies can thus be glimpsed.

At the international level, since the 1990s, these dimensions have become central to the context of educational policies in Latin American countries and are the foundations of the World Bank Human Capital Project for Latin America and the Caribbean. In its documents, published during the health crisis of the COVID-19 pandemic, educational assessment and learning are related to the notion of learning poverty, as we analyze in this text.

In Latin American countries, educational assessment has taken on a prominent role in education policies, due to the development of large-scale assessment systems aimed at verifying student learning. These are policies that, among other things, link social control to education and schools.

These aspects of educational policies are related to the process of training/conforming individuals to the ongoing neoliberal societal project, through the acquisition of socio-emotional competencies, conceived by International Organizations and, consequently, sustained as a formative principle of human capital (Gonçalves; Guerra; Deitos, 2020).

The dimensions of educational assessment and learning have intensified in the context of the COVID-19 pandemic, as the World Bank is concerned about the future of workforce training in peripheral countries and attaches importance to the need to protect human capital. This is conceived beyond the health and knowledge conditions of the worker, as it also presupposes “[...] the capacities, qualifications, and resilience that people accumulate throughout their lives [...]” (World Bank, 2020, p. 49) to “[...] reach their potential [...]” (World Bank, 2021, p. 58).

The World Bank argues that the Human Capital Project encompasses the relationship between the growth of a well-nourished child, intending to achieve real learning at school, and reaching the job market as a healthy, qualified, and productive adult:

The Human Capital Project (HCP) works across sectors to improve outcomes so that every child grows up well-nourished and ready to learn, achieves real learning at school, and enters the job market as a healthy, skilled, and productive adult. [...] People with good health and nutrition, education, savings, and safety nets can better withstand shocks (World Bank, 2021, p. 58).

This notion of human capital therefore refers to a relationship of protecting the basic conditions for survival, especially since these conditions are not attainable by the majority of the population through employment, remuneration, and basic economic conditions. For this reason, the World Bank created a project to alleviate the effects of poverty resulting from the contradictions of capital, as a strategy to protect the workforce, which “[...] is the capacity to perform useful work that increases the value of commodities. It is their labor power that workers sell to capitalists in exchange for a cash wage” (Bottomore, Harris and Kiernan, 2001, p. 156).

The World Bank Human Capital Project is based on three pillars: the first focuses on economic issues, such as increasing productivity and competitiveness for indigenous peoples, Afro-descendants, and rural communities, presupposing private investment; the second focuses on preparing human capital for the demands of work; the third aims to increase resilience so that countries know how to manage and resist shocks resulting from natural disasters, economic crises, violence, infectious diseases and other problems that plague countries and their populations (World Bank, 2020).

The Human Capital Project, therefore, based on these three axes, directs specific actions, transformed into public policies by the countries that take out its loans. With this, the World Bank accumulates wealth through interest, dictates guidelines, and monitors the implementation of the workforce training project, and human capital.

In Latin America and the Caribbean, this project and its pillars, mentioned in the 2020 Annual Report, correspond to supporting countries in unprecedented times (World Bank, 2020), are associated with work, and are called inclusive growth, investment in human capital, and resilience. The first pillar, focusing on inclusive growth, aims to “[...] promote inclusive economic and social growth by increasing productivity, fostering accountability, and creating opportunities” (World Bank, 2020, p. 30). The second pillar, investment in human capital, seeks to “[...] ensure that everyone has access to the health and education they need to thrive and seize the opportunities provided by inclusive growth and a rapidly evolving labor market” (World Bank, 2020, p. 31). The third pillar, in turn, deal with increasing resilience so that “[...] countries can not only better manage shocks, such as natural disasters, economic upheavals, migration, crime and violence, and infectious diseases, but also resist them” (World Bank, 2020, p. 30). Following the example of the COVID-19 pandemic, the need to increase resistance to future pandemics and health crises is highlighted (World Bank, 2020).

In this way, we can see that the Human Capital Project brings together economic possibilities for survival, health, education, and emotional and psychological issues, by defending resilience as the ability of countries to face the adversities often generated by the capitalist economic system,



such as natural disasters, economic and health crises. We can see that the Human Capital Project, therefore, covers everything from individual issues to the collective responsibility of citizens who do not know how to manage “shocks”, as happened with the pandemic.

During the pandemic, the Human Capital Project was threatened, and the World Bank associated the idea of new loans for Latin American and Caribbean countries with the idea of protection based on these arguments:

We aim to protect the gains made during the region's profound social transformation in the first decade of the 21st century when the commodities boom and widespread growth halved poverty rates. Between 2003 and 2016, the proportion of the population living in extreme poverty fell from 24.5% to 9.9%. Since then, however, the economic outlook has lost its luster, and many people are at risk of falling back into poverty. These risks are being further exacerbated by the pandemic (World Bank, 2020, p. 30).

The commodity economy, which has intensified the exploitation of labor in Latin American and Caribbean countries, is identified by the World Bank (2000) as a “profound social transformation”, because of the worsening of the capital crisis, such as the one experienced worldwide in 2008, the World Bank, without mentioning it, justifies the possibility of a return to poverty, because economic prospects have “lost their luster” and have worsened in the pandemic.

Looking at Latin American countries, Leher, Vittoria, and Motta (2017) identify a set of variables organized into four axes that generate a “political storm”. One of these axes concerns the commodity economy:

The objective factor of the deepening capitalist crisis evidenced in the US in 2008 affected the economic foundations of the so-called neo-developmentalism that sustained part of the ‘progress’ governments: Brazil, Argentina, and Venezuela, above all. In this context of crisis, there was a strong resizing of the Chinese economy, combining a relative reduction in the expansion of consumption of raw materials and greater autonomy concerning various natural resources. These facts contributed to the fall in commodity prices from 2010 onwards (Leher; Vittoria; Motta, 2017, p. 15).

Economic facts such as those mentioned by the authors show, from a critical perspective, what the World Bank calls “losing the shine”. The return to poverty mentioned by the World Bank has to do with the worsening of the capital's genuine economic crisis, which is accentuated in peripheral countries like Brazil, especially at a time of health crisis. For the authors,

Unlike the central countries, the rise of commodities occurred in dependent capitalist countries without a service sector that was intensive in scientific, technological, and artistic knowledge. However, it did allow for a short period of implementation of public policies aimed at improving income and work for workers at the bottom of the pyramid, until the crisis deepened (Leher; Vittoria; Motta, 2017, p. 15-16).

In the peripheral countries, in the recent period called neo-developmentalism, through commodities, we observed that social policies were focused and their momentary expansion, at the time of the pandemic, proved to be insufficient to meet the demands of the population, such as income redistribution, health and education. However, the World Bank announced the contraction

of new debts to remedy basic survival issues for the population (2020, 2021, 2022), which offered resources to protect the economy and human capital of Latin America and the Caribbean.

In numerical terms, in the 2020 financial year, the WB granted Latin America and the Caribbean loans of 7.8 billion dollars. In 2021, the amount was US\$ 19.7 billion, and in 2022 US\$ 21 billion, totaling US\$ 48.5 billion in loans contracted by Latin American and Caribbean countries in these three years to meet the demands arising from the pandemic, especially in terms of health, education and the economy, such as Bolsa Família in Brazil. Thus, the so-called protection of human capital has come at the cost of increasing the indebtedness of peripheral countries.

Concerns about human capital formation and the learning crisis in Latin American and Caribbean countries have been announced by the World Bank in various documents. Regarding this learning crisis, the report *Acting Now to Protect the Human Capital of Our Children* (World Bank Group, 2021) points out that

While LAC countries had made some progress in human capital outcomes over the last decades, the region was already experiencing a learning crisis before COVID-19 hit the region in full force at the beginning of 2020, with staggering consequences on education and human capital outcomes. The learning crisis was evident through a combination of low average quality of learning and inequitable outcomes across education systems. As we take stock of the almost twelve months since the outbreak which led to the massive closure of school systems across the region, it is now clear that this situation may jeopardize the aforementioned human capital gains and, most importantly, exacerbate the loss in human capital accumulation of millions of children and impact future productivity levels. In terms of education and learning, even with the tremendous efforts made under an exceptional situation, it is also clear by now that mitigation strategies will only be able to compensate, at best, for a fraction of learning losses during this period (World Bank Group, 2021, p. 77).

Regarding the learning crisis, Guerra *et al.* (2022) point out that, from the World Bank perspective, this crisis is not related to the social economic structure, but is due to two aspects. Firstly, it is the incompetence of teachers and, secondly, the inability of students to learn. For the WB, the crisis can be seen in the low academic performance of students in international assessments.

Based on the documents analyzed in this study, we note that there is a constant concern on the part of the World Bank to ensure a healthy and exploitable workforce in Latin American and Caribbean countries, especially in the face of the impacts of the pandemic, which, according to the World Bank, show “[...] lower levels of learning and employment are likely to reduce future earnings, while high levels of debt may overburden the financial sector and slow recovery” (World Bank, 2021, p. 39).

The so-called learning crisis and large-scale assessment have become central issues in the formation and preservation of so-called human capital, as well as measuring the impacts of the COVID-19 pandemic. According to the World Bank,

[...] School-age children have lost up to a year and a half of education, which should result in a 12% loss in lifetime earnings. Employment levels have only partially recovered, and economic growth continues to face serious challenges (World Bank, 2022, p. 34).



Thus, when we consider the second pillar of the Human Capital Project, the “preparation of human capital for the demands of work”, we identify the educational dimensions of learning and assessment as fundamental elements of human formation from the World Bank perspective, as we discuss in the following sections.

## Learning and Human Formation for the World Bank

The World Bank points to the existence of a learning crisis, diagnosed mainly by the low academic performance of students in international assessments. According to this international organization, this implies losses in the training/protection of human capital, especially in the context of the COVID-19 pandemic. The challenges for the formation/protection of human capital are not only related to people's loss of learning but also to economic growth and poverty reduction.

In this sense, investment in human capital includes raising people's potential, making them productive members of society and understood as a

*[...] a fundamental driver of economic growth, poverty reduction, and shared prosperity. Countries that invest efficiently and equitably in building, protecting, and mobilizing human capital will be better prepared to compete in a global economy that rewards higher-level cognitive skills (World Bank, 2020, p. 49, emphasis added).*

The World Bank therefore proposes adjustments to the education system, including the curriculum, teacher training, the educational assessment system, funding, and other policies. These adjustments “[...] once justified by the population's low access to school, are now justified by the learning crisis of those who attend.” (Guerra *et al.*, 2022, p. 603), or even through the recently coined term “learning poverty”.

In the *2020 Annual Report: Supporting Countries in unprecedented times* (World Bank, 2020), a new concept was presented by the World Bank Group at the United Nations (UN) General Assembly in September 2019, that of learning poverty, and it was announced at the 2019 Annual Meetings that one of the new global targets would be to reduce the learning poverty rate by at least half by 2030:

At the UN General Assembly in September 2019, the World Bank Group presented a new concept, learning poverty, which we developed in close collaboration with the UNESCO Institute for Statistics. We found that the learning poverty rate in low- and middle-income countries was 53%, meaning that more than half of all 10-year-olds could not read and understand a simple story. To galvanize action towards the education goals and tackle this crisis, we launched a new global target at the 2019 Annual Meetings to at least halve the learning poverty rate by 2030 (World Bank, 2020, p. 51).

In partnership with the United Nations Educational, Scientific and Cultural Organization (UNESCO), the World Bank developed an index to measure learning poverty, thereby creating an analogy with economic indicators that quantify social poverty, as if the so-called learning poverty were an educational phenomenon, compared to the economic conditions of the subjects.

Under the discourse of combating poverty and protecting human capital, the World Bank intensifies the blaming of the subjects involved in the educational process, classifying those who are

learning as poor. In addition to the call for education to alleviate poverty, education itself becomes poor at learning. For international organizations, the presence of poverty justifies

[...] the need for effective technical intervention, which seeks to count, identify, select, and also train the poor to “overcome” the so-called new forms of impoverishment and social vulnerability. This definition blames the poor individual for their poverty, detaching them from the real conditions that determined their situation (Freire; Cortez, 2020, p. 28-29).

Now, the newly inaugurated poverty of learning exacerbates the blaming of the school, teachers, and students for the results and, technically, it is measured and proven by large-scale assessments. These issues are further highlighted in the context of the COVID-19 pandemic, as shown in the *Annual Report 2021: From Crisis to Green, resilient and Inclusive Recovery* (World Bank, 2021), which expresses the impact of this health crisis on people's health and well-being, learning losses, violence and the increase in gender-based violence. Thus,

This year, the COVID-19 pandemic has continued to have a detrimental impact on the health and well-being of billions of people, devastating economies and exacerbating inequality around the world. In 2020, around 100 million more people were driven into extreme poverty. Between 720 million and 811 million people went hungry in 2020 - approximately 161 million more than in 2019. School closures have left around 1.6 billion students without classes, generating significant learning losses. Disruptions in health services have meant that many non-communicable and preventable diseases go untreated. Women and girls are especially affected by these far-reaching impacts, as they are more likely to lose their jobs or stay out of school, as well as face an increase in gender-based violence (World Bank, 2021, p. 10).

The granting of loans by the World Bank, announced as support for Latin American and Caribbean countries, presupposes protection and investment in human capital, with “[...] a response to the Covid-19 crisis, mainly in the areas of health, social protection, education, support for companies and job creation, as well as aid to countries for the purchase and distribution of vaccines.” (World Bank, 2021, p. 39). In addition, the World Bank signals that it would continue to “[...] support progress on structural reforms, while investing in inclusion, gender equality, productive jobs, and climate resilience” (World Bank, 2021, p. 39).

In the *2021 Annual Report: From Crisis to Green, resilient and inclusive recovery*, it is reported that the “[...] pandemic has had catastrophic health, economic and social impacts across Latin America and the Caribbean [...]” (World Bank, 2021, p. 42), where “[...] more than half of the region's households reported income losses, and 18 million people suffered food insecurity. School closures affected more than 170 million students, with learning losses estimated at 1.7 years” (World Bank, 2021, p. 42). Therefore, “[...] ensuring access to quality health services and education remains one of the highest priorities in the region” (World Bank, 2021, p. 40).

The concept of learning poverty is also reiterated, respectively, in the *2021 Annual Report: From Crisis to green, resilient and Inclusive Recovery and the 2022 Annual Report: Supporting Countries to adapt to a Volatile World*:

Even before the pandemic, the world had been experiencing a learning crisis, with almost 260 million children and young people out of school. *In developing countries, 53% of all children aged 10 were unable to read and understand a simple text, an indicator we define as*

*learning poverty*. Prolonged school closures and the economic slowdown amid the Covid-19 pandemic have exacerbated the crisis. At the height of the school closures in April 2020, 94% of students were left without classes. We estimate that the learning poverty rate in low- and middle-income countries could reach 63% and that children affected by learning losses could lose US\$16 trillion in lifetime earnings - almost 10% of global GDP - because of the pandemic (World Bank, 2021, p. 62, emphasis added).

Learning poverty is the index used to define the lack of ability to read and write a simple text (World Bank, 2020). This index has become a criterion for funding because

Given the scale of the challenges and the competition for funding, *countries need to focus their efforts on the most pressing priorities and the most cost-effective approaches to tackling learning poverty* (World Bank, 2022, p. 61, emphasis added).

Learning poverty, according to the World Bank, which includes the lack of ability to read and write texts and perform simple mathematical calculations, becomes a condition for granting Bank funding, based on the classic neoliberal economic relationship of cost-benefit, translated into the idea of effectiveness. This notion requires countries to come up with immediate solutions to combat the poverty of learning, which must be able to be measured by the countries' educational evaluation systems and international exams. The results of educational evaluations are criteria for monitoring effectiveness in the fight against learning poverty and, consequently, are parameters for new funding.

In practical terms, the so-called poverty of learning, generated by the social and economic inequalities typical of capital, becomes one of the World Bank lines of credit. This is another reason to generate more profit for the Bank while compromising the formation of human capital, which is necessary for the reproduction of capital.

In the *2022 Annual Report: Supporting Countries to Adapt to a Volatile World*, the Bank emphasizes collaboration “[...] with countries to promote access to quality health services and education for all” (World Bank, 2022, p. 34). The World Bank signals its support for countries in the Latin American and Caribbean region, as it believes that,

[...] protecting and investing in human capital; increasing resilience to better manage and withstand shocks; promoting inclusive growth; attracting private investment; strengthening institutions; and interacting with traditionally excluded groups, such as Indigenous peoples, Afro-descendants, and rural communities. We also help countries implement structural reforms and promote inclusion, gender equality, and green growth (World Bank, 2022, p. 34).

The Report reiterates *Collapse and Recovery: how the COVID-19 pandemic eroded Human Capital and What to Do about it* (World Bank Group, 2023), that

[...] human capital refers to the health, skills, knowledge, and experience that people accumulate over their lifetime. Not just of intrinsic value, these attributes also make people more productive. Or, put differently, human capital is wealth embodied in people. Indeed, for many poor people around the world, their human capital is the only important source of wealth they have (World Bank Group, 2023, p. 2).

The World Bank Group points out that the prolonged closure of schools has had two effects on human capital. Firstly, there have been profound losses in learning. Secondly, one month of

school closures led to an average of one month of lost learning, even with extensive remote learning efforts (World Bank Group, 2023).

The losses in learning pointed out by the World Bank are consistent with the notion of the learning crisis/poverty, as are the means of controlling the formation of human capital, which are central aspects not only for measuring the formation of this human capital but also for seeking control over this formation.

One of the ways of controlling the formation of human capital can be seen in the evaluation processes, with evaluations being the necessary mechanism for measuring and controlling education in peripheral countries. This issue is addressed in the next section.

## Evaluation as a control mechanism for the World Bank

Educational evaluation, within the context of social policies, is one of the forms of social control in peripheral countries. In the World Bank proposal (2020), in addition to the immediate concern about health issues caused by COVID-19, it is also possible to see the importance of evaluation processes in countries that are considered vulnerable.

The World Bank claims to be “[...] helping the most vulnerable countries assess the sustainability and transparency of their debt, two essential criteria for achieving good development results” (World Bank, 2020, p. 4). This aid is related to, and to some extent conditional on, the reopening of the economy and the re-establishment of services and jobs for a sustainable recovery. Sustainability, in turn, is also linked to sustained growth. In this respect, the World Bank (2020) emphasizes that the indebtedness of countries through fundraising is fundamental for development, as it can help finance projects to achieve sustained and inclusive development.

Regarding country indebtedness, the World Bank states that its “[...] work on public debt focuses on three core areas: promoting debt transparency, enabling effective debt and fiscal risk management, and addressing debt vulnerabilities” (World Bank, 2020, p. 44). The data required by the World Bank are ways of controlling and assessing debt levels; control and debt made explicit in the context of the pandemic, in the acute form of neoliberalism, also called ultra-neoliberalism. In other words,

[...] ultra-neoliberalism is the most recent form of neoliberalism, which is not limited to Brazil, as it can be observed in several countries around the world. Most authors in the critical field, whether they adopt this term or not, agree that neoliberalism is undergoing an inflection that deepens its assumptions as a result of the 2008 financial crisis. Although the crisis centered on the activities of the private financial sector and was part of a structural moment in the crisis of capital that has been going on for decades, it was once again presented as a crisis of the state [...] (Behring; Cislighi; Souza, 2020, p. 106).

If the economic crisis is once again justified by the bias of the state, assessing and reducing risks, and reaching sustainable levels of debt, are a concern intensified in the World Bank guidelines, for example, in the Report Supporting Countries in Adapting to a Volatile World (World Bank, 2022). However, the discourse is that “The Bank was one of the first global institutions to highlight the

danger of rising debt in developing economies, warning the world more than a year before COVID-19 that debt levels were becoming unsustainable” (World Bank, 2022, p. 50).

The accumulation of public debt is, for the World Bank (2022), one of the main consequences of the crises, and needs to be reduced especially in the poorest countries, which must strengthen their governance and accountability for debt sustainability. However, it was (and is) the state that “[...] absorbed the losses of capital through public funds, with the justification that banks and financial institutions were ‘too big to fail’, which would affect society as a whole” (Behring; Cislighi; Souza, 2020, p. 106). A sustainable recovery presupposes, as one of its elements, the reduction of poverty, while at the same time, the Bank needs the indebtedness of states as a way of sustaining financial capital.

The World Bank (2020) points out how far the world is from achieving the goal of eradicating poverty by 2030. We emphasize that poverty eradication is part of the UN’s agenda, set out in Sustainable Development Goal 1 (SDG1), which established the goal of eradicating poverty in all its forms and all places. The World Bank consultancy offer (2020) focuses on protecting people and companies from the impacts of the crisis and increasing resilience.

According to the World Bank (2020), the alleviation of extreme poverty requires more efficient and more extensive data from poor countries most affected by fragility and conflict. Given this, a World Bank Group initiative provides support for a set of economic, social, and sustainability statistics to monitor and evaluate countries in terms of their policies and programs.

From a monitoring perspective, there is a growing number of mechanisms for evaluating and measuring poverty and, in education, for measuring learning poverty, through international and national large-scale assessment systems. As a way of tackling the so-called global learning crisis or poverty of learning, which has been accentuated by the pandemic, the practice of evaluation is intensifying in education. The World Bank evaluates countries separately, but in its considerations, it always makes indications in the direction of implementing general reforms.

Educational evaluation, along the lines of the World Bank proposal, translates into the application of standardized, large-scale tests as a way of controlling training and “protecting” human capital. The quest to assess learning has become more pronounced in the context of the COVID-19 health crisis, as the loss of learning represents a loss of human capital for the World Bank. Evaluating this human capital is fundamental to ascertaining the results of the funding offered to social areas.

According to the World Bank, “School closures are estimated to have generated learning losses equivalent to up to one full year of schooling” (World Bank, 2021, p. 35). With the closure of schools, the pandemic has required a link between long-term educational needs and improved learning, with an emphasis on distance learning.

In the context of the pandemic, the World Bank (2021) pointed out that it generated and disseminated guidelines and advice to countries on reopening schools and evaluating distance learning solutions, providing reading materials and training for institutions. When assessing the extent of learning losses in Latin American and Caribbean countries, the World Bank proposed helping countries mitigate the impacts of these losses by “[...] strengthening the quality of education, building and renovating schools, developing virtual platforms and other learning alternatives, and promoting more equitable education” (World Bank, 2021, p. 42).

In the context of the COVID-19 pandemic, in helping countries to manage the continuity of schooling until schools reopen, the proposals involved focusing on learning to minimize dropout. Of the proposals set out, the World Bank worked with the idea that countries needed to find ways to promote the combination of face-to-face and remote learning. In this direction, the Bank announced that it was

[...] promoting the resumption of learning and, at the same time, ensuring that schools can function safely through health protocols and better hygiene practices; campaigns to promote re-enrollment and prevent dropout based on alert systems; school lunch programs; the combination of face-to-face and remote learning through technology and training to help teachers assess and remedy learning losses (World Bank, 2020, p. 51).

In the report *Collapse and Recovery: how the Covid-19 Pandemic Eroded Human Capital and What to Do About It* (2023), the World Bank Group points out that there have been huge learning gaps due to school closures, so a lot has been lost in terms of human capital. However, in the document, policies are indicated which, according to the Group, can be proven to reverse the losses in terms of human capital.

One of the recommendations is for the challenges faced by school-age children. To overcome learning losses, it would be necessary to “[...] Assess learning, match instruction to student’s level, launch catch-up campaigns for students who have fallen furthest behind [...]” (World Bank Group, 2023, p. 10).

Assessment is proposed as a way of guaranteeing quality, both in terms of transparency and financial support for peripheral countries and in terms of educational proposals. As Zanardini (2008) explains, assessment only has a reason to exist concerning the social project to which it responds. In this sense, the assessment of learning proposed by the World Bank is aimed at diagnosing the basic skills and competencies that students need to develop during their schooling and throughout their lives. It is through this diagnosis that the Bank’s proposals are made, and in the documents discussed in this text, they are aimed at recovering the losses caused by the closure of schools during the COVID-19 pandemic.

Iijima (2021) emphasizes that, for the World Bank, educational evaluation is related to the quality of education and accountability policies. Learning outcomes are monitored, and the diagnosis of skills and competencies, with a focus on assessment results, is part of the World Bank educational project for the formation and control of human capital in peripheral countries, such as Latin American nations.

## **Final considerations**

The World Bank is a development agency that invests in intellectual production to give legitimacy to its proposals. In peripheral countries, such as Latin American and Caribbean nations, the World Bank proposals are linked to the conditionalities signed in loan contracts, covering the areas of education and health. In the educational sphere, the human formation project is translated into the formation of human capital, which corresponds to the relationship between learning and educational evaluation.



The Human Capital Project in the context of Latin America and the Caribbean, from 2020 to 2023, corresponding to the health crisis of the COVID-19 pandemic, intensified the countries' indebtedness and the control of social policies, under the argument of protecting human capital.

In the World Bank documents examined during this period, we can see the concern to guarantee a healthy and exploitable workforce in Latin American and Caribbean countries, especially in the face of the impacts of the pandemic.

The losses in learning pointed out by the World Bank are linked to the notions of crisis/poverty of learning, which refer to the concern with protection and investment in human capital formation, in the context of the health crisis of the covid-19 pandemic. For the World Bank, the formation of human capital includes both measuring and controlling this formation.

Educational assessment, in this sense, as well as helping to control economic and social processes in peripheral countries, seeks to tackle the so-called global learning crisis, intensified by the COVID-19 pandemic. Educational assessment is related to measuring the quality of education and making diagnoses linked to the acquisition of skills and competencies. Evaluating human capital is also a way of verifying and monitoring the results of World Bank investments in social areas for Latin America and the Caribbean.

As a result of this study, we found that the World Bank's Human Capital Project is linked to all the economic reforms and policies with a neoliberal dimension, based on the justifications of promoting economic growth, sustainable and inclusive development, reducing poverty and learning rates, which, according to the World Bank, can compromise the formation and maintenance of human capital, especially in the context of the covid-19 pandemic.

The notion of learning poverty, characterized as the lack of ability to read and write texts and perform simple mathematical calculations, has become a condition for the Bank to release funding in the context of the COVID-19 pandemic. According to World Bank guidelines, these resources should be applied effectively, with national and international educational evaluations indicating the results in terms of whether or not the aforementioned learning poverty had been reduced.

In practice, the so-called poverty of learning, caused by the social and economic inequalities of the capitalist system and intensified during the COVID-19 pandemic, becomes a line of credit for the World Bank, in other words, another source of profit for the Bank, as well as a threat to the formation of human capital, which is indispensable for the reproduction of capital.

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