

EDUCATIONAL IMPORT  
LOCAL ENCOUNTERS WITH GLOBAL  
FORCES IN MONGOLIA

*Gita Steiner-Khamsi and  
Ines Stolpe*



EDUCATIONAL IMPORT

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First published in 2006 by

PALGRAVE MACMILLAN™

175 Fifth Avenue, New York, N.Y. 10010 and

Houndmills, Basingstoke, Hampshire, England RG21 6XS

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ISBN 1-4039-6810-1

Library of Congress Cataloging-in-Publication Data

Steiner-Khamsi, Gita.

Educational import : local encounters with global forces in Mongolia / Gita Steiner-Khamsi and Ines Stolpe.

p. cm.

Includes bibliographical references and index.

ISBN 1-4039-6810-1 (alk. paper)—ISBN 1-4039-6811-X (alk. paper)

1. Education—Mongolia. 2. Educational change—Mongolia. I. Stolpe, Ines.

II. Title.

LA1341.S74 2006

370.95173—dc22

2005053509

A catalogue record for this book is available from the British Library.

Design by Newgen Imaging Systems (P) Ltd., Chennai, India.

First edition: April 2006

10 9 8 7 6 5 4 3 2 1

Printed in the United States of America.

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## ACKNOWLEDGMENTS

For years, each of us was conducting research on educational reform in Mongolia from separate corners of the world. Already accustomed to being regarded as eccentrics within comparative education, we met in Berlin in 2002 and realized there was at least one other person fascinated with educational developments in Mongolia. Four respected colleagues at Humboldt University, Berlin, made this fortuitous meeting happen: Jürgen Schriewer, Jürgen Henze, and Martine Tarrieux in the Department of Comparative Education, and Uta Schöne, Director of Mongolian Studies in the Institute for Asian and African Studies. Without them, the chapters of this book would never have come together under the same cover.

Given the distance from New York and Berlin to Ulanbaatar, it can be difficult to maintain close personal and professional ties with Mongolia. While several Mongolian and international institutions helped us bridge that distance, we would like to highlight two, in particular, that both literally and figuratively kept us going over the past years: the Mongolian Foundation for Open Society (MFOS) and the Achlal Project in Ulaanbaatar. The initial contact with MFOS was established by Liz Lorant, Open Society Institute New York, who, in 1998, managed to convince Mongolian colleagues—inundated with short-term consultants from abroad—to take a closer look at these international consultants/researchers who seemed committed to Mongolia for the long run. A good long run it has been, thanks to Liz. In 2004, the MFOS was dissolved and replaced with several Mongolian nongovernmental organizations. Two of them remained as our home bases in Mongolia: the Mongolian Education Alliance (MEA), directed by Natsagdorj Enkhtuya, and the Open Society Forum, directed by Perenjei Erdencjargal. Two projects of the MFOS/MEA, School 2001 and Teacher 2005, profoundly shaped our assessment of how “traveling reforms” are encountered in Mongolian schools and in teacher education. Additionally, the Achlal Project, directed by Davaanyam Azzayaa, helped us ground our work in the experiences of families living in the poverty-stricken shantytowns surrounding Ulaanbaatar. The Achlal Project offers schooling to dropouts in the Bayankhoshuu city-district, and provides support for disadvantaged families in Ulaanbaatar. Without much publicity, the project has been run for ten years on a low budget while making a great impact on the education, health, and self-esteem of several hundred children and families. Only in 2004 did Achlal receive international funding from the Global Fund for Children, based in Washington, DC. Azzayaa, Enkhtuya, and Erdencjargal

are not only colleagues, but also close friends. The work that they have done, and continue to do, is the inspiration for this book.

The Mongolian National University of Education and the Mongolian National University became important venues for collaborating with the best education experts in the country. We see ourselves as students (*shav'*) of many visionary Mongolian experts in education and history including Ookhnoi Batsaikhan, Tsedenbal Batsuur', Nadmid Begz, Sharav Choimaa, Tümenbayar Dashtsedan, Süren Davaa, Yadam Ganbaatar, Amgaabazar Gerelmaa, Badrakh Jadamba, Onorkhan Kuliash, Ochirjav Myagmar, Dondovsambuu Purevdorj, Byambajav Purev-Ochir, Balchinbazar Sumy'aasüren, Sengedorj Tümendelger, and Dagiisüren Tümendemberel. Without these teachers, this book would have been two hundred pages shorter. We are also grateful to Badrakh Jadamba and Johnny Baltzersen who in 2004 gave us access to the 40 partner schools of the DANIDA-funded Rural School Development Project. Over the course of writing this book, we often recalled the visits to those schools, especially the long trips by jeep that we took to reach them. During these trips, we found ourselves debating the future of educational reforms in Mongolia. Thankfully, Gerelmaa, Jadamba, and Johnny always had an opinion, making our discussion come alive and taking the chill out of the evening air in remote villages. At a time when other international donors abandoned rural schools, they mobilized funds to keep the schools networked, and added legitimacy to the tireless and valuable work being done in the rural areas of Mongolia.

Having relied for years on the insights of Mongolian colleagues, it was important to us to give something back by sharing our research with those working in Mongolia. The Open Society Institute (Budapest) and the Open Society Forum (Ulaanbaatar) supported our plan without hesitation. Thanks to the directors of these two nongovernmental organizations, Perenlei Erdenejargal and Katalin Koncz, this book will be translated into Mongolian, reaching colleagues and decision makers in Mongolian education who can really make a difference.

The faculty and doctoral students in our two home institutions have been very supportive of this collaborative research project. We would like to acknowledge, in particular, the support of Ingeborg Baldauf, Director of the Institute of Asian and African Studies (Humboldt University, Berlin), and colleagues in the Department of International and Transcultural Studies (Teachers College, Columbia University, New York). The Thursday doctoral seminar group at Teachers College, Columbia University, showed such great enthusiasm for the project that they ended up hearing more about policy borrowing in Mongolia than they ever asked for.

In the final stages of the book, we relied on several individuals in the United States who provided us critical feedback. Nicole Angotti, Eric Johnson, Manu H. Steiner, and especially William deJong-Lambert, made numerous suggestions as to how better illustrate our accounts and sharpen our interpretations.

Even though many scholars don't like to acknowledge their weaknesses, they tend to know their strengths well. In this book, one of us is a specialist in international education policy studies, and the other in Mongolian studies. We hope that, by virtue of being a team of two authors, we have eliminated many of the misconceptions about educational reforms and development in Mongolia. If we haven't, we always have each other to blame.

At Palgrave Macmillan, Amanda Johnson has accompanied us throughout. From her initial support for the book proposal, to her skillful review of the manuscript, she has shared our conviction that there is something to be learned by looking beyond traditional horizons and studying traveling reforms in Mongolia.

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## GOING GLOBAL: STUDYING LATE ADOPTERS OF TRAVELING REFORMS

This book represents an attempt at understanding why so many educational reforms in Mongolia have been tailored after reforms from elsewhere. Globalization does capture, in a very broad sense, what has been occurring in Mongolia. This trendy characterization suffers, however, from many shortcomings. Among other deficiencies, it is devoid of agency, process, and rationale. Who drives the import of educational reforms? How does policy transfer to Mongolia from elsewhere occur? Why do certain global reforms resonate in Mongolia? Why not others? These are the kinds of questions that help us investigate why educational reforms in different parts of the world, including in Mongolia, are becoming “strikingly similar” (Samoff 1999: 249). While the script of this book may tell a story of globalization and Mongolian education, the fine print traces complex traveling reforms that landed, in some cases with considerable delay, in Mongolia.

### THE CASE: WHY MONGOLIA?

Intuitively, one would not expect large-scale policy import in Mongolia. One-third of the population consists of nomadic pastoralists and another one-third is registered as poor or very poor. Yet most educational reforms in Mongolia are modeled after reforms from high-income countries with sedentary populations. By using Mongolia as a case for studying globalization in education, we adopt a somewhat counterintuitive methodological approach in that we select an educational system that seems, at first glance, least likely to engage in policy import. However, despite all expectations, policy makers in Mongolia actively and enthusiastically engage in policy borrowing. Why Mongolia? The question is twofold: why did *we* select Mongolia as an intriguing case study of globalization in education, and why is educational import so common *in* Mongolia?

### A Strong Case for Studying Globalization

With 2.4 million inhabitants in a territory half the size of India, and a population density of 1.5 people per square kilometer, Mongolia is one of the

least densely populated countries in the world. Mobility, sparse population, hostile environmental conditions, seasonal migration, and the remoteness of herder families, traditionally constituted the main challenges for securing universal access to education. With the collapse of the Soviet Union and the socialist Council for Mutual Economic Assistance (CMEA), and the subsequent decrease of external financial assistance in the 1990s, maintaining universal access has become an issue. The gross enrollment ratio in basic education (grades 1–8) is still high when compared to other low-income countries, but it has decreased dramatically in the postsocialist era. In 1990, the ratio was 99 percent as opposed to 89 percent 10 years later. Two-thirds of the children that are not attending school, or drop out of school, are boys. Mongolia is one of the few countries in the world where the educational attainment of males is significantly lower than that of females and where the next generation is less educated than that of the parents' generation. The gender and generation gaps are not the only features that set education in Mongolia apart from other countries. Coming to grips with nomadic education, for example, is another major and unique challenge. There are abundant additional distinct features in Mongolian education—some of which are related to the postsocialist, nomadic, and Central Asian education space it inhabits—which urge us to ask why reform strategies from other countries were seen as a panacea for resolving local challenges in the education sector.

A central question in globalization studies is whether educational systems are abandoning their distinct cultural conceptions of “good education” or “effective schools,” and are gradually converging toward an international model of education. One of the explanations most frequently given for the international convergence of educational systems is the following: Once the barriers for global trade are eliminated, anything can be imported and exported, including educational reforms. Since the trajectory of that trade tends to be unidirectional—transporting educational reforms from high-income to low-income countries, and rarely the other way around—educational systems in different parts of the world are increasingly becoming similar. It appears easier to describe the features of such an international model of education than to actually name it. Attempts have been made at various times to find an appropriate label for the convergence process. The classic sociological explanation has been modernization, followed by Westernization, neocolonization, Americanization, and McDonaldization. For the past decade, authors have equated the international model of education with the neoliberal model of educational reform (e.g., Henig 1994).

The problem with labels is not the associations they invoke, but the problem lies with the worldview or grand theories to which one has to subscribe to believe them. Each label reflects a particular view of dependence, hegemony, and exploitation, and excludes other perspectives that are necessary to explain convergence in a particular context. Regardless of terminological and theoretical disputes, the fact remains that the idea of *education sans frontière* has been a cause for celebration for some, and a source of anxiety for others. These sentiments are especially pronounced for the

Table 1.1 Comparative Case Study Analyses and the Study of Globalization

	Same Outcomes	Different Outcomes
	I	II
Most Similar Systems	Weak case for studying convergence	Strong case for studying divergence
	IV	III
Most Different Systems	Strong case for studying convergence	Weak case for studying divergence

“strong cases” of convergence, that is, for systems from which one would not expect a convergence toward an international model. Arguably, Mongolia qualifies as such a strong case.

A brief overview of comparative methodology is useful to justify our belief that Mongolia serves as a strong case for examining globalization in education. We present in Table 1.1 the distinction made in comparative case study analyses between systems and outcomes (Berg-Schlosser 2002: 2430; see also Przeworski and Teune 1970), and extend it to the study of globalization in education.

Of course, the terms “strong,” “weak,” “convergence,” and “divergence” are methodological. However, the strength of a case lies, as is discussed in the following section, in its explanatory power.

### Quadrant I

Little explanation is necessary as to why educational systems that are similar with regard to their political, economic, and social context move in the same direction of educational reform. For example, the outcomes from the transatlantic exchange of educational reforms between the United States and the United Kingdom during the conservative Reagan/Thatcher era was, although amply documented and meticulously traced, hardly a surprise. After all, the “policy attraction” (Phillips 2004) between the two systems encompassed many areas and was not restricted to choice, privatization, and other market-oriented reforms in education.

### Quadrant II

Comparative education researchers often feel compelled to explain the unexpected: Why do educational systems that are economically, politically, and socially similar generate different outcomes? This question is often asked when certain educational systems score lower on international student achievement studies than other systems with comparable standards. For example, the findings of the Third International Mathematics and Science Study (TIMSS) in the mid-1990s generated a huge apparatus of educational studies, and triggered a lively public debate in the U.S. media highlighting

the weaknesses of U.S. math and science education as compared to other highly industrialized countries (LeTendre, Akiba, Goesling et al. 2000). Five years later, publication of the league table from the Programme for International Student Assessment (PISA) findings elicited a similar response in Germany. The below-average performance of German secondary school students was not only surprising but was publicly framed as a scandal for the German educational system. Particular attention was given to low performance in reading literacy. Not only did German students score significantly below the average of other OECD educational systems, but the distance between students performing in the top and bottom 5 percent was greater than in all the other 31 participating countries (Baumert, Klieme, Neubrand et al. 2001). Both TIMSS in the United States and PISA in Germany constituted strong cases for investigating divergence with regard to student achievement outcomes.

### Quadrant III

The contrastive method of comparison—comparing most different systems that manifest different outcomes—is at the same time the most common and the least informative type of comparison. The Cold War studies of the 1960s, in which researchers from both camps compared their most different systems (United States of America and USSR), as well as the U.S. fascination with the Japanese educational system in the 1980s, were nested in a contrastive research design. Although these studies (over)emphasized differences, their cases were methodologically weak for explaining why the math and science achievements of U.S. students lagged behind those of their counterparts in the USSR and Japan. Left with little explanatory power, researchers resorted to commonsensical reasons by highlighting differences in the larger political, economic, or social context in order to explain different outcomes in the educational system.

### Quadrant IV

Our selection of Mongolia as a case for studying globalization is situated here. Mongolia is, methodologically speaking, a case of a “most different system” with “similar outcomes.” Finding traces of policy borrowing *even* in Mongolia might be used as strong evidence for an emerging international reform model in education. For example, one could make the point that if vouchers and outcomes-based educational reforms were imported by Mongolia (and they were), then they must have been considered everywhere else too. Obviously globalization has affected educational systems that are similar to each other and therefore prone to “learn from each other.” But it has also affected systems, such as Mongolia, that are very different, and thus, at first glance, least likely to benefit from lesson drawing and emulation.

We suggest it is time to pause and think about the possibilities of a case study design that attempts to capture globalization in education: How different is

“different” and how similar is “similar,” and what are the units of comparison? Qualitative comparative research stands and falls on the selection of cases that are both meaningful for the object of study and commensurable for comparison. Committed to contextual analysis, we feel compelled to present Mongolia as a unique case or a bounded system and to tell the “causal stories” (Tilly 1997: 50) that relate to educational import. At the same time, we are interested in learning from comparison, and thus we render explicit the other cases or systems with which we are comparing educational import in Mongolia.

### A Site for Analyzing the Politics and Economics of Borrowing

Mongolia changed political allies in 1990, and the country’s move from an “internationalist” (socialist) to an international world-system has had major repercussions for educational import. The postsocialist government has had to learn to speak a new language of reform and has periodically been put under international pressure to act upon it. The new language of market orientation, cost effectiveness, and state deregulation is spoken whenever loans and grants are in sight. These two features—political reorientation and economic dependency—make Mongolia an ideal site for investigating the politics and economics of policy borrowing. Unfortunately, both of these research areas tend to be neglected in globalization studies.

Sociologists at Stanford University, particularly John Meyer and Francisco Ramirez, are regarded as pioneers in globalization studies. As comparative sociologists they have built their argument about globalization on longitudinal studies of educational systems. According to neoinstitutionalist theory, or world culture theory, educational systems have converged not only toward the same “world standards” with regard to the structure, organization, and content of education (Meyer and Ramirez 2000: 120), but also toward the same values of progress and social justice (Boli and Thomas 1999; Chabbott 2003; Ramirez and Meyer 2002). Ramirez writes,

There are not only more schools and more students (in absolute and relative numbers) than there were at the beginning of the twentieth century, but there are also more common ways of envisioning and interpreting the realities of these institutions. (Ramirez 2003: 247)

The curiosity of scholars in globalization studies with what neoinstitutionalism or world culture theory has to offer is not confined to the question of whether or not reform models in different parts of the world are actually converging toward a singular global model of “modern schooling.” They are also interested in whether an adoption of reform models from elsewhere is voluntary or imposed, randomly diffused or systematically disseminated, a complement or a supplement to existing local reforms, and ultimately, good or bad.

Neoinstitutionalist theory has a lot to offer in answering these important questions, but we will restrict ourselves to a critical methodological,

comment. Ramirez and Meyer postulate global convergence, but they use countries from a world-system that is one and the same to substantiate their claim. They turn a blind eye to educational systems from other world-systems that are quite different and thereby assume that there is only one world-system. Given the circularity of their argument, the convergence of educational systems within one and the same world-system comes as little surprise. Our methodological critique becomes apparent when we examine the selection of cases on which neoinstitutionalist theory rests. The cases are either countries of the First World, or countries of the Third World colonized by the First World. Methodologically speaking, neoinstitutionalist theory does make an interesting case for international convergence, but its claims rest on weak cases. What is absent from their account is the history of colonization, which would explain some of the similarities between First World and Third World countries, and the history of the Cold War. The Second World, or the other half of mankind (more than 30 postsocialist countries), is conspicuously missing from their list of cases. Until 1990, postsocialist countries inhabited their own, separate world-system. Of course, "progress" and "social justice" had a firm place in socialist value systems, but to be sure, they had a completely different meaning than in capitalist systems.

Anderson-Levitt and her colleagues (Anderson-Levitt 2003) took on the project of scrutinizing the grand claims on which neoinstitutionalist or world culture theory rests, and they did so by juxtaposing it with anthropological notions of culture. As announced in the title of their book, *Local meanings, global schooling*, the authors investigate "local meanings" to visions and pressures of "global schooling," and they find a multiplicity of (local) meanings or outcomes. Their criticism builds on this finding and serves them as evidence for denouncing the homogenizing effects of globalization that neoinstitutionalist theory has asserted. The contributors illustrate that although choice, student-centered learning, outcomes-based education, marketization of schools, and so on went global, they neither replaced already existing models, nor meant the same thing in various cultural contexts. For example, "choice" with regard to the language of instruction, propelled by U.S. missionaries in Tanzania (Stambach 2003) is, for a variety of reasons, a different thing altogether than the "choice" in math instructional methods that factions of PTA associations in California were combating (Rosen 2003). They criticize convergence theories for taking global schooling models at face value without scratching at the surface and examining how they play out differently at the community level. To phrase it more pointedly, convergence theorists seem to have mistaken brand name piracy such as choice, outcomes-based education, student-centered learning, and so on—hijacked from one corner of the world and forcibly moved to another—as heralds of an international convergence of education.

Scrutinizing the claims made by neoinstitutionalist sociologists, Jürgen Schriewer and his coresearchers (Schriewer, Henze, Wichmann et al. 1998; Schriewer and Martinez 2004) remedied the bias in case selection. They acknowledged the existence of several world-systems and examined three of

them: Spain, Russia/Soviet Union, and People's Republic of China. What Schriewer's research group at Humboldt University, Berlin, found was diametrically opposed to the Stanford research team. In their longitudinal study of educational research journals (1920s to 1990s), they used the term "references" literally (Schriewer and Martinez 2004). That is, they analyzed the bibliographies published in Spanish, Russian/Soviet, and Chinese journals, and interpreted the type of references made. There is no evidence, they conclude, to suggest that we are increasingly reading the same books and journals in different parts of the world and as a result share the same (international) knowledge on education. What they established instead is a close correspondence between references and political developments in each of the three countries. In other words, whether authors of educational research journals are receptive or hostile toward scholarship from other countries, has to do more with what is going on politically in their own country than with globalization. It is on this question of receptiveness toward internationality that Schriewer and Martinez (2004) make a convincing point. During periods of political isolation, authors either drop their references to scholars from abroad, or else use them in a disparaging manner to distance themselves from foreign influence. They remark that a country's historical and political context (referred to as "socio-logic") is a better predictor of internationality in educational knowledge than globalization (Schriewer and Martinez 2004: 33). In fact, the era of the greatest convergence with regard to educational knowledge was in the 1920s and 1930s, when educational researchers in Spain, Soviet Union, and China were drawn to John Dewey's writing. After that brief period, Dewey was dropped from the reference-list in Soviet educational journals and replaced by Krupskaya (Lenin's wife). It is striking that against all expectations of international convergence theorists, educational knowledge in the three countries did not become more internationalized after the mid-1980s, when all three countries opened their ideological boundaries and increased their international cooperation.

For our own study of educational import in Mongolia, we embrace all three of the contributions from globalization scholars just discussed (the neoinstitutionalist focus on long-term trends, the anthropological emphasis on local contexts, and the "socio-logical" receptiveness toward external forces). We also add a fourth that is pertinent to the politics and economics of policy borrowing. The three groups of globalization studies differ, but they complement each other in important ways. Arguably, once we acknowledge the existence of different policy levels, the distinctions made by proponents and opponents of convergence theory become minute, if not obsolete. For example, even though "choice" in education plays out differently in different cultural contexts (Anderson-Levitt's line of argumentation), and resonates for different reasons in different systems (Schriewer's point about the "socio-logic" of selective borrowing), the fact nevertheless remains that "choice" as a concept or a discourse went global (Ramirez and Meyer's conclusion). There is a convergence of educational reforms, but perhaps it is only at the level of brand names, that is, in the language of



reform. Once a discourse is transplanted from one context to another and subsequently enacted in practice, it changes meaning.

That said, the points made by all three groups of globalization researchers are well taken, and we should by no means set aside this lively debate among comparative researchers. Each one of them illuminates a different aspect of globalization. For example, it is indeed revealing how a global discourse changes meaning in a local context (Anderson-Levitt), why only specific global discourses resonate locally or "socio-logically" (Schriewer), and how global pressure has been institutionalized in ways to make national decision makers adopt shared global visions of education (Meyer and Ramirez). An inquiry into how global reforms have been indigenized, or "Mongolized," in Mongolia is as intriguing as why only certain traveling reforms have ever made it to Mongolia. We do not attempt to use educational import in Mongolia as a case to recycle what others have already noted. Alternatively, we draw on interpretations provided by the three groups of globalization researchers discussed earlier and offer our own additional proposition. Arguably, our view of globalization is markedly influenced and differentiated by our focus on the politics and economics of policy borrowing.

Most of our own studies so far (e.g., Steiner-Khamsi and Quist 2000; Steiner-Khamsi 2004a) stressed the political reasons for transnational policy borrowing, and we have only started to explore the economic ones (Steiner-Khamsi and Stolpe 2004). In this book we combine, for the first time, both perspectives. There is an aspect of globalization that is often neglected in these studies: convergence in the language of reform as a result of economic necessity, that is, as a result of imposed transnational policy borrowing. This is not an inconsequential point for low-income countries that depend on international grants and loans. In these countries, a portfolio of "best practices," or worse, a complete reform "package," must be imported as a condition to receive funding. As Jones (2004) poignantly notes, international financial institutions are not only in the business of granting loans but also lending ideas. It would be absurd to deny that global pressure in the form of international agreements, a conditionality for receiving external funding, exists in Mongolia. Thus, we do not share Chubbott's celebration of Education for All, and other international agreements, as a herald of a new era, in which all governments voluntarily adopt the same international visions for education (Chabbott 2003). Such an interpretation does not sufficiently take into account the economics of transnational policy borrowing.

This is not to suggest that global pressure is a static entity that is forced upon passive, local victims. Any encounter involves at least two actors, and agency needs to be acknowledged for both sides, that is, for international donors as well as for local recipients. How local forces encounter global pressure, or what makes them adopt, resist, or undermine external pressure on domestic educational reform, is a terrain that deserves far more exploration. Furthermore, agency-oriented studies need to recognize a

multiplicity of agencies both among international donors and local recipients. Neither are all international donors in cahoots, pushing the same development agenda, nor are all Mongolians *unisono* either for or against policy import. Similarly, there is great variation at the local level between what politicians pronounce as a fundamental reform, what government officials subsequently legislate in policy documents, and what practitioners eventually implement at the school level. This distinction between "policy talk," "policy action," and "policy implementation" (Cuban 1998) should accompany the reader throughout this book, as it serves as an analytical tool for conducting agency-oriented policy studies.

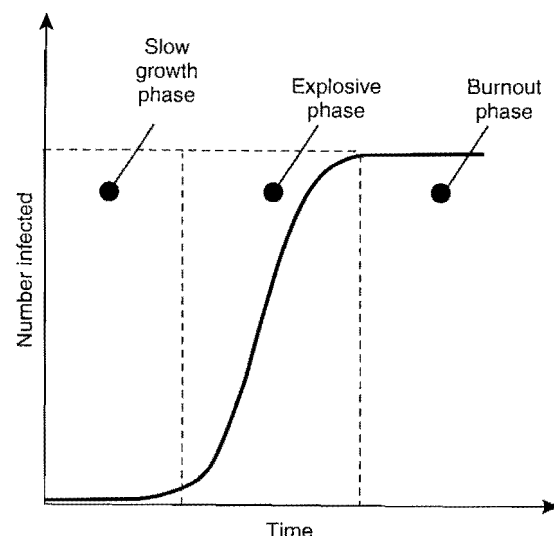
As mentioned before, convergence often occurs exclusively at the level of policy talk, in some instances also at the level of policy action, but rarely at the level of implementation. This leads us to suggest that more attention should be drawn to the politics of educational borrowing. In Mongolia, we found all kinds of local encounters depending on the type of reform: adoption or voluntary borrowing, open resistance to externally imposed reform, and more subtle ways of undermining reform packages transplanted by international organizations. In this book we introduce our own interpretive framework for studying these local encounters with global forces. It is a framework that takes into serious consideration the politics and economics of policy borrowing.

### An Example of Secondhand Borrowing and Late Adoption

The idea of comparing the rapid global dissemination of school reform models to epidemics is not new (see Levin 1998). But it is novel to systematically apply an epidemiological model to explain why, from a plethora of school reforms, only a few appear in different corners of the world. In addition, lately the reforms that have resurfaced in different parts of the world, including in Mongolia, have been neoliberal ones. Thus we ask: What accounts for a contagion, that is, which features of a reform enhance its exportability, and what are the preconditions for transnational policy attraction or import? The analyses of social networks, and in particular Small World research (Watts 2003), as well as earlier studies mapping the diffusion of innovation process (Rogers 1995; see also Gladwell 2002), have much to offer in the way of understanding such reform epidemics. The epidemiological model assumes a lazy S-curve, depicted in Figure 1.1.

Prior to the take-off point, only a few educational systems are "infected" by a particular reform epidemic. At that stage, the early adopters of a reform make explicit references to lessons learned from abroad, in particular, from the reform that they are emulating. A good case in point is the transatlantic transfer of "choice" between the educational systems in the United States, England, and Wales in the early 1990s. A myriad of studies were produced examining how the choice reform functioned in other systems (e.g., Chubb

Figure 1.1 The Epidemiological Model of Global Dissemination



Source: Watts (2003: 172).

and Moe 1992), that is, how the early adopters of choice made explicit references to positive experiences in similar systems. Needless to say, this lesson drawing, or externalization, has a salutary effect and helps to certify a reform that otherwise would have been contested (Steiner-Khamsi 2004b). During the phase of explosive growth, however, more systems adopt a reform, and the traces of transnational policy borrowing disappear. Once a critical mass of such late adopters have borrowed a particular reform, the geographic and cultural origin of the reform vanishes, lowering the threshold for the decontextualized and de-territorialized version to spread rapidly to remaining educational systems. Global dissemination occurs at this stage. An epidemic ends, or the phase of global dissemination ceases, when most educational systems have already selectively borrowed bits and pieces of the reform and thereby generated immunity from other aspects of the reform.

Early adopters are those educational systems that emulate reform from elsewhere during the slow-growth phase, whereas late adopters join a reform movement after a substantial number of systems have already imported the reform. Very often they do not borrow from the original(s), because the educational systems that initiated the reform have moved on to implementing new reforms, but borrow secondhand from other late adopters. Figuratively and literally, Mongolia must be viewed as an intriguing case of secondhand borrowing. Nevertheless, Mongolia, and the rest of the postsocialist world, are late but significant adopters of global reforms. With such a huge mass of educational systems joining the chorus of neoliberal reforms, the few remaining systems that until recently resisted such reforms have little chance of staying immune to them.

## THE AREA

It is easier to situate Mongolia geographically than it is to place it politically, economically, and culturally. Bordering Russia and the People's Republic of China, Mongolia is a Central Asian state. Although located in the center of Asia, Central Asia is often neglected in historical accounts. André Gunder Frank (1992), renowned author of world-systems theory, ends his book *The centrality of Central Asia* with an appeal to recognize the importance of this region for studying long-term changes in world-systems:

May this help convert Central Asia from the sort of dark hole in the middle that it was, to a real black hole whose gravitational attraction can soon engulf the outside and outsiders. (Frank 1992: 52)

There were periods in history when Mongolia and other Central Asian countries saw themselves as part of the same world, such as in the twelfth and thirteenth centuries, under the Mongol Empire, and in the twentieth century, as "fraternalist" socialist states. These are but two of the eras during which the countries of Central Asia inhabited the same geopolitical space. There are, however, vast differences between Mongolia and other Central Asian countries. As Christopher Atwood (2004) astutely points out, there are three groups missing in Mongolia: Russians, Muslims, and Turks. Instead, what Mongolia has to offer are Chinese, Buddhists, and Mongols. Atwood presents his poignant summary based on a comparison with the former Soviet republics of Central Asia, notably with Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. Furthermore, when he makes reference to the presence of Chinese as a signpost of Mongolia, he has Inner Mongolia rather than (Outer) Mongolia in mind. Nevertheless, Atwood's observations serve as a valuable framework to situate Mongolia within its region.

Mongolia, an independent country with its capital Ulaanbaatar, was—in contrast to the five aforementioned Central Asian countries—never a Soviet republic, and therefore not submitted to a Russification or assimilation policy. Nonetheless, with the revolution of 1921, the residents of the Mongolian People's Republic grew up learning that the Soviets were an "older brother" (*akh*) who protected them in the early revolutionary days against Chinese invasion and colonization, as well as "Japanese aggressors" during World War II. After the war the Soviet Union was credited for actively supporting their Declaration of Independence from China. Every child in Mongolia learned that the Soviets helped the country to safeguard its autonomy and remain an independent socialist state. It would be inaccurate to say that the Mongolian People's Republic functioned as the Sixteenth Soviet Republic, but it would be equally wrong to deny the economic, political, cultural, and military dependence of Mongolia on the Soviet Union and other socialist countries. To continue with the list of differences between Mongolia and other Central Asian states, Muslims in Mongolia constitute only 4.3 percent of the total population (Mongolia National Statistical Office 2001) and are mostly

Kazakhs who settled in the western provinces of the country. Finally, Turkish influence in Mongolia has been minor compared to other Central Asian states. Besides the Kazakhs, there is only one other small Turkic-speaking minority, Tuvians, who live in the northwestern part of the country.

Consider what Mongolia, according to Atwood (2004), has to offer. Atwood's reference to the Chinese calls for an explanation of "Greater Mongolia" that encompasses Mongolia, several regions in the People's Republic of China, including Inner Mongolia, and the regions in Russia inhabited by Buriat Mongols. In the People's Republic of China, Mongols live in the Autonomous Region of Inner Mongolia, and furthermore they constitute a large minority in Manchuria (especially in the Barga and Daur region) as well as in the Xinjiang province. From a pan-Mongolian perspective, the region inhabited by the Buriat Mongols in Russia is also considered part of Greater Mongolia. In all these regions, the Mongols have been exposed to, and resented, massive Sinicization and Russification policies. Not surprisingly, these assimilation policies gave birth to some of the most ardent champions of pan-Mongolism (Bulag 2002). Atwood's reference to the overwhelming presence of the Chinese thus applies only to Inner Mongolia, and not to (Outer) Mongolia or to the other regions where Mongols live. The ethnic composition in Inner Mongolia changed in the early twentieth century with the large influx and colonization by Chinese farmers and merchants (Kotkin and Elleman 1999), and since then the Chinese population has represented an ethnic majority. Similarly, the ethnic majority in the Buriat regions of Russia are nowadays Russians, and not Mongols.

In this book we focus exclusively on Mongolia. Beginning with the period of Manchu rule (1691–1911) and lasting until 1924, the territory was known as "Outer Mongolia" or "Northern Mongolia," and covered the current territory of Mongolia as well the adjacent region of Uriankhai, nowadays referred to as Tuva. In 1911, at a time when the Manchu Empire started to weaken and disintegrate, the opposition in Outer Mongolia grasped the opportunity to declare its independence. This period of independence was relatively short-lived: Already in 1918–19 Chinese troops invaded Outer Mongolia, and were only expelled in 1921 with the support of Russian troops. After entering the Soviet sphere of influence, the government adopted a new name, Mongolian People's Republic, which was used from 1924 until 1990.

A comment is in order on the next feature distinguishing Mongolia from other Central Asian countries. The dominant religion is a Tibetan, Lamaist version of Buddhism. As a result, the Mongolians have maintained strong ties with Tibet, and in contrast to Mongolian–Chinese relations, their relationship has never suffered from a history of war and colonization. Whereas Tibet constituted the religious bond, Russia was Mongolia's most important political ally from 1921 to 1990. This political orientation toward Moscow was also echoed in cultural domains because it implied an emulation of values and beliefs associated with (socialist) Europe. To date, the orientation toward Europe is most visible in Ulaanbaatar where comments on the "Un-Asianness" of the city are often heard.

The final feature that Mongolia has to offer is an epitomization of the nomadic lifestyle. The term "Mongol" provokes, as Uradyn Bulag has discussed (2002), all kinds of associations, ranging from romanticizing ("naturalistic people") to masculinizing ("the untamable") to de-civilizing ("barbarian") notions of nomadic life. In Kazakhstan and Kyrgyzstan (Fratkin 1997; Rottier 2003), sedentarization was the primary native reaction to nineteenth-century Russian settlement, ensuring that the indigenous population was not stripped of their own land. Sedentarization was later enforced by Soviet modernization and industrialization. Meanwhile in Mongolia, nomadic pastoralism was preserved undiminished as a result of Soviet-style modernization. In Mongolia, the collectivization of livestock and agricultural land went hand in hand with building a rural infrastructure to ensure that nomadic herders and workers on agricultural collectives had an equitable standard of living and remained in rural areas. After all, the national economy depended on this rural network of animal husbandry and agricultural collectives. Carolyn Humphrey and David Sneath (1999: 179) coined the term "urbanism" to describe the elaborate infrastructure and urban culture that was transferred into rural areas. In stark contrast to this type of "urbanism" in the rural areas, the post-1990s has entailed "urbanization." With the dissolution of the collectives, the financial means and the political will to preserve an urban-like infrastructure were lost, and an unprecedented internal migration process from rural to semi-urban and urban areas was set in motion.

Until 1990 Mongolia oriented itself politically toward policies emanating from Moscow, and nowadays the country directs its attention to Brussels, Canberra, Manila, Tokyo, New York, Washington, or wherever else the headquarters of international donors are based. As mentioned in the previous section, this reorientation in "space" (Nóvoa and Lawn 2002) is crucial for our study on the politics and economics of policy borrowing in Mongolia. In particular, the shift from internationalist (socialist) to international external assistance has had more of an impact on educational reforms in Mongolia than any domestic developments, and it is a recurring theme underpinning our analyses.

Though culturally an outlier within Central Asia, Mongolia's educational reforms both before 1990 and after have been entirely in line with what other socialist or postsocialist countries have been experiencing. Since the next chapter reflects on the uniqueness of educational development in Mongolia, we take the opportunity in this introductory chapter to highlight some of the similarities with other postsocialist countries.

An anecdote might be an illustrative prelude to the more systematic analysis to come. In July 2004, we attended a memorable meeting of nongovernmental organizations, mostly staff members of policy centers, representing over 15 postsocialist countries, funded by the Open Society Institute (Soros Foundation). The meeting was held in Tbilisi, Georgia, and the Georgian Deputy Minister of Education delivered the keynote address. She listed all the accomplishments of her government over the past decade: extension of schooling from 10 to 12 years leading to a school entrance age

of 7 rather than 8 years, reduction of the number of subjects in the school curriculum, introduction of new subjects (English and computer literacy), student-centered learning, electives in upper secondary schools, standardized student assessment, reorganization of schools by either closing down small schools or merging them with well-equipped large schools, decentralization of educational finance and governance, liberalized regulations for textbook publishing, and private sector involvement in higher education.

The audience nodded. What was unfolding in front of their eyes was a "post-socialist reform package" (Silova and Steiner-Khamsi 2005), traveling across the entire region of Central, Eastern, and Southeastern Europe, Caucasus, Central Asia, and Mongolia, not to mention their own country as well. The "traveling policies" (Lindblad and Popkewitz 2004) had the same objective—the transformation of the previous Soviet system of education into an international model of education—designed by international financial institutions and organizations. This model was imposed in a few cases, but for the most part it was, in subtle ways, voluntarily borrowed for fear of "falling behind" internationally.

At the Tbilisi meeting, the participants noticed that there seemed to be a "canon of technical assistance" (Stolpe 2003: 168) that international donors systematically pursue in their respective countries. Their educational sector reviews are not only similar in analysis, but they are also strikingly alike with regard to prescribed reforms (see Samoff 1999). For example, all countries experienced a dramatic reduction in public expenditures on education as a percentage of GDP, a professionalization of education authorities and school directors, and privatization of higher education, to name only a few features of the postsocialist reform package exported to the region. This regional package is supplemented with a few country-specific reforms, such as an emphasis on post-conflict education for war-torn countries, or on gender and education for Muslim countries. The participants in Tbilisi also noticed that several areas were only marginally reformed, such as in-service teacher training, preschools, rural education, or inclusive education targeting students with special needs. This left these fields wide open for nongovernmental organizations.

Our case studies of traveling reforms are not singular instances applicable to the Mongolian context only. As we demonstrate in the concluding chapter, the same package of "best practices" has been transplanted to 33 other postsocialist countries, and prior to the 1990s, to other low-income countries that depended on grants and loans from international donors. Mongolia, as unique as it is culturally, shares a lot in common with other countries of the former socialist space who have been forced to orient themselves toward new political and economic allies. In some cases, the reorientation of the government does not move beyond lip service, and amid much fanfare, a "flag of convenience" (Lynch 1998: 9) is hoisted to secure international funding. Once funding has been obtained, the money is used for other purposes, sometimes for domestically developed reforms. How the government actively and creatively deals with global pressure, and what it signals to international organizations as opposed to what it conveys to its

own domestic constituents, is at the heart of our analysis. Deciphering both semantic fields in Mongolian educational reform—the discourse geared toward international allies and the one targeting its own population—promises to illuminate the economic and political reasons for policy import. To do so, one needs to master the languages of the different target audiences, that is, both Mongolian and English.

## THE PERSPECTIVE

In their Preface to *Empire*, Michael Hardt and Antonio Negri identify the "modern imperialist geography of the globe" as follows:

Most significant, the spatial divisions of the three Worlds (First, Second, and Third) have been scrambled so that we continually find the First World in the Third, the Third in the First, and the Second almost nowhere at all. (Hardt and Negri 2000: xiii)

Mongolia was a part of the socialist Second World until 1990 when that world crumbled. Is the Second World really "almost nowhere at all" (Hardt and Negri 2000: xiii), or should we perhaps revise this spatial dimension to include postsocialist countries?

In the years after the fall of the Soviet Empire, social science researchers distinguished between capitalist countries ("old democracies") and countries in transition ("new democracies"), assuming that all former socialist countries would eventually, after a period of transition, become converted to full-fledged capitalism. Starting in the mid-1990s, scholars noted that several practices from the socialist past endure in the present (Barkey and von Hagen 1997). Katherine Verdery (1996: 227) sharply criticized "the teleology of transition" that prescribes what needs to happen for a country to fully embrace a market economy. By the end of the first decade of post-Soviet independence, critics of transitology studies boomed in all disciplines and fields of the social sciences. In comparative education, the linearity of the transition argument came under fire (Cowen 1999), correcting earlier interpretations: If educational developments in the post-1990 period come across as chaotic, it has perhaps more to do with the linearity of our interpretations than with actual reality. Cowen's work is an invitation to reflect on the "rules of chaos" (Cowen 1999).

While, as Christian Giordano and Dobrinka Kostova (2002: 74) cynically note, the "orphans of transitology" have moved on to study "democratic consolidation," a group of social anthropologists have gathered to reflect on what it would entail to apply a postsocialist rather than a transitology perspective (see Hann 2002). For example, renowned scholar of Buriatia and Mongolia, Caroline Humphrey (2002a), addresses the importance of enlarging our analytical framework beyond the "transition" period to gain a more comprehensive understanding of developments in the post-1990 period.

Humphrey states,

It would be perverse not to recognize the fact that people from East Germany to Mongolia are making political judgments over a time span that includes the socialist past as their reference point, rather than thinking just about the present trajectory to the future. (Humphrey 2002a: 13)

We side with Humphrey's assertion that the legacies from the socialist past do not persist in current infrastructures, or political and administrative-bureaucratic practices alone, but they also function as a cultural lens through which all new innovations and reforms are seen and evaluated.

Finally, there are many commonalities between postsocialist countries that deserve a comparative scrutiny, such as the transfer of the postsocialist educational reform package mentioned earlier in this chapter. For Humphrey (2002a), postsocialism is more than simply a construct, it is a comparative research paradigm that leads us to extend the temporal and spatial dimension of our research. Translators often content themselves with reiterating or recycling other authors' descriptions of the events and developments in the post-1990 period, which supposedly have been ruled more by shock and chaos than anything else. Postsocialist studies, on the other hand, apply a longitudinal perspective that encompasses the periods before and after 1990. Spatially, this research paradigm challenges us to draw our attention to other educational systems with the same socialist past, and makes us stop believing that Mongolia's educational development in the post-1990 period has been in any way unique.

The linguistic connection between postsocialism and postcolonialism is not incidental, and there exist two parallels between these two research paradigms. In both cases, the "post" signals a historical period as well as a research angle from which the socialist or colonial map of current practices is uncovered. Verdery (2002) takes the analogy a step further and demands that the history of colonialism should be rewritten to include a more sophisticated analysis of imperial rule; this is an analysis that is detached from black and white conceptions reminiscent of the Cold War. A post-Cold War history of colonialism would explain, for example, why Cuba and Mozambique voluntarily joined the Soviet Empire to demonstrate their independence from other states. Such a project would also enable historians to scrutinize the different imperial strategies. Moscow was not about the accumulation of capital extracted from dependent states; the strategy was much more surreptitious. It aimed at a control of the means of production in dependent states, generating economic interdependence within the Soviet Empire. These are not petty semantic nuances of imperial strategies. Rather, they are essential for making sense of where Mongolia was situated with regard to its larger Second World (-system).

More than two decades after the end of the Cold War, one is surprised to see how deep historical studies on socialist systems are still entrenched in conceptualizations and language inherited from the Cold War. For all their failings, socialist systems valued free and universal access to social services,

including education and health care. One would therefore expect that the socialist accomplishment of providing universal access to education for a population that, in Mongolia, is both widely dispersed and mobile would be at least acknowledged. On the contrary, many researchers are soaked in skepticism about anything that functioned well in the former socialist period. For them socialist educational systems were rotten to the core, coercive, and only put in place to systematically and effectively indoctrinate citizens. Of course, not all researchers are as graphic in their clichés as the researcher who asked us the following question in an e-mail:

I am constructing a theory about how reforms outside of the education sector contributed to the successful development of socialist education. Thus far I have been unable to find anything about how much of a role coercion played in getting families to send their kids to school. It is apparent to me that the socialist government was not above explicitly coercive methods. To your knowledge, were any physical/violent methods used to get kids to enroll in socialist schools? (e-mail communication November 9, 2004)

In reviewing the post-1990 literature on Mongolia, we came across many authors, like the one just cited, who are tainted with conceptions reminiscent of the Cold War. Whereas this group of authors would make us believe that the socialist past is a nuisance that is wished to be completely purged from all current practices, there is an even larger group of authors celebrating Mongols as the last survivors of a species that still engages in shamanism and nomadism. Speaking in a language of redemption, theirs is the project to rescue Mongolian traditions and nomadic lifestyle in light of the rapid urbanization in Mongolia.

## THE RESEARCH

Reflecting on one's role as a researcher and justifying one's legitimacy to write on behalf of others, has in the last 20 years or so become justifiably a predicament for researchers who work internationally (see Clifford and Marcus 1986). Each of us has spent at least two years in Mongolia, stretched over a long period of time, and we both bring a different perspective to this collaborative book project.

For Gita Steiner-Khamsi the first encounter with an imported educational reform in Mongolia was in 1998, the year standards-based curriculum reform was introduced. More than two dozen visits followed, mostly as a lead advisor for educational programs of the Mongolian Foundation for Open Society (MFOS),<sup>1</sup> but also twice for the World Bank, and once for the Rural School Development Project of the Danish International Development Assistance program (DANIDA). The two projects for the World Bank entailed analytical work and research, first a Sector Note on access and quality in Mongolian education, and then a Public Expenditure Tracking Survey (PETS) dealing with financial leakages in the Mongolian education

sector. The Mongolian National University of Education awarded her an honorary doctorate of education in January 2005. A policy analyst and comparative education researcher who previously worked in other countries, she got involved, and stayed involved, in Mongolian reform projects not purposefully but rather due to a series of lucky coincidences.

Ines Stolpe first visited Mongolia at a critical moment in 1992, when the first sector review was being developed. She completed her Masters degree with a dual major in Mongolian studies and comparative education at Humboldt University in Berlin. In 1997, she enrolled for a semester at the Mongolian National University in Ulaanbaatar, a partner university of Humboldt University, and in 1998 she conducted her first extensive field study on education and nomadism. A Mongolist and comparative education researcher, Stolpe's dissertation deals with rural education in Mongolia and examines, among other things, the transformation of the boarding school system for children of nomadic herders in the 1990s (see chapter 9). In 2004, she was a co-evaluator with Gita Steiner-Khamisi and Amgabaazar Gerelmaa of the large Rural School Development Project that successfully supports 40 schools in remote rural areas and is funded by DANIDA. Having grown up socialist in East Berlin, and having first learned about Mongolia from the sympathetic perspective of another "fraternalist state," she is able to provide a perspective on educational reforms that precedes the postsocialist period of the 1990s. She wrote chapters 2, 3, the first part of chapter 4, and has had a major input in chapter 9.

Two reform projects, both funded by MFOS, have left their deep marks on this book: The project "School 2001" (1998–2001), which included 72 schools nationwide and supported school-based in-service training, peer mentoring, and peer training. The second project, "Teacher 2005" (2002–2005), established school-university partnerships and strengthened, among other things, educational research at the Mongolian National University of Education.

The voucher study, presented in chapter 8, emerged within the context of the School 2001 project, when it suddenly dawned upon the Mongolian project director Perenlei Erdenejargal and the coordinator Natsagdorj Enkhtuya that something was going wrong with the voucher reform: the Ministry of Education reported that the vouchers for in-service training were distributed, but none of the teachers from the 72 partner schools had ever held a voucher in their hands.

The Teacher 2005 project promoted empirical educational research in mixed research teams composed of university lecturers from the Mongolian National University of Education and teachers from selected schools. The research teams were located in four provinces (Bayan-Ölgii, Khovd, Dornod, Arkhangai) and in Ulaanbaatar. While the Teacher 2005 project generated a total of 15 empirical studies, we only include findings from those 4 studies in which we served as principal investigator or researcher, respectively. Our involvement covered all stages of research—design, data collection, analysis, interpretation, and publication. Table 1.2 lists the empirical studies which we frequently refer to in chapters 5–9.

Table 1.2 Empirical Studies Used in the Book

Name of Study	Research Team	Location of Data Collection	Data Base
School-Related Migration	G. Steiner-Khamisi, I. Stolpe S. Tümenelger	Dornod province-center and 12 rural districts	Interviews in 12 (out of 14) districts and in province center: • Teachers and principals from 19 schools (in 12 districts) • 34 herder family households from 12 districts
Pedagogical Jokes and Classroom Management	G. Steiner-Khamisi Kh. Myagmar B. Sum"yaasüren	Bayan-Ölgii, province-center, Ulaanbaatar	Questionnaires, individual interviews, focus group interviews, observation in classrooms: • 124 third year students of preservice teacher education • 26 lecturers of didactics, pedagogy, psychology of preservice teacher education • 20 practicum coordinators and clinic professors at schools
Class Monitor	G. Steiner-Khamisi O. Kuliyaş	Bayan-Ölgii, province-center Ulaanbaatar	Questionnaires, individual interviews, focus group interviews, content analysis of note books of class monitors: • 39 former and current class monitors in Bayan-Ölgii • 48 former and current class monitors in Ulaanbaatar
Teachers as Parents	G. Steiner-Khamisi D. Tümenembrel E. Steiner	Övörkhangaï province-center and 1 rural district, Arkhangai province-center and 1 rural district	Questionnaires and individual interviews in 2 district schools and 2 province-center schools: • 65 questionnaires • 44 individual interviews

Besides these four studies, explicitly designed as research projects, our examination of educational import has also been informed by numerous program evaluations that we conducted on behalf of MFOS and DANIDA. All research projects and program evaluations were carried out in close cooperation with the Mongolian educational researchers listed in Table 1.2 or mentioned earlier, and entailed meeting with teachers, students, parents, and education authorities across the country.

For traditionally oriented comparative education researchers, there is the question of whether involvement in a project ("technical assistance"), and research, should be separate. This question has troubled us for quite some time, and we came to the conclusion that the divide between *real* researchers (detached) and *applied* researchers (involved) (see Elias 1987), or the distinction between comparative researchers (First World) and development researchers (Third World) has become anachronistic. There is a lot of space between doing large-scale quantitative research (OECD- or IEA-type research) at one extreme and conducting ethnographic studies at the other. One needs to be neither entirely detached nor completely involved. Over the course of our involvement in Mongolia, we took on conflicting roles as



advisors, evaluators, and researchers. More often than not, we were participants rather than observers in Mongolian educational reform, and became *involved researchers* who neither were, nor wanted to become, detached from what was going on in Mongolian education reform. This high level of personal involvement in the object of study was both an asset and a liability. We soon became marked as “experts” of Mongolian educational reform.

The expert status had many advantages and one disadvantage. Our status led government officials and staff in international and local NGOs to openly share their concerns and ask us for advice regarding ongoing reforms or projects. Furthermore, the close collaboration with Mongolian researchers and practitioners helped us to identify research questions that satisfied our own academic curiosity and were at the same “hot issues” in the Mongolian policy context. Although the focus of our inquiry was on an institutional analysis of reforms (see Escobar 1995), we depended heavily on Mongolian colleagues to interpret the linguistic nuances used by officials to pronounce and enact an educational reform. Finally, a very practical asset of our role was unrestricted access to information, policy documents, and statistical material that otherwise would have been difficult, if not impossible, to obtain.

It is very important to us that our analyses are shared with, and read by, the educational research community in Mongolia. The findings from the four empirical studies mentioned earlier were translated into Mongolian, published in various research journals, and also compiled as an edited volume (Steiner-Khamsi 2005a). Writing for Mongolian readers, we refrained from theorizing globalization, mostly because these academic debates are unfortunately not fully accessible in the Mongolian language. Rather, our Mongolian publications addressed very concrete policy-relevant issues, such as the overcrowding of schools in urban and semi-urban centers (leading to three shifts rather than the customary two shifts in teaching), problems with retaining students and teachers in remote rural areas, the “statistical eradication” of dropouts from official statistics, or the low salary of civil servants that forces teachers to generate additional income by engaging in all kinds of parallel economic activities, including private tutoring and demanding gifts from parents. A few findings from these studies were discussed in the media and generated a heated public discussion on education development in Mongolia.<sup>2</sup> As a result, we have become known as reformers who study reforms. Besides triggering a public reflection on what went right and what went wrong in educational reforms of the past decade, we were also determined to solicit feedback on our studies and ensure that our interpretations were not offtrack.

Having listed a few advantages of being involved researchers, we also owe the reader a reflection on the disadvantages. Perhaps, the greatest liability of being regarded as an “expert” was the authoritative nature attributed to that status. In Mongolia, expert opinions are beyond contestation or criticism. We found ourselves being treated as “founders of discursivity” (Foucault 1984: 114) who establish the “truth” about educational reform in Mongolia, no matter how wrong the interpretations might have been. At times, we found

ourselves being treated as “indigenous foreigners” (Popkewitz 2000: 10), in that we were seen as devoid of any cultural affiliation and used as uncontested external voices to legitimize national reforms in Mongolian education. Therefore we had to periodically reassert our role as researchers who depended on receiving feedback from Mongolian scholars and practitioners. We had to insist on being corrected for all our misunderstandings or biased interpretations that may have resulted from our distant perspectives.