

# How NGOs React

*Globalization and Education Reform  
in the Caucasus, Central Asia, and Mongolia*

EDITED BY

IVETA SILOVA AND GITA STEINER-KHAMSI

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*The book documents OSI Open Society Institute's (OSI) contributions to education change in the Caucasus, Central Asia, and Mongolia which are the results of the project submitted by the coalition of the Open Society Institute/Soros Foundation and spin-off NGOs from Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Mongolia, Tajikistan, and Uzbekistan. The project has been administered by the International Institute for Education Policy, Planning and Management (EPPM) and supported by the Open Society Institute (OSI) with the contribution of the Education Support Program of OSI Budapest.*

  
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ISSA	International Step by Step Association
JICA	Japanese International Cooperation Agency
KOICA	Korea International Cooperation Agency
MDGs	Millennium Development Goals
MEA	Mongolian Education Alliance
MFOS	Mongolian Foundation for Open Society
MOECS	Ministry of Education, Culture and Science (Mongolia)
OBE	outcomes-based education
ODA	official development assistance
OECD	Organisation for Economic Co-operation and Development
OSCE	Organization for Security and Co-operation in Europe
OSGF	Open Society Georgia Foundation
OSI	Open Society Institute
OSIAF	Open Society Institute Assistance Foundation
PEAKS	Participation, Education, and Knowledge Strengthening (USAID-funded project)
READ	Rural Education and Development (Mongolia)
RSDP	Rural School Development Project (Mongolia)
RWCT	"Reading and Writing for Critical Thinking" (OSI)
SAP	structural adjustment program
SbS	"Step by Step" (OSI)
SFK	Soros Foundation-Kazakhstan
SIDA	Swedish International Development Cooperation Agency
TAN	transnational advocacy network
TICA	Turkish International Cooperation Agency
UN	United Nations
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USAID	United States Agency for International Development

## Introduction

# Unwrapping the Post-Socialist Education Reform Package

IVETA SILOVA AND GITA STEINER-KHAMSI

The authors of this book have taken on the ambitious task of examining educational development during a particular historical moment in the Caucasus, Central Asia, and Mongolia. The period under investigation begins in 1992, when new funders—development banks and bilateral donors—entered the region. The organizations of the United Nations system, in particular the United Nations Educational, Scientific, and Cultural Organization (UNESCO) and the United Nations Development Programme (UNDP), had been the only international organizations that bridged both world-systems during the Cold War. Thus, they were not newcomers but rather reinvented themselves in response to the new challenges of the post-Soviet or post-socialist era. In the mid-1990s, shortly after the appearance of international aid in the region, the international NGOs opened field offices or national foundations. By the end of the 1990s, all segments of the donor community were represented, their agendas set, and contours of educational development clearly discernible. The authors end their retrospective with the year 2007. Because of their past or current professional association with the national foundations of the Soros Network, the authors of this book naturally present their assessment from the perspective of NGOs. In an attempt to identify patterns of educational development in the region, we have taken a step back to reflect on why some educational reforms have emerged only in one or two countries, whereas others have spread rapidly across the region. Globalization only partially explains why educational systems have in some areas converged

toward an international model of educational reform. Globalization in the context of donor-dependent countries is not a vaguely defined, faceless “external force.” Rather, it is represented by international organizations operating as donors and implementers of reform projects. This “globalization with a face” is the focus of our interest.

Not all educational systems, however, have been reformed in the same manner, and differences persist. An international comparative perspective is needed to identify “traveling reforms” that have been transferred to every corner of the world, including in the Caucasus, Central Asia, and Mongolia. But it is also necessary to use a regional, as well as a national, lens to detect the actual differences that exist with regard to education development. A trifocal perspective—international, regional and national—will bring to light reform areas that had been susceptible to convergence or divergence, respectively, and help us to understand the enacting forces, that is, the agencies and reasons, for educational transfer across the region.

From a regional perspective, it is puzzling to discover what we label a post-socialist education reform package. The package was transferred to the region after the collapse of Soviet Empire. From Baku to Ulaanbaatar, educational policymakers have used remarkably similar education reform rhetoric, consisting of the following package: extension of the curriculum to eleven or twelve years of schooling, introduction of new subjects (for example, English and computer literacy), student-centered learning, electives in upper-secondary schools, introduction of standards and/or outcomes-based education (OBE), decentralization of educational finance and governance, reorganization (or “rationalization”) of schools, privatization of higher education, standardization of student assessment, liberalization of textbook publishing, and the establishment of education management and information systems. The package also includes some country-specific features such as emphasis on female education in Muslim countries, and post-conflict education in the areas afflicted by wars and civil unrest.

However, it is important to supplement the regional focus with an international perspective. The emergence of practically identical education reform packages in the Caucasus, Central Asia, and Mongolia has several causes. The most basic has to do with the history these countries share. Not only were their educational systems

shaped by Soviet educational policies and, with few exceptions, very similar until the early 1990s, but these countries also experienced structural reform policies administered by the same international donors (World Bank, Asian Development Bank, U.N. organizations) in the early and mid-1990s. In a few cases the post-socialist education reform package was imposed. In most of the countries in the region, however, it was voluntarily borrowed out of fear of “falling behind” internationally (Steiner-Khamsi and Stolpe 2006, 189). In other words, some of the features of the package are not restricted to the region. From an international comparative perspective we can see elements of it in other countries where structural adjustment policies had been imposed.

Finally, a national perspective is necessary to understand how international and regional reforms encounter local realities, as well as how national institutions selectively draw on experiences from other countries. Even though international consultants are sometimes caught mixing up countries, peoples, and currencies, the countries of the region were not a *tabula rasa* when international organizations began to draw attention to them. How the reforms of the 1990s and the new millennium interacted with institutions and practices that had been in place is an important question. Which reforms were resisted, which were enthusiastically embraced, and which were selectively implemented in the varied national contexts are topics of investigation that require area-specific knowledge. This knowledge has helped us to sharpen a national lens on educational development.

In an attempt to capture distinctive voices, unique histories, and local meanings, the chapters in this book pin down the post-socialist education reform package at the country level, reflect on the outcomes of reform, and examine various NGO responses to educational change. We focus on one of the largest and most influential NGOs in the region—the Open Society Institute and Soros Foundation Network. We examine Soros’s role in alternatively supporting, complementing, or correcting post-socialist reforms in the education sector. In instances where there is a reform vacuum—such as Uzbekistan and Turkmenistan—we study the network’s role in providing a substitution for direct change. This book chronicles the educational interventions of the network of national Soros Foundations by considering the remarkable repertoire of strategies used to build “open societies” in the centralist

(in some countries also repressive) post-socialist governance contexts, of the Caucasus, Central Asia, and Mongolia, while also addressing the larger issues of complex relationships among NGOs, state, and donors in international education development.

### Agenda-setting by international donors

For the majority of countries in the Caucasus and Central Asia, independence came suddenly and unexpectedly as a consequence of the collapse of the Soviet Union. In fact, some scholars have argued that most of these countries were “forced into independence,” whether they wanted it or not (Ibrayeva 2003, 156; Jones Luong 2004; Bremmer and Taras 1996).<sup>1</sup> Since then, the newly independent countries have moved along distinctly different trajectories of post-socialist transformation. To varying degrees, all of them have been affected by unemployment, falling wage levels, increased poverty, and the social problems that have accompanied the post-socialist transformation processes. Some experienced armed conflicts in the early 1990s.<sup>2</sup> Some countries—Armenia, Georgia, the Kyrgyz Republic, and Mongolia—attempted to adopt democratic political reforms with open elections in a multi-party system. The rest of the countries in the region—Azerbaijan, Kazakhstan, Tajikistan, Turkmenistan, and Uzbekistan—have increasingly settled into authoritarian or semi-authoritarian regimes.

For all the diversity to be found in the Caucasus, Central Asia, and Mongolia, these countries share a common story. Not only did they emerge from the same socialist past, but they also have been subject to similar external influences since the collapse of the Soviet Union in 1991. External influences came most visibly in the form of foreign aid, which boomed in the early 1990s, and then escalated further at the start of the millennium. By the beginning of 1992, the largest international agencies—such as the United Nations, World Bank, International Monetary Fund (IMF), European Bank for Reconstruction and Development (EBRD), Asian Development Bank (ADB), and OSCE—had already conducted assessment missions to the Caucasus and Central Asia. They also began preparing for the establishment of a permanent presence (Gleason 1997).

At the same time, bilateral cooperation was launched through national foreign aid agencies such as USAID, the Japanese International Cooperation Agency (JICA), the Canadian International Development Agency (CIDA), Turkish International Cooperation Agency (TICA), DANIDA, die Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ), and many others. In addition, private foundations and philanthropies such as the Open Society Institute and Soros Foundation Network and the Aga Khan Foundation were established in most countries in the region. Finally, an army of international NGOs, including Save the Children, Mercy Corps, Academy for Educational Development, CARE, and others, arrived to assist in democratization efforts.

Each and every international organization has its own country assistance strategy. Where these organizations operate and what they fund reflects, more often than not, organizational logic rather than local needs. There is an established research tradition within international comparative education, started by Brian Holmes, to dissect “donor logic.” Written during the era of the Cold War in 1981, Holmes found that, regardless of circumstances, British and American experts almost always favored the introduction of a decentralized system of educational administrators, whereas Soviet and German Democratic Republic experts always recommended the introduction of polytechnical education in countries they advised.

An analysis of donor involvement in Mongolia illustrates this concept. Whereas the donor logic of the ADB and the World Bank is finance driven, the logic of bilateral aid agencies is self-referential in a different way. The bilateral agencies of the German and Danish governments—GTZ and DANIDA—selectively export “best practices” from their own educational systems that are supposedly missing or underrepresented in Mongolia. For example, German consultants have felt compelled—not only in Mongolia but also in many other countries—to contribute to vocational education. Meanwhile, Danish experts focus on small schools and students with special needs. Once the Americans got involved under the auspices of the Millennium Development Fund, their specialists emphasized English-language and information-and-communication technology (ICT) reform in Mongolia. The decision of what to support in the Mongolian educational sector is driven more by what the lender has to offer than what the borrower actually needs. There has been

a “gentlemen’s agreement” among development banks in Mongolia that has softened over the past three years. Until 2004, the World Bank took the lead, with the support of UNDP and many other donors, in poverty alleviation and other social-sector programs. Meanwhile, it stayed away from educational reform, because the ADB was recognized as the “lead donor” in the educational sector.

Asian donors, particularly JICA and the Korea International Cooperation Agency (KOICA), are infrastructure and resource oriented (“hard-type” aid), but have not yet become involved in “soft-type” aid, such as the reform of content or methods in education. Both have shipped technical equipment for radio, TV, and video-conferencing studios, as well as computers (some of which are secondhand) to educational institutions. Perhaps one of the most fascinating criterion for selecting target countries is the one used by the government of Switzerland: only countries that are mountainous and small (for example, Kyrgyzstan, Tajikistan) receive Swiss aid. As bizarre as this may sound, it is not uncommon for bilateral donors to give aid to countries they perceive as being similar to their own (see Alesina and Dollar 2000).

It is important to bear in mind that despite the massive increase in aid over the past fifteen years, the Caucasus and Central Asian region has been considered a low priority for international donors. An international perspective might be helpful here. An analysis of funding patterns provides a glimpse into the close link between aid and foreign policy. The so-called Greenbook, periodically compiled by USAID for the U.S. Congress, is a valuable source for analyzing funding priorities and target countries of the U.S. government. The Greenbook lists figures on U.S. overseas loans and grants under three categories: economic assistance (USAID grants and loans, Food for Peace, Peace Corps, etc.), military assistance (Military Assistance Program, International Military Education and Training Program, etc.), and other U.S. government loans (export-import bank loans, direct loans, etc.).<sup>3</sup> Judging from the statistical information (USAID 2001), the Middle East has constituted the highest priority for the U.S. government. Israel was by far the largest recipient, followed by Egypt. Israel has received US\$81 billion since its creation, and Egypt has received US\$53 billion since the early 1970s. Another country regarded as a high priority was South Vietnam. During its short existence it received US\$24 billion in the

form of U.S. grants and loans. In contrast, the entire sub-Saharan African continent has received only US\$31 billion between 1945 and 2001 (Westad 2005, 156).

Alberto Alesina and David Dollar (2000) take their analysis of statistical information on loans and grants a step further, by presenting a multivariate analysis of donor strategy that considers trade openness, democracy, civil liberties, colonial status, direct foreign investment, initial income, and population of the target countries. Their analyses are not restricted to U.S. government loans and grants but include all donors from market economies. They find that former colonial empires (in particular, Portugal, the United Kingdom, France, Australia, Belgium) spend more than half of their external aid on their former colonies. From 1970 to 1994, Portugal channeled 97 percent of its aid to its former colonies. In comparison, the United Kingdom allocated 78 percent, France 57 percent, Australia 56 percent, and Belgium 54 percent of their external funding to former colonies. Another variable, being a “U.N. friend,” also proved important for donor selection of target countries. This variable measures whether the target country has voted in line with the donor at U.N. conferences. It accounts for Japanese funding patterns in the post-Cold War period. In the past decade Japan directed funds to poor countries in return for a vote on admitting Japan as an additional member of the U.N. Security Council. Although Alesina and Dollar’s regression analyses cover all bilateral donors, their findings confirm the trend reported earlier for the U.S. government. Of all the strategies that bilateral donors employ to select target countries, political and economic interests overshadow all other considerations.

To return to our regional focus and address the donor logic of international organizations, we would like to comment briefly on U.N. organizations. It is necessary to distinguish between the two U.N. players in education, UNICEF and UNESCO. Phillip Jones has scrutinized the donor logic of multilaterals (Jones 1998; 2004) and found great differences, depending upon how they are funded. He points out that UNICEF relies on voluntary donations from governments, private foundations, or individuals, and therefore “its analyses of need tend to be dramatic, its projections tend to be alarmist and its solutions tend to be populist” (Jones 1998, 151). In contrast, UNESCO runs on membership fees that are, unfortunately, more successfully extracted from low-income governments than they

are from high-income governments. Given the global scope of UNESCO's operation, supported by minimal funding, little ends up left at the country level. As mentioned before, UNDP and UNESCO are trusted organizations because they have had a presence at times when other international organizations shied away from, or were not given access to, the region. Despite the low budget of UNICEF and UNESCO, they succeed in mobilizing funds from other donors, and in recent years have engaged in more analytical work and policy analysis. In most countries of the Caucasus, Central Asia, and Mongolia, for example, UNESCO's reputation is so great that some projects are erroneously attributed to UNESCO even though they are funded by others.

We conclude this reflection on donor logic with a few observations on NGO logic. NGOs are, in terms of policy studies, "transnational epistemic communities" (Haas 1992; Rose 1993). They believe in a cause and advance it at every opportunity. In organizational terminology the term *mission* is used rather than the terms *episteme*, *belief*, or *cause*. The mission of the OSI, for example, has been to advance open societies in countries where the founder, George Soros, and his board of directors identify the greatest need. The receptiveness to "open society values," used interchangeably throughout the 1990s with "civil society building," was particularly great in countries with a strong state and a weak public. UNICEF, despite its classification as a multilateral organization, also sometimes presents itself as an international NGO, or an "epistemic community." This is because UNICEF promotes a specific cause or agenda, such as a "rights-based approach" to education. For multilateral and bilateral donors, the need of a government for external financial assistance is sufficient reason to start up operations in a country. Different from these large donors, international NGOs depend on a "policy window" (Kingdon 1984); that is, they rely on an opportunity or a turn of events in which the mission of the NGO is likely to resonate. The political transformations in the early 1990s that demanded a stronger civil society involvement in public affairs represented a window of opportunity for the Soros Network. The next chapter will address in greater detail the donor logic of Soros and demonstrate how it has undergone various manifestations over the course of the past twenty years or so.

Foreign aid to the region increased after the tragic events in New York on September 11, 2001. While a growing number of international donors were primarily interested "to support development, promote democracy and buttress stability" (OSI 2002), others were worried about the potential for Muslim fundamentalism. International development assistance has become so vast and varied that ministries of education in most countries have had to create special units responsible for keeping track of education activities initiated by different international organizations (Silova 2005). As Eugene Rumer, the former Clinton administration official in charge of Eurasian affairs, observed, the events of 9/11 have put Central Asia on the frontlines of the global war on terrorism and produced

new winners and losers in and around Central Asia: Central Asia itself has been the big winner. The world cares about the region and has focused its attention on it to the degree unimagined in the 1990s. The reason the world cares is not that Central Asia has nuclear weapons left over from the Soviet Union, as it did in the early 1990s, or because of oil and gas, as it did in the mid-1990s, or because of human rights campaigning by NGOs as it did in the late 1990s. The world cares about Central Asia for two reasons: proximity to the South Asian tinderbox; and belated realization on the part of the Western political establishment that failed states cannot be left to their own devices indefinitely, no matter how remote or irrelevant they may be. (Quoted in Rumer and Yee 2002, 8)

Following the flow of foreign aid, a growing numbers of international consultants arrived to the region. Some cynical observers of education reform in the region described these international experts as outsiders who "borrow your watch to tell you the time" (Bassler 2005, 165). Almost unanimously, international experts and agencies insisted educational systems in the region were approaching a "crisis situation." This was clearly expressed in the titles of some of their numerous field reports—*A Generation at Risk: Children in the Central Asian Republics of Kazakhstan and Kyrgyzstan* (ADB 1998), *Youth in Central Asia: Losing the New Generation* (International Crisis Group 2003), and *Public Spending on Education*

in the CIS-7 Countries: *The Hidden Crisis* (World Bank 2003), *Country Analysis Mongolia: Transition from the Second to the Third World?* (SIDA 1998), along with many others.

Practically every education sector review rushed to point out the alarming indicators of crisis: falling expenditures, declining literacy rates, decreasing enrollment, rising student dropout, deteriorating capital infrastructure, outdated textbooks, stagnated curricula, and a lack of qualified teachers. Most reports concluded that educational systems had become less equitable, with students from rural areas and low socioeconomic levels increasingly marginalized. In the case of Turkmenistan, and increasingly Uzbekistan, curricula had become dominated by ideological indoctrination and characterized by cults of personality. Furthermore, educational systems across the region had been corroded by endemic corruption. Combined, the challenges associated with the post-socialist transformation processes made it practically impossible to provide basic education for all children, let alone to undertake a fundamental reform of the national educational systems (Silova, Johnson, and Heyneman 2007).

For the people of the Caucasus, Central Asia, and Mongolia, realization of the impending "education crisis" was tragic. People felt their educational systems had been better under socialism. As the International Crisis Group (2003, ii) put it, "In a world where many people expect progress with each generation," most youth in Central Asia and the Caucasus were actually worse off than their parents after the collapse of the Soviet Union. In this context, many people began to talk nostalgically of their educational experiences during the socialist period, often referring to the Soviet system as "the good old" one (Belkanov 2000, 86).

International development assistance has begun systematically to target the educational sectors of the countries in the Caucasus, Central Asia, and Mongolia to solve the educational crises and save "the generation at risk." With the exception of Turkmenistan (which did not allow any international interference in the education sector), every country has been subject to a myriad of international education-assistance projects. Similar to aid relationships in any context, education system reforms have been driven primarily by the agendas and procedures of the funding and technical assistance agencies (Samoff 1999, 249). Notwithstanding the diversity of local contexts and the variety of international agencies funding

education reform initiatives, the proposed recommendations for saving "the generation at risk" have been carefully framed within the internationally recognized discourses of Education for All (EFA), Millennium Development Goals (MDGs), and other internationally accepted benchmarks of education development.

### Education for All for all countries?

It is striking that the trajectories of educational development, described in the previous section, have remarkably little in common with the directions inscribed in international agreements such as EFA, MDGs, and the Fast-Track Initiative (FTI). The reason is simple. The EFA Agreement, established in 1990, and the international agreements that followed were not meant specifically to address the situation in post-socialist countries. At the time, in fact, the post-socialist region was not on the map of recipient governments. As a corollary, the emphasis of international donor agreements has been on basic education, which, with the exception of a few bilateral aid agencies, is narrowly defined as primary school.<sup>4</sup>

A brief comment on this history of educational development in the post-socialist region illustrates how inappropriate the primary-school focus of EFA has been. EFA, defined as universal access to basic education (eight or nine years of schooling) was declared a priority at the 22<sup>nd</sup> Congress of the Communist Party of the Soviet Union in 1961. The 25<sup>th</sup> Congress finally declared basic education, that is eight or nine years of schooling, mandatory for socialist educational systems. Having systematically pursued universal access to education throughout the 1960s, the Communist Party went on to develop a four-year plan for the modernization and quality improvement of basic education for the period from 1971 to 1975. In reviewing the educational research literature from former socialist countries, one finds frequent references to the lack of student motivation and lethargy in schools that should be addressed with more active teaching methods (e.g., Sandshaasüren and Shernossek 1981; see also Steiner-Khamsi and Stolpe 2006, chap. 2). Throughout the region, laboratory schools were established to test new teaching methods. Such schools continue to be affiliated with pre-service teacher-training institutions. The need for more student-centered

teaching was a recurrent theme throughout the 1970s and 1980s in the former Soviet region.

There were two features, in particular, that socialist educational systems claimed as their own: universal access to education and lifelong learning. Socialist comparative-education literature abounds with accounts of how these two features are lacking in “bourgeois” education, not only in developing countries but also in the capitalist First World. Perhaps the most graphic illustration of the Marxist-Leninist review style was the edited booklet on the 18<sup>th</sup> General Assembly Meeting of UNESCO (Gerth 1975). The editor, Ilse Gerth, a government official in charge of international relations in the German Democratic Republic (GDR), selected controversial topics and prepared response essays on four topics:

- The theory of the “world educational crisis”
- The bourgeois conception of lifelong learning
- The terminology and feature of “innovation” in educational planning and activities
- The bourgeois position on “immigrant workers” (Gerth 1975, 3)

For example, Gerth (1976a) dismantled “the world educational crisis” as a bourgeois construct and requested that the imperialist member-states speak for themselves. There was no educational crisis in socialist countries. On the contrary, socialist countries had superior systems in place, because socialism shielded the educational sector from the types of crises to which capitalist countries were exposed. Another vehemently attacked UNESCO term was the concept of permanent or lifelong education. Marxist-Leninist educational researchers (Széchy 1986; Gerth 1975) resented the selective borrowing of a concept that was saturated with socialist conceptions of education. Lifelong learning was quintessentially socialist. Not only did socialist systems deserve to be credited for having successfully implemented the notion of lifelong learning, but it must be acknowledged that high-quality lifelong learning requires a political, economic, and social environment—socialist—where the practice would be truly valued:

Only the socialist educational system, which includes pre-school, school, after-school, as well as all stages of post-secondary

education, provides the necessary foundation for lifelong learning of high socialist quality. The socialist society implements the teachings of the founders of Marxism-Leninism in practice by conceptualizing learning as a lifelong process. (Gerth 1975, 42)

Research on multilaterals and the U.N. system in particular has only begun to reflect on the Cold War era. With easier access to archival material in both world-systems, past accounts of important historical events are in need of reexamination. As mentioned in previous publications (Steiner-Khamsi 2006; Steiner-Khamsi and deJong-Lambert 2006, 89), the role of socialist countries in leading events such as the 1974 UNESCO Revolution has not been sufficiently investigated. Although Phillip Jones (1998, 2004) and Karen Mundy (1999) report in some detail on the demand for a new international economic order that was put forward during the 18<sup>th</sup> General Assembly Meeting in 1974, they tend to reduce the Revolution to a shift in power relations between first- and third-world countries. A singular event, the election of Amadou Mahtar M’Bow from a third-world country (Senegal) to secretary general in 1974 has been overemphasized as an explanation for why the United States, the United Kingdom, and Singapore left the organization a decade later.<sup>5</sup> Other events during the 1974 meetings of the General Assembly that hint at the politicization of the organization, such as the UNESCO resolution against the Chilean military junta or against the Israeli occupation of Arab territories, deserve equal consideration. As Gerth, GDR comparative education researcher and government representative for multilateral organizations, noted in her report on thirty years of UNESCO, the 18<sup>th</sup> General Assembly Meeting was a breakthrough for socialist countries (Gerth 1976b). The majority of member states finally recognized, after years of insistence by the first three socialist members (USSR, Ukraine, Belarus), “the need to understand the political dimension of educational issues” (Gerth 1976b, 356).

Even though the revolutionary changes of the early 1990s were a step forward politically—installing a multi-party system—they also meant two steps back for educational development. Several African countries for which EFA was primarily designed also shifted their priorities to secondary-school development. The education sector strategies of Kenya and Uganda, to provide just two examples,

identify lower-secondary school, rather than primary school, as their primary reform goal. Nevertheless, the “Africanization” of aid, reinforced most recently in the EFA FTI, has had major repercussions for the post-socialist region. Since loans and grants are predominantly given for primary-school reform, the ministries of education in the region had to reframe their needs in terms of this particular sub-sector. In a region where gross enrollment ratios for primary school are between 80 and 100 percent (UNICEF 2006), this is easier said than done.

In order to secure a grant or loan, the ministries of education had first to learn to speak the language of the international donors. For example, what the Ministry of Education of Mongolia really needed and demanded was external financial assistance to rehabilitate its deteriorating dormitory-school system and build more school facilities in urban and semi-urban areas. This would curb emigration from rural areas and remedy overcrowding. What it received instead from the ADB were measures to enhance the “quality of education” in schools based in regional centers and towns.

Prior to the EFA FTI, funds were not made readily available for capital investments. Demands had to be phrased in terms of “quality of education” needs.<sup>6</sup> Ministries of education also had to familiarize themselves with the new philosophy of aid; it was necessary to emphasize needs, not accomplishments. They had to convey a graphic sense of educational crisis to attract external funding. Furthermore, it was not sufficient to point to the need for *modernization* of the educational system. Donors wanted to hear the term *reform*, suggesting a revamping of structures that were in place. After years of using ineffective strategies to attract international donors, the ministries of education finally learned to belittle their own accomplishments and instead emphasize how far their system lagged behind other countries. These new tactics were diametrically opposed to what ministries of education had been socialized to do for decades, that is, to proclaim that the goals set for the five-, seven-, or nine-year plan had been accomplished ahead of schedule. Competition among “fraternal” socialist states to accomplish their multi-year educational plans gave way to competition over who was furthest away from “international standards” in education.

Nowadays, ministries of education are socialized to declare their multi-year educational plans or, to use the contemporary term, their *education sector strategy* to have failed in order to legitimize grants

or loans. Such tactics have little to do with the actual reality of educational development. A typical communist slogan—We had five years to accomplish the plan, but we did it in four!—and the post-socialist strategy of exaggerating shortcomings are equally misleading. The victory of the laggards nowadays derives from the need of donors to have a grant or a loan approved by their own board of directors. The governments, as beneficiaries of loans and grants, assist the donors in their difficult predicament of having to make a case for funding. The donors must justify their portfolio by emphasizing why a commitment should be made toward one country at the expense of others.

In order to establish a need for external intervention or funding, the ministries of education sometimes tamper with statistics. Dropout statistics in Mongolia provide a good example of how data varies depending on the source. It also shows how ministries of education retroactively manipulate information to match their policy agenda (see Steiner-Khamsi and Stolpe 2006, chap. 9). Similar to other former socialist countries, the official statistics in Mongolia underreport dropouts and perpetuate the myth that the dropout problem, after peaking in the early 1990s, is subsiding. This “statistical eradication” of dropouts from official records, however, is only half the story. The rest is even more intriguing and reveals the retrospective fabrication made possible through the mismatch of figures provided by different government sources. The difference between the figures provided by the Ministry of Education/National Statistical Office (11,953 dropouts), and the Human Rights Commission of Mongolia (68,115) is by far the largest. Surprisingly, there is also a big difference between reports by two departments within the same ministry. The non-formal education department reports 40,000 dropouts, while the department in charge of educational statistics at the Ministry of Education reports only 11,953.

These vast discrepancies suggest that the various government agencies may send different signals to different constituencies. The Ministry of Education and the National Statistical Office are accountable to the general public as well as to international financial institutions that have subsidized educational reform over the past fifteen years. However, the Non-Formal Education Department at the Ministry of Education and UNICEF are seeking additional funds for financing non-formal education programs for dropouts. Their

price tag must reflect the large number of potential participants (40,000) who would be served in non-formal education programs. The newest spin on dropout statistics in Mongolia was during the EFA FTI assessment in 2005. International consultants helped “prove” that drop-out during primary school is, especially for poor boys in rural areas, an issue that must be systematically addressed.

Besides tampering with statistical information, the ministries of education also had to learn to become “policy-bilingual”: stating one thing to their own political constituency and another to donors. Gender equity in education, one of the MDGs, is a good case in point. In Mongolia, for example, the gender parity index is in favor of girls, yet the MDGs assume that girls are educationally disenfranchised. What to do? In 2004 the Mongolian government used the media to broadcast the need to introduce affirmative action favoring males for teacher education to combat discrimination against young boys. The assumption was that if boys had male teachers as role models, they would do better academically. Yet, the technical reports and recommendations produced by international consultants (see ADB 2004) and approved by the government of Mongolia emphasized the need to combat gender discrimination (of women) at the higher levels of education (M.A. and Ph.D. levels).

This is not to downplay issues of primary-school completion in the post-socialist region. Children who do not enroll in schools (termed “left-outs” by UNICEF) or who drop out after the first grade do exist, and their numbers have increased over the past fifteen years. The reasons for dropout or left-out children are multifold. They relate to the rising cost of private education and the high opportunity cost of attending schools in rural areas where children (especially boys) are used for labor in agriculture or animal husbandry. Last but not least is the lack of provision for children with special needs. It has only been in the last two to three years that ministries of education have been forced to draw more attention to inclusive education. Throughout the 1990s, EFA goals were discussed in the abstract, with very few effective strategies to enhance access for poor children or children with special needs.

We are not alone in pointing out the absurdity of universal benchmarking and target-setting. Individual governments must comply in order to receive external assistance, no matter how irrelevant the standards are. Jonathan Jansen (2005) provides a detailed

policy analysis of the fallacies embedded in target-setting, and Michael Clemens, Charles Kenny, and Todd Moss (2007) criticize the MDG framework for using the same yardstick to measure “development success” across a wide variety of national contexts. But the difference between what international benchmarks determine in terms of educational development and what the actual realities are is perhaps nowhere as great as in the post-socialist region.

As mentioned before, the post-socialist region did not exist when EFA was conceived in 1990. As latecomers to the EFA world-system, the thirty-plus governments in the region perhaps never took these international plans and agreements seriously enough to criticize them. They simply reframed their needs in terms of the agreements and spoke the language of the donors to obtain the necessary financial support. More analytical support by international NGOs would have helped steer international agreements in a direction that would have benefited, or at least not harmed, educational development in the post-socialist region. It is only in the last few years that international NGOs and U.N. organizations have started to get involved in more comprehensive strategic and analytical work and to leave behind their exclusive concentration on single issues, such as civil society building (OSI), child-friendly schools (UNICEF), or inclusive education (Save the Children U.K.).

In sum, there is a huge gap between the goals of EFA and MDG, and the reform package that was implemented during the early stages of the post-socialist period. The gap is a result of the policy bilingualism mentioned earlier; the ministries learned to speak the language of the donors to secure a loan or a grant for reforms. But once the funding was secured, the money was channeled into other “modernization” projects, which, as the following description of the post-socialist reform package will illustrate, were quite similar across the region.

### The post-socialist education reform package

In our review of reforms in the Caucasus, Central Asia, and Mongolia, we were inspired by Joel Samoff’s astute observation of education sector reviews in African countries (Samoff 1999). He noticed that most education sector reviews start out with a statement that education in Africa is in crisis. Even though the reviews

deal with different educational systems, they are “remarkably similar” in their analysis as well as in the presentation of the solution to the problem (Samoff 1999, 249). The analyses are written in a diagnostic style, provoking associations with a sick body that needs to be remedied, and the policy solutions are prescriptive, conveying a sense of uncontested authority. In concert with Samoff’s observation, we find the education sector review in the countries of this particular region also strikingly similar. They are diagnostic in their analyses and prescriptive with regard to recommendations. Similarly, most education sector reviews start out with statements such as “progress has been made,” but “efforts need to be re-doubled” to achieve the goals set out in the education sector strategy.

We draw on Samoff’s observations and propose taking his analysis a step further by scratching at the surface of the reform package, which only initially appears to be homogeneous. Upon unwrapping the package, regional and national differences surface. A closer examination requires use of a trifocal lens: an international, regional, and national focus. The features of the post-socialist education reform package are unique in that they combine (1) elements common to any low-income, developing country that implements the structural adjustment programs (SAPs) recommended by the international financial institutions, (2) education reform aspects specific to the entire former socialist region, and (3) country- or region-specific components (see Table 1). Although these features vary from place to place, they do exist (at least discursively) in most countries of the region. As mentioned earlier, the only exception is Turkmenistan, which, until the death of President Niyazov in 2007, did not allow any international cooperation in the area of education and was completely isolated from international influence.

#### *Features related to the structural adjustment programs*

The first part of the post-socialist education reform package consists of features related to the implementation of SAPs initiated by international financial institutions. There are typical not only of the Caucasus, Central Asia, and Mongolia, but also of many other developing countries. Since the mid-1990s, all countries in the region (with the exception of Turkmenistan) accepted large loans for the restructuring of the educational sector and subsequently became subject to certain terms and conditions. For example, the World

**Table 1.**  
*Features of the post-socialist education reform package*

#### FEATURES RELATED TO THE STRUCTURAL ADJUSTMENT PROGRAMS

- **Reduction of public expenditure on education**  
Lowering public expenditures for education in terms of educational spending as a percentage of total public spending and in terms of educational spending as a percentage of the GDP.
- **Increase of private spending on education**  
Introduction of formal fees in private schools, universities, and noncompulsory levels of education, encouraging community contributions towards financing of school facilities, introducing payments for textbooks, school meals, and extracurricular activities.
- **Decentralization of education finance and governance**  
Increasing cost effectiveness and efficiency by decentralizing education finance (including financial autonomy at school level by introducing per capita financing) and by enhancing social accountability and participation.
- **Rationalization of school staff and reorganization of schools**  
Rationalization (or optimization) of school staff and buildings to increase the efficiency of spending in the education sector. Rationalization reforms usually include improvement in teacher-to-student ratios, rationalization of school staff (for example, firing “redundant” auxiliary teachers and technical support staff), reorganization of schools (for example, closure of small rural schools and merging of several smaller schools in cities and regions into large, complex schools).
- **Increase of internal efficiency by reducing “wastages” and leakages**  
Detailed analyses of public expenditures and tracking expenditures at the various levels of government in order to identify areas where money is inefficiently used, misallocated, or lost (leakage).

#### FEATURES RELATED TO THE INHERITED SOCIALIST LEGACIES IN EDUCATION

- **Education extension to eleven or twelve years**  
Extension of general education curriculum—from ten to eleven or twelve years of schooling—has been generally undertaken in order to realign the former socialist educational systems with the Western education standards. Most countries referenced the Declaration of the Council of Europe (1992),

which stated that twelve-year education was the most widely used worldwide and was necessary for the international recognition of secondary education certificates by universities abroad.

- **Curriculum standards (OBE)**

Introduction of curriculum standards has been generally associated with a new approach to curriculum reform. Moving away from an exclusive focus on knowledge acquisition prevalent during the Soviet period, new curriculum standards have been introduced to redistribute subject matter among competencies and learning areas. In short, the reform involves a shift from remembering facts to understanding and applying the learned material. Introduction of curriculum standards is often perceived as a tool for quality enhancement in education.

- **Standardized assessment systems (centralized university entrance examinations)**

The introduction of standardized testing for school-leaving and/or university admissions has been primarily used as a measure to curb corruption in education. It marks a shift from the traditional practice of oral examinations administered by individual educational institutions to a more transparent assessment of students' knowledge and skills.

- **Market-driven textbook provision**

Issues surrounding textbook reform generally concern breaking away from the old, centralized system of textbook provision to a more open, fair, and competitive publishing market. The goal is to increase the quality of textbooks by de-monopolizing authorship, stimulating competition among publishers, and providing a choice of textbooks and teaching/learning materials for students, teachers, and schools.

- **Increased educational choice (private schools)**

To signal a retreat from a state monopoly over education, the post-socialist governments have widely advocated for increased choice in educational provision. This has involved the establishment of private schools across the former socialist region.

- **Student-centered learning**

Introduction of student-centered learning is a prototypical example of a reform that has been implemented to signal "democratization" of teaching and learning at the classroom level. The introduction of these "new technologies"—cooperative learning, group work, individualized learning—have aimed to soften the traditional teacher-led approaches common to Soviet education practice.

- **Community schools**

The concept of community schools has been introduced as a measure to increase community participation in education. Activities may also include service provision for the community offered by the school, turning community-participation projects into income-generating activities.

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## FEATURES RELATED TO COUNTRY-SPECIFIC OR REGION-SPECIFIC NEEDS

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- **Girls' education**

Several Muslim countries of Central Asia (Uzbekistan, Tajikistan) and the Caucasus (Azerbaijan) have experienced decreasing enrollment rates for female students since the collapse of the Soviet Union. This has resulted in the introduction of various initiatives aimed at improving girls' access to education.

- **Conflict resolution/peace education**

In the early 1990s, conflict resolution and peace education were among the most typical components of the education-reform packages in countries experiencing civil unrest and/or war (for example, Armenia, Azerbaijan, Tajikistan). By the end of the 1990s, however, this reform component had lost its urgency and now has been entirely displaced in some countries.

- **Turkish schools**

Signaling the importance of new geopolitical alliances, a network of Turkish schools has emerged in the Turkic-speaking countries of Central Asia (Kazakhstan, Kyrgyzstan, Turkmenistan, and Uzbekistan) and the Caucasus (Azerbaijan). These are usually private schools that have been established by the Turkish government and/or the Gülen community.

Bank and the ADB loans for education sector development projects constituted, on average, US\$40 million to US\$60 million in each country during the 1990s and 2000s. The exception was Uzbekistan, which borrowed over US\$200 million, and Turkmenistan, which did not receive any loans for education sector reform (see Table 2).

It is important to note that the most recent allocations made from the Catalytic Fund of the EFA FTI are not listed in Table 2. The EFA FTI grants were assessed, approved, and disbursed at breathtaking speed. The sums allocated to governments as part of the EFA FTI grants are mind-boggling. The EFA FTI marks the beginning of a new era in international cooperation, in which donors contribute to operational costs, downplay earlier concerns regarding sustainability of externally funded provisions, and fail to reflect on the risks of donor dependency. The EFA FTI also advances "international knowledge banks" that are fed with educational statistics

*Table 2. World Bank and ADB education sector loans to the countries of the Caucasus and Central Asia*

INTER-NATIONAL AGENCY	EDUCATION SECTOR LOAN	TIME SPAN	LOAN AMOUNT (in US millions)
<b>ARMENIA</b>			
World Bank	Education Management and Finance Reform Project	1998-2002	\$15
World Bank	Education Quality and Relevance Project (three phase education sector reform loan)	2004-2013	\$44 (est.)
<b>AZERBAIJAN</b>			
World Bank	Education Sector Reform Project	1999-2004	\$5
World Bank	Education Sector Development Project (three phase education sector reform loan)	2003-2012	\$63 (est.)
<b>GEORGIA</b>			
World Bank	Education System Realignment and Strengthening Project (three phase education sector reform loan)	2001-2013	\$60 (est.)
<b>KAZAKHSTAN</b>			
ADB	Basic Education Project	1998-2002	\$35
ADB	Education Rehabilitation and Management Improvement	1995-2001	\$20
<b>KYRGYZSTAN</b>			
World Bank	Rural Education Project	2004-2010	\$15
ADB	Community-based Early Childhood Development	2004-2009	\$10
ADB	Education Sector Development Program	1998-2004	\$37

INTER-NATIONAL AGENCY	EDUCATION SECTOR LOAN	TIME SPAN	LOAN AMOUNT (in US millions)
<b>UZBEKISTAN</b>			
World Bank	Basic Education Project	2006-2010	\$40 (est.)
ADB	Second Textbook Development	2004-2010	\$25
ADB	Education Sector Development Project	2003-2008	\$38.5
ADB	Education Sector Development Program	2003-2007	\$70
ADB	Information and Communication Technology in Basic Education	2006-2011	\$30
ADB	Basic Education Textbook Development	1998-2003	\$20
<b>TAJIKISTAN</b>			
World Bank	Education Reform Project	1999-2003	\$5
World Bank	Education Modernization Project	2003-2008	\$24
ADB	Education Sector Reform	2003-2009	\$7.5
<b>MONGOLIA</b>			
World Bank	Rural Education and Development Project	2007-2012	\$4
ADB	Education Sector Development Program	1997-2002	\$15.5
ADB	Second Education Development Project	2002-2008	\$14
ADB	Third Education Development Project	2007-2012	\$13

provided by ministries of education. Statistical information is collected for the baseline year in which the grant is being disbursed and for each subsequent year until it expires. Statistical information is gathered in order to monitor progress globally by comparing educational development in a country with internationally prescribed benchmarks of the EFA FTI Indicative Framework. Bilateral donors are placed in an interesting bind: on the one hand, they fund projects that pursue their country-specific "logic," and on the other hand, they co-finance projects funded by the development banks and multilateral organizations such as the EFA FTI. The volume of the EFA FTI grants ultimately calls into question the use of direct bilateral aid.

Arguably, the debt burden and structural adjustment policies are inextricably linked. Among other goals, the implementation of structural reforms in the education sector aimed to increase efficiency in the use of public funding as well as to reform financing and management of educational institutions. The rationale behind these reforms was to increase the chances of loan repayment through the introduction of "appropriate policies" or conditionalities (IMF 2004, 1). For the education sector this meant cutting down public expenditures, increasing private spending, decentralizing finance and governance, and increasing system efficiency (see Table 1).

For the past decade, international financial institutions in the region powered the generic two-pronged structural adjustment formula: one, generating income by charging fees or tuition; and two, reducing expenditures by privatizing educational provisions (especially in the preschool and higher-education sector) and by reducing waste. For example, Arvo Kuddo (2004) reported that the Ministry of Education in Armenia established "annual rationalization plans" to reduce the number of teachers from 46,800 in 2003, to 31,100 in 2006 (a decline of 34 percent), and non-teacher staff from 24,200 in 2003 to 21,300 in 2006 (a reduction of 12 percent). Rationalization, or downsizing of the education work force, has undoubtedly been a big success politically, even as it provokes the greatest social opposition (Kuddo 2004, 2). In Kazakhstan the school rationalization reform has resulted in the closure of 3,667 preschools (from 5,226 to 1,558) and the shutting down of 590 general education schools (from 8,694 to 8,104) during four years of reform (ADB

2004). The reform has led to a mass-scale closure of preschools and small rural schools, leaving thousands of children without any access to education.

Clearly, educational spending dramatically dropped in all post-socialist countries in the early to mid-1990s. This applies whether we use the percentage of gross domestic product (GDP) allocated to education as a measure or educational spending as a percentage of public expenditures (UNICEF 1999, 5). The picture of rapidly falling public expenditures for education is especially grim in the Republic of Georgia, where educational spending previously accounted for almost 36 percent of all government spending but within only four years (1993–97) was slashed by more than half. In 1997, the government of Georgia was able to commit less than 15 percent of its public spending to education (UNICEF 1999, 5). Despite the pressure to curb educational spending significantly, several governments succeeded in increasing the percentage of GDP allocated to it in the first few years of the new millennium (Armenia, Azerbaijan, Mongolia, and Tajikistan).

#### *Features related to the inherited socialist legacies in education*

In addition to the structural adjustment reforms, most countries also experienced education reforms that were specific to the region, and not necessarily applicable in other parts of the world. These specifically post-socialist education reform features included adaptation of the existing educational systems to the new free-market environment as well as appropriation of "international" or "Western" standards. In particular, these reforms included the extension of the curriculum from ten to eleven or twelve years of study, introduction of electives to increase the flexibility and relevance of the curriculum, introduction of choice and free-market mechanisms in education, and others (see Table 1). In most countries these reforms were introduced for the purpose of not falling behind internationally or, in the case of Kazakhstan and the Caucasus (Armenia, Azerbaijan, Georgia), to signal commitment to joining the "European education space" (Nóvoa and Lawn 2002).

For example, Heyneman (2004) outlines some reforms that were typical of the entire post-socialist region due to the uniform educational structures inherited from the Soviet Union. In particular, he

explained that some reforms included reorganization of the education governance structures in higher and vocational education to remove unnecessary bureaucratic layers within these systems and to improve flexibility of educational institutions in order to respond to rapidly changing market needs. Other reforms focused on the necessity of overcoming outdated mechanisms of university entrance—previously based on oral examinations and subject to corrupt practices in the post-Soviet environment—by introducing “more modern systems of examinations and standardized testing” (Heyneman 2004, 5). Furthermore, some reforms (especially of curriculum and textbooks) were specifically designed to substitute the “old” Soviet values with new ones, to address “the need for cultural rejuvenation and renewal” in recently established democracies (Heyneman 2004, 5).

In addition to the reforms directly related to dismantling Soviet structures, practices, and values, some education reforms were driven by the desire of some countries in the region to join the European education space. For Kazakhstan and the Caucasus, for example, European educational assistance was, perhaps, most influential in affecting education reform rhetoric. This is particularly true in relation to the introduction of such concepts as *knowledge society*, *accountability*, and *democratization* (Lawn and Lingard 2002, 299). Furthermore, European Union (EU) policies triggered the structural adjustment of the educational systems in Kazakhstan and the Caucasus, as illustrated in the extension of the school year from ten to eleven or twelve years of study, and structural changes within the higher education systems known as the Bologna Process (that is, introducing a three-level higher education program including bachelor, master, and doctoral degree programs).

### Country-specific variations

In addition to the structural adjustment reforms, which development banks indiscriminately transfer to donor-dependent countries on whichever continent the country is situated, and the regional reform initiatives (post-socialist reform package) that address educational development in this part of the world, there is a long list of reforms that are country specific. More often than not, these are not funded from external sources unless they are seen as having international significance, such as supporting a secularized version

of Islamic education in Kazakhstan, Kyrgyzstan, and Tajikistan (funded by the Turkish International Development Agency and the Gülen community).

Often country-specific reforms are prematurely dismissed as an internal issue and fail to secure external funding. In Mongolia, for example, education for children from herder families was neglected for more than a decade. Even though one-third of the population consists of nomadic pastoralists, the boarding-school system—ensuring access to children from nomadic herder families—collapsed partly because there were no best practices in nomadic education international organizations could draw upon to legitimize their own involvement. Another puzzle arises when the country-specific context is diametrically opposed to what international agreements presuppose. For example, what should international donors do if there is an “inverse gender gap” favoring girls over boys? Should they revise the international agreement or ignore the issue as an anomaly? As mentioned earlier, international donors found a niche in education where they could reinforce their theory of universal discrimination against girls. Females are outperforming males throughout the educational system in Mongolia, and educational attainment is higher for females than males. Yet, the gender gap closes in higher education. Another way of dealing with the inverse gender gap was to focus on dropouts in rural areas, who are mostly poor males.

There is a misconception among international donors that all reforms in the region are externally funded. There are numerous reforms that are designed in-country, funded from government sources, and implemented by government officials. In fact, such nationally initiated reforms are inscribed in action programs of political parties and periodically surface during election season. Just because no documentation is available in English or because no external funding has been sought does not mean these national programs or action plans do not exist.

### What is left out of the package

Any researcher who attempts to unwrap the reform packages that were transferred from one country or context to another should pause and ask what was *not* included. For international NGOs, in particular, it has been tremendously important to identify areas of reforms that are underserved. These areas fall through the cracks

because they are not given attention by governments or by large international donors. There are three areas, in particular, that have been neglected: education for children with special needs, in-service training for teachers, and participatory education governance.

For example, education for children with special needs has been strongly advanced first by Save the Children U.K. and later on by other NGOs and UNICEF. Save the Children U.K. developed and disseminated teaching material, as well as training modules on inclusive education, throughout the region. There is, in general, little government and donor interest in catering to children who are “left out” of formal education unless they fall into officially defined categories such as rural poor or orphans. Other groups of children who are entirely dependent upon NGO support include street children as well as children who lack residential registration due to rural-urban migration or internal displacement of their parents.

In-service training was identified first by national foundations of the Soros Network as a neglected area of reform. It was customary for teachers in the region to be entitled to “upgrading” or professional-development courses every five years. After the universal in-service training system collapsed only select teachers and administrators were enrolled. Priority was given to those who were immediately affected by ongoing reforms, such as primary-school teachers (extension of schooling from ten to eleven years) and school administrators (decentralization of educational finance). Funds were absorbed for these special groups, and regular teachers lost their entitlement to continuous professional development. It is striking to see that international agreements (EFA, MDG, EFA FTI) mostly focus on the recipients (students), thus neglecting the supply side in education (teachers). It is this vacuum that first the Soros Network, and then other NGOs, filled.

It is worth mentioning that some reforms were part of the package but only selectively implemented. As several of the case studies in this book (especially the case studies of Armenia and Georgia) point out, the decentralization reforms were conceived to cover both financial and governance issues. In reality, however, development banks only promoted decentralization of finance, again leaving decentralization of governance, in the form of community participation, wide open for NGOs. In the area of decentralization reforms, the Soros Network corrected or complemented ongoing reform by

funding projects that enhanced civic involvement and community participation.

### What do reforms do?

The literature on development and education addresses important questions presented in this book: Who gives aid to whom? Who deserves aid? What does aid do? The first question deals with the logic of donors as well as their mission and their target countries (see Alesina and Dollar 2000; Easterly 2002). The second question deals with conditionalities of aid, which in recent years have placed an emphasis on “good governance” (for the most recent discussion, see Dollar and Levin, 2006). The third question forces us to examine the impact of external assistance on existing practices and structures. We have tailored the third question to match the focus of this book by asking what (imported) reforms do.

Different from what is commonly assumed, reforms that are imported with the financial support of international organizations, governmental or nongovernmental, do not simply replace existing practices and structures. As the chapters in this book will illustrate, the educational reforms in the region are—despite coming from the same socialist past and having received an identical education reform “package” since independence—quite distinct. Today, fifteen years after reform packages began being transferred to the region, they have had different outcomes in different countries. Some have remained, others were reversed, and yet others moved back and forth. What is needed is a long-term perspective to evaluate how a reform was actually implemented, if it was implemented at all, and how it affected what was already in place. Only by evaluating a reform a few years after it has been in place can we see whether it has replaced, added to, or modified existing practices and structures. Our approach is to examine how elements of the post-socialist reform package have been implemented differently.

We are not the only ones who are curious about how and why the same reforms play out differently in separate national contexts. Anthropological studies also draw attention to local or national differences. Kathryn Anderson-Levitt (2003), for example, gathered a group of cultural anthropologists to reflect on whether national

systems in different parts of the world are indeed converging toward an international model of education. Different from world culture theory, associated with neo-institutionalism advanced by sociologists at Stanford University (for example, John Meyer, Francisco Ramirez), anthropologists reject such a claim and instead emphasize how global reforms are interpreted differently once they are imported or borrowed. The case studies in Anderson-Levitt's edited volume, as remarkable as they are, focus exclusively on how a global reform such as, for example, OBE, takes on different meanings in various contexts. The destiny of existing policies in light of global forces is not explicitly addressed.

It is no small feat to examine how the same reform is interpreted differently, as this tells us something about culture, particularly the culture of reform, in the various policy contexts. However, hybridization resulting from the encounter between imported and already existing policies is but one of several conceivable outcomes. Others include a replacement of previous policies or, at the other extreme, a reinforcement of what had already been in place. Again, hybridization has been amply documented (for example, Anderson-Levitt 2003), and replacement as an outcome of borrowing has also been extensively studied in societies that have undergone revolutionary changes (for example, Spreen 2004). Both strands of research view policy borrowing, or more broadly speaking, globalization, as a form of external intervention that inevitably triggers change.

For a variety of political and economic reasons, so-called external interventions are frequently internally induced when politicians and policymakers utilize the semantics of globalization to generate reform pressure. However, we are still left with cases where imported policy exclusively served to reinforce existing policies. Other than Silova's study on bilingual education policies in post-Soviet Latvia (Silova 2005) and another, smaller comparative study on OBE in Central Asia (Steiner-Khamsi, Silova, Johnson 2006), there is little in the way of empirical evidence to suggest that policy borrowing is sometimes used to legitimize and reinforce existing practices. In our small comparative study of OBE in Central Asia we confirmed Silova's earlier findings (Silova 2005) and presented an additional case (Mongolia) where the introduction of OBE merely reinforced an elaborate monitoring system by adding yet another element of teacher accountability to what had been in place for the past thirty years (Steiner-Khamsi, Silova, Johnson 2006).

The few studies that have been conducted to date focus on reforms that have been transferred by multilateral donors, that is, development banks and the U.N. system. Several international NGOs also engage in transnational reform transfer due to their dual capacity as donor and implementer. In the Caucasus and Central Asia, the network of national Soros Foundations, Save the Children U.K., the Aga Khan Foundation, and World Vision—to name just a few—also deserve closer scrutiny with regard to their reform impact. The proposed classification into reforms that augmented, corrected, replaced, or modified existing practices can therefore be extended to an analysis of reforms supported by NGOs in the region.

### *Complementing existing reforms*

Some of the reforms that NGOs advanced were simply added, either permanently or temporarily, and then ultimately dropped because they did not fit an existing structure. Civic education is a good example to illustrate an NGO-supported reform that was devoid of considerations regarding curricular constraints. What decentralization of finance is to development banks, civic education is to NGOs: a panacea to cure every problem in the educational system. OSI, USAID (Civitas), the EU and a host of other international organizations developed modules and trained teachers for civic education. The OSI package "Democracy for All," adopted from a progressive post-apartheid program, was very popular in the region because of its interactive and skills-based approach. Yet in many countries OSI civic education was competing with similar programs developed by other NGOs because, to date, there is either very limited or no curricular space for this type of initiative. In some countries civic education is part of social sciences, an area already filled by prescribed curricular content. In other countries, such as Tajikistan, civic education was squeezed into law/government studies that only allotted one hour per week of instructional time during grades eight and nine. This is far too little to accommodate one civic-education package, let alone selectively implement components from others. In fact, instructional time for law/government studies, previously occupied by subject matter that dealt with historical materialism or Marxist-Leninist theory, was drastically reduced in the 1990s, despite the efforts of NGOs to have civic education as a separate subject included in the curriculum. Ten years later, civic-education textbooks added to the regular curriculum are

used only in abbreviated versions, if at all. By competing to implement various forms of civic education into a curriculum that was already cluttered with too many subjects and too little time for instruction, NGOs undermined one another in a goal they all shared.

### *Correcting the existing reforms*

We can only speculate about why governments and large international donors have ignored in-service teacher training, because few studies have been carried out on this subject. Salaries for teachers are low, and the prestige of the profession has suffered visibly. This has resulted in tremendous teacher recruitment and retention problems. The outcome in some countries (for example, Kyrgyzstan and Tajikistan) has been a dramatic teacher shortage. Another indication of the unattractiveness of the teaching profession is the demographics of teachers: one-third to one-quarter of teachers have been in public service for more than twenty years and thus are eligible for retirement. We found a disturbing attitude toward the teaching corps in the region. Some large donors considered teachers to be a “lost generation,” not worth investing in. Donors believed teachers had been “indoctrinated” for decades by socialist methods of thinking and teaching. Intervention in the “future generation,” that is, in students at pre-service teacher education, was also considered off limits for large donors, for two reasons: first, higher-education reform is not a priority of international aid; and second, there is too much “wastage” in teacher education, given that fewer than half of the graduates in teacher education ever enter the teaching profession. As mentioned previously, this gap was first filled by the Soros Network and then by other NGOs.

### *Replacing existing reforms*

There are numerous examples of reforms that were funded and supported by NGOs that replaced previous education practices. Typically, these projects were in compliance with government plans to replace the inherited socialist educational provisions with new ones. The development of English language textbooks or world history textbooks, advanced in several national Soros Foundations, is an example of a reform that was sustained. Even in the most authoritarian countries in the region (such as Uzbekistan and Turkmenistan), government officials allowed international NGOs

to develop new textbooks and teacher-training modules to substitute for outdated teaching materials.

### *Hybridizing existing reforms*

The fourth type of policy impact is perhaps the most intriguing: NGO projects that hybridized or modified existing practices. Student-centered learning is a prototypical example of a reform that was forcefully advanced by all NGOs in the region and locally adapted to the cultural context. It did not replace teacher-led instruction but rather “softened up” traditional ways of teaching by including elements of student-centered learning. Teachers who participated in the numerous in-service teacher training workshops on student-centered, interactive, or cooperative learning—or the OSI versions of it, Reading and Writing for Critical Thinking (RWCT), Debate, or Step by Step (SbS)—embraced these so-called new technologies. They reported that their students were more engaged as a result of these methods and that they themselves had learned about individual students’ needs and abilities. They subsequently implemented methods of student-centered learning in their teaching and student assessment, but only selectively.

For cultural, environmental, and structural reasons, student-centered learning means something different in the context of Caucasus and Central Asia. Culturally, teachers are respected for their knowledge. Situations in which students might ask questions the teacher cannot answer are carefully avoided. In our classroom observations in Mongolia, for example, we noticed that student-led group work was used only to consolidate knowledge that had already been transmitted by the teacher. Environmentally, student-centered learning in the form of student independent research or student project work played out differently in a context where there is very limited access to books or other sources of written information. Finally, there are structural reasons that constrain the systematic implementation of student-centered learning. The two main obstacles are the current student assessment methods and the current teacher-salary structure.

These two constraints are explained in greater detail here, because they are indicative of valuable project work, funded and implemented by NGOs, that lacks systematic integration into broader policy-related issues. First, individual student progress, as advanced in student-centered learning, is not part of the government-approved

assessment repertoire. Students are exposed to quizzes and, at the end of each cycle, to standardized tests. Group work or individual student progress is not evaluated, especially in lower- and upper-secondary school.

Exceptions are worth mentioning here. The National Scholarship Test (university entrance exam) in Kyrgyzstan—funded by USAID and directed by a former trainer in RWCT—measures student skills rather than just student knowledge. The test attempts to expand the emphasis on student skills into the lower levels of secondary schooling. Another example is OBE in Mongolia. In principle, teachers are supposed to measure individual student progress throughout the year and take notes on each student. Yet this principle is not enforced because teachers lack the time, commitment, and knowledge to do so. The salary structure for teachers also undermines student-centered learning. Teacher salaries are, as outlined in greater detail in the concluding chapter, below the national average. Teachers need to work additional hours or take on additional jobs to make a living, leaving them with very little time for lesson preparation and student feedback.

To make things worse, salary contracts are structured in a way that confines the salary of a teacher to his or her actual teaching hours. All additional pedagogical activities (such as grading student notebooks) are reimbursed separately. During Soviet times the statutory teaching hours for teachers (*stavka*) was twenty-four hours for primary-school teachers, and eighteen hours for lower- and upper-secondary school teachers. The two core features of the *stavka* system—base salary based on the hours taught, with supplements for additional pedagogical activities—were the defining characteristic of the Soviet teacher-salary system that has been in effect since 1948. The peculiarities of the *stavka* system have always been a topic of great academic curiosity and professional interest in non-socialist countries. They were well-documented in English, especially during the Cold War (see, for example, Bereday and Schlesinger 1963). Not much has changed over the past sixty years except for a gradual decrease of the statutory teaching hours (in the past fifteen years) to accommodate the necessity of having a second job or teaching additional hours. Any other pedagogical activity, including grading student notebooks or providing feedback on written assignments, is still paid additionally. Not only is formative student evaluation not

seen as part of the teacher's job (and compensated for financially), but not all teachers are entitled to this supplement. In the post-Soviet region only teachers of language, math, physics, and technical drawing are entitled to the notebook-checking supplement (Steiner-Khamsi 2007). The assumption is that other subjects, such as history, geography, biology, etc., are "soft subjects," with little preparation required by students or formative evaluation required by teachers. In Tajikistan, the supplement for notebook-checking is 20 percent of the base salary. This supplement is too substantial to be neglected by NGOs that have advanced student-centered learning since, by default, student-centered practices result in more formative student assessment and "notebook checking."

The examples provided in this chapter lead us to suggest that NGO-funded projects, as progressive as they might be and as enthusiastically embraced by practitioners as they have been, are not sustainable if they ignore broader policy issues such as, for example, curriculum or teacher salary reform. This applies especially to the Caucasus and Central Asia, where educational practices are regulated in great detail by centralist governments. It is therefore not surprising that NGOs in the region, including the national Soros Foundations, have in recent years attempted to influence educational policy on a larger scale.

### A preview on the retrospective

This book examines a unique post-socialist education reform package at the country level by focusing on the role of the OSI and the national Soros Foundations in education reform in the Caucasus, Central Asia, and Mongolia. It reflects on the outcomes of the implementation of the reform package and illustrates a dynamic interaction among various actors—states, donors, and NGOs—in education change. These multiple perspectives are used to introduce an analytical rather than a merely descriptive element into the country-specific case studies. The history of each OSI national foundation will be provided as important background information and supplemented with an overview of, and reflection on, the role of NGOs (including OSI) and civil society building in the corresponding countries. This book highlights the diversity of OSI's responses to education reform and consolidates past experiences, while challenging

readers to look at the Caucasus, Central Asia, and Mongolia as unique and dynamic countries.

Following Iveta Silova's overview of the history of educational programming in the OSI and the national Soros Foundations (that is, OSI donor logic) in Chapter 1, the book features nine country-level case studies. Each case study highlights a particular feature of the post-socialist education reform package and reveals the complexity of the sociopolitical, historical, and educational contexts within which international reforms take root. Chapter 2 by Armenuhi Tadevosyan examines the evolution of the *community education schools* concept in Armenia and the role of the World Bank and international NGOs in institutionalizing the initiative in education reform. Chapter 3 by Elmina Kazimzade focuses on international efforts to develop a free textbook-publishing market in Azerbaijan. Kazimzade examines the different perspectives of the government, World Bank, and OSI with regard to textbook reform, uncovering a large rift between vision and reality. In Chapter 4, Anna Matiashvili discusses another feature of the post-socialist education reform package—education decentralization in the Republic of Georgia during the early 2000s. The chapter examines the complex interaction of various actors—the government, World Bank, and the Open Society Georgia Foundation (OSGF). Matiashvili offers a unique analysis of the various factors that account for the selective institutionalization of reforms and discusses the complex conditions under which governments neglect initiatives developed by local NGOs and import ideas from elsewhere.

Chapter 5 by Saule Kalikova and Iveta Silova examines the introduction of OBE in Kazakhstan. Unlike similar curriculum-reform projects funded by international financial institutions across the former socialist region, the OBE reform in Kazakhstan was initiated and implemented locally. This chapter discusses how international NGOs (such as the Soros Foundation-Kazakhstan) had to readjust their strategies to exert influence on Kazakhstan's educational policymaking in an increasingly "donor-free" environment.

In Chapter 6, Alexander Ivanov and Valentin Deichman focus on one of the most ambitious pilot projects of the Soros Foundation-Kyrgyzstan, which aimed at the introduction of the voucher-based teacher training system as a mechanism to improve the quality of in-service teacher training and to offer teachers a choice in selecting professional development courses. The authors reflect on

the role of NGOs in generating reform pressure and on opportunities for scaling up the pilot in the future.

Teacher-education reform in Mongolia is discussed by Natsagdorj Enkhtuya in Chapter 7. The chapter deals with a specific type of transfer—cross-institutional borrowing or best practices—and examines the conditions and reasons international donors and NGOs borrow education reform projects from one another and implement them in the same country. The chapter focuses on a project initiated by the Mongolian Foundation for Open Society (MFOS) and its subsequent adoption by other international development agencies in the country.

In Chapter 8 on Tajikistan, Tatiana Abdushukurova reflects on the role of the Open Society Institute Assistance Foundation (OSIAF) in supporting local policy capacity in education reform. She examines the emergence of an independent, locally run organization—Education Reform Support Unit—and its attempts to enter the education policymaking arena in an environment heavily dominated by international donors and subject to strict government control.

The last two case studies provide a unique opportunity to examine reform strategies pursued by international NGOs in some of the most authoritarian countries of the region. Chapter 9 on Turkmenistan by Erika Dailey and Iveta Silova highlights different approaches to education reform—working with the government or implementing education reform initiatives beyond governmental control—and reflects on the complexities and contradictions involved in pursuing both approaches. Chapter 10 on Uzbekistan by Jacqueline Ashrafi examines the legacies of two education programs funded by the OSIAF—the textbook-development program and the in-service teacher-training program—that were miraculously able to survive after the closure of OSIAF in 2004. Following analysis of the education reform context and the role of international NGOs during the transformation period, this chapter reflects on the strategies used by OSIAF to promote open society values through education despite the increasingly authoritarian nature of Uzbek government.

The concluding chapter by Gita Steiner-Khamsi invites readers to step back and reflect on similarities and differences in the post-socialist education reform package across the region. By reviewing a range of strategies used by NGOs to cope with centralist governments,

on the one hand, and international donors, on the other, she proposes distinguishing between different strategies of NGOs in dealing with the post-socialist education reforms. She identifies, in particular, three types of NGO-government relations in the post-socialist region. Drawing on case studies presented in the book, she discusses the three types of relationship: the complementary role of NGOs, the cooperative role of NGOs, and the surrogate role of NGOs. The final section of the chapter briefly comments on scaling up strategies of NGOs discussed in the research literature. The Soros Foundation has scaled down the budget for educational projects considerably and at the same time established education policy centers that are expected to scale up the political impact of the Soros Network. Another development highlighted in the chapter is the move from a post-socialist network to a global network in education. These recent developments within the Soros Foundation—scaling up (politically) by scaling down on project expenditures and the intention of going global—are followed with great interest, not only by professionals closely associated with the Soros Network but also by scholars and students in NGO research.

The case studies presented in this book provide detailed contextual information that is necessary to investigate the interplay of various policy actors. This contextualization is indispensable for understanding what a particular reform means in a country and why a reform is supported by some and opposed by others. These country-specific perspectives enable us to engage in a contextual comparison and help to identify similarities and differences in how NGOs, and the national Soros Foundations in particular, have responded to reforms that have been transferred to the Caucasus, Central Asia, and Mongolia.

### Notes

<sup>1</sup> For example, the Central Asian republics—Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan—were the last ones to declare their independence from the Soviet Union. With the exception of President Askar Akayev in Kyrgyzstan, the leaders of the Central Asian republics supported the coup against Mikhail Gorbachev in August 1991, and an overwhelming majority of the population in these republics voted to remain part of the Soviet Union (Jones Luong 2004; Bremmer and Taras 1996).

<sup>2</sup> For example, armed conflicts broke out in the Caucasus (including the Nagorno-Kharabakh conflict between Armenia and Azerbaijan in 1988–94 and Georgian-Abkhaz conflict in 1990–94) and in Central Asia (including ethnic clashes in the Ferghana Valley in 1989–91, and the civil war in Tajikistan in 1993–95).

<sup>3</sup> It deserves special mention that the most recent Greenbook on U.S. overseas loans and grants (USAID 2004) blurs the line between military and economic assistance. Expenditures previously listed under military assistance are now listed under economic assistance, accounting for a US\$1.4 billion shift from military to economic assistance in fiscal year 2003 (USAID 2004, v).

<sup>4</sup> USAID, for example, defines basic education as primary and lower-secondary education. In contrast, the multilateral organizations (U.N. organizations and the development banks) restrict basic education to four-to-six years of primary schooling.

<sup>5</sup> The U.S. government only resumed UNESCO membership in 2003 as part of its global alliance in the war on terrorism.

<sup>6</sup> It is astounding how, without much debate, the EFA FTI has reversed the earlier approach of focusing on soft-type aid, which was conducive to quality enhancement throughout the 1990s. As educational experts in Mongolia remark, the multi-million-dollar project appraisal for EFA FTI Mongolia resembles more a plan of a ministry of construction than a ministry of education.

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## 1

## Championing Open Society

*The Education Logic of the Soros Foundation Network*

IVETA SILOVA

Since the collapse of the socialist bloc in 1989, the international community has responded “with considerable fanfare and significant resources” to support post-socialist transformation processes in the countries of Southeast and Central Europe and the former Soviet Union (Quigley 1997, 2). Initiatives have ranged from large-scale programs developed by international financial institutions (World Bank, ADB, IMF) and multilateral organizations (UN, EU, OSCE) to smaller projects launched by international NGOs and private foundations. Collectively, these international development agencies aimed to promote a market economy, liberal democracy, and civil society.

In devising their responses, each agency was driven by its own “donor logic,” mirroring its mission and objectives. This donor logic was systematically advanced in its target countries (Steiner-Khamsi and Stolpe 2006, 73). For example, the donor logic of international financial institutions was primarily “finance driven,” whereas the donor logic of multilateral organizations emphasized “democratic governance” and “rights-based” approaches to international development (Steiner-Khamsi and Stolpe 2006; Quigley 1997). By contrast, many international NGOs were preoccupied with the idea of civil society and the concept of social capital, based on the logic that “funding local advocacy NGOs would help to build independent interest groups in civil society that in turn can provide impetus for democratic reforms” (Adamson 2002, 178; see also Lewis