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I. Global Trends in Education and Vocational Education and Training
GITA STEINER-KHAMSI

Education Policy in a Globalized World

We are currently witnessing a busy creation of reforms that are initiated across national boundaries at all levels of educational systems. Policy transfer in vocational-technical and continuing education is no exception. This has been reflected in relevant scholarly research. An early book on policy transfer, *Something Borrowed? Something Learned?* (Finegold, McFarland & Richardson, 1993), was published in the field of vocational-technical education. Yet another example is Gonon’s 1998 work on policy reception, which is a seminal treatment of why vocational-technical reforms of one country have been emulated by others (Gonon, 1998).

The fact that educational reforms were increasingly adopted across national boundaries has been a cause for celebration for some and a source of anxiety for others. The idea that countries are abandoning efforts to realize local and idiosyncratic conceptions of “good education” or “effective school reforms” in favor of converging around an international model of education has generated a heated academic debate. One of the most frequently offered explanations is the following: once the barriers for global trade are eliminated, we will import and export anything, including educational models. Since the trajectory of global trade tends to be unidirectional – transporting educational reforms from high-income to low-income countries, but rarely the other way around – educational systems in different parts of the world are increasingly becoming similar. Whether we label policy borrowing as the transfer of “best practices” (which in many countries have been reframed in the meantime as more modest “good practices”), or as adaptation of “international standards,” the idea of *éducation sans frontières* mystifies many researchers and academics. This has in turn prompted considerable scholarly attention to the international convergence of national educational systems since the late 1990s.
Arguably, vocational-technical education is vulnerable to transnational policy borrowing because the pressure to adapt so-called international standards, however defined, is typically generated through references to the global economy. Precisely because the comparative advantage of national economies is frequently understood in relation to the quality of its workforce, reforms in vocational-technical education, possibly more than in any other field of education, are doomed to be tailored after reforms in the educational systems of countries seen as more ‘competitive’ or ‘productive.’ We should therefore pause and think of the question, put forward by Dolowitz and March (2000, p. 14): “when we are analyzing policy change we always need to ask the question: is policy transfer involved?” The relevance of this question applies especially to reforms that, at first sight, look strikingly similar.

Modern Schooling: A Good Example for Globalization in Education?

Scholars with a neoinstitutionalist orientation, notably the renowned Stanford University sociologist John Meyer and his associate Francisco O. Ramirez, investigate why educational systems and beliefs in different parts of the world have become remarkably similar. They identify the universal adoption of structures, concepts, and beliefs associated with “modern schooling” as evidence for isomorphism. Drawing on longitudinal studies spanning over a period of a hundred years or more, they conducted that educational systems have, over time, converged not only towards the same “world standards” with regard to the structure, organization, and content of education (Meyer & Ramirez, 2000, p. 120), but also towards the universal values of progress and social justice. Ramirez writes,

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

These “common ways of envisioning and interpreting the realities” of schools (Ramirez, 2003, p. 247) is, according to neoinstitutionalism – also referred to as world culture theory – manifest at all levels of the educational system. Perhaps one of the boldest assertions of isomorphism is the neoinstitutionalist interpretation of the TIMSS and TIMSS-R data, put forward by David Baker and Gerald LeTendre:

If current trends persist, what happens in a classroom in Seoul, Paris, Santiago, Cleveland, or Tunis will be remarkably similar, most likely even more so than now. In the near future, curricular content for standard subjects such as mathematics and science, for example, will hardly vary at all cross-nationally. The globalization of curricula and its implementation in classrooms will exert a soft but steady pull on nations toward a world norm, to the point where little variation in curricula exists across nations. What differences remain will be mostly across schools within nations for intentional reasons and some idiosyncratic variation introduced by teachers (Baker & LeTendre, 2005, p. 177).

It is certainly noticeable that notions such as “world-class education” or “international standards in education” have become powerful concepts to the extent that national policy makers subscribe to them enthusiastically for fear of “falling behind”. These broad terms capture a wide variety of practices, such as girls’ education, lifelong learning, student-centered teaching, standards-based education and a slew of other practices that, as world culture theorists suggest, reflect in one way or another the broader values of social justice and progress. The OECD, the World Bank, the UN system and other transnational regimes act as institutions that advocate for “best practices” reflecting these broader universal values, and fund their implementation in poor countries. Although each international organization disseminates and funds its own favoured practices, the overall set of such travelling reforms are almost identical, leading neoinstitutionalist scholars to suggest that the isomorphism is indicative of a bigger transformation process. What has emerged over a period of hundred years or more is a universally held model of modern schooling.

At the heart of the neoinstitutionalist assertion of convergence is a genuinely sociological conception of modern schooling. As a project of modernity, the “modern school” serves nation-building and for that reason subscribes to values of social justice and social cohesion. This particular view of schooling, however, is not substantially
different from other frameworks developed within the sociology of education. Regardless of the school of thought, it is generally maintained that modern schooling has two functions with respect to the modern nation-state, namely vertical and horizontal integration: horizontally, schooling contributes to nation-building by strengthening social cohesion among the various social groups, whereas the vertical function of schooling is supposed to facilitate social mobility.

The functionalist approach to modern schooling depicts society figuratively as a pyramid, with elites forming the top segment and the masses constituting the base. In the modern nation-state, the status of an individual is ostensibly to be determined by education, merit, perseverance and other features associated with achievement. That is to say, the primary vehicle for “vertical” social mobility education has supposedly replaced status ascriptions, based on gender, class, ethnicity, etc., that are assigned at the moment of birth. Some educational systems do better than others with regard to vertical integration. Systems that commit to vertical integration implement, for example, grant needs-based scholarships, engage in outreach efforts, or enforce affirmative action plans that benefit disenfranchised groups. Needless to say, scholars have criticized the vertical integration function as a powerful myth with little correspondence in actual practice. They have highlighted correctly that educational attainment and class correlate strongly, and what modern schooling has accomplished effectively is a perpetuation of the myth of meritocracy whereby the social status of an individual is supposedly based on human capital rather than other forms of capital—financial, social, and cultural—inherited at birth.

The horizontal integration function of modern schooling is also subject to criticism as it entails the teaching of one language, one history, and one curriculum in an attempt to unite a population that is diverse and possibly divided. As others have pointed out, the problem with the nation-state is the hyphen between the two words or concepts, respectively. In other words, problematic is the idea that there should be one (homogenous) nation in one state. Again, a critical counter-perspective is much needed here because what some see as social cohesion others consider oppression, assimilation, and normalization.

The past forty years have seen major theories emerge with the sole purpose of laying bare the myths perpetuated by the project of modernity, including myths surrounding modern schooling. Whether we scrutinize the vertical integration function of schooling from a social reproduction perspective (Bourdieu) or dismantle horizontal integration as a normalization practice (Foucault), the project of modernity still suffers from the tension between myth and reality. Myths are nevertheless powerful, especially at the discursive level. They make people think and talk as if schooling has successfully carried out the project of modernity, that is, as if modern schooling has indeed generated cohesion (horizontal integration) and mobility (vertical integration) in societies in which compulsory schooling was introduced. Two core beliefs help perpetuate the myth of schooling: the belief in progress and the belief in social justice. Thus, when neoinstitutionalists contend that modern schooling reflects the values of progress and social justice, one needs to ask: at which level?

Global Speak of Inclusion, Local Practice of Exclusion

As the following should make clear, I share the neoinstitutional assertion that there is an international convergence of educational reforms. However, I maintain that with the exception of harmonization practices this convergence takes place at the rhetorical level only. The situation differs in those countries that have agreed to harmonize their systems and bring them in line with a newly created, larger educational “space” governed by new political entities and administrative units such as, for example, the European Union (Nóvoa & Lawn, 2002). But even where harmonization of practices has taken place, there still exist considerable differences between transnationally agreed-upon, nationally adopted, and locally implemented reforms. Without overly generalizing, there is a “global speak” about educational reforms that is heard from Brussels to Washington and from Seoul to Tunis, regardless of whether reforms in a particular country are harmonized, imposed, or voluntarily borrowed. At the same time, it is essential to point out that there exist vast differences when it
comes to enacting the prevailing “reform buzz” in national policy. Context also matters when that same national policy is implemented locally.

For neoinstitutionalists, these sort of contextual differences are conceptually irrelevant. They are typically dismissed as evidence of “loose coupling” between envisioned and enacted policy (Powell & DiMaggio, 1991), or (when examining classroom-level practice) as examples of “idiosyncratic variation introduced by teachers” (Baker & LeTendre, 2005, p. 177). From the systems-theory perspective presented here, however, it matters a great deal why some travelling reforms resonate more than others in a given country, as this tells us something about the “socio-logic” of a particular policy context (Schriewer & Martinez, 2004, p. 33; see also Steiner-Khamsi & Stolpe, 2006, p. 7f.). In contrast to the neoinstitutionalist approach, we are in the business of understanding the “how” and the “why” of policy borrowing. Thus, an investigation of how a borrowed reform is interpreted, locally adapted, or re-contextualized is of heightened research interest for this particular line of thinking. Another focus that we advance is the exploration of political and economic reasons for policy borrowing.

Systems theory emphasizes the gap that yawns between global rhetoric and local practice, and uses it as material that can shed light on the workings and the logic of a system. This provides an opportune moment, however, to interject an example that deals with the topic of this edited volume more explicitly: the gap between a global rhetoric of inclusion and the local practices of exclusion. As mentioned before, the messianic promises of the project of modern schooling are passed on from one generation to another, and yet, on a daily basis, that same project remains trapped in a conundrum of a special kind: on the one hand, we are confronted with conservative educational structures that are to the core exclusionary, while on the other hand there exists an elaborate discourse of inclusion to which each and every progressive educator must, at least rhetorically, profess their commitment. The parallel educational system in the Canton of Zurich, which caters to students’ individual needs before, after, or in between the regular instructional time, is a good case in point to demonstrate the rhetoric of inclusion and the reality of exclusion.

The rhetoric of inclusion is supported by the broader acknowledgment that students should not be discriminated against based on their social background or their special needs. In previous times in the Canton of Zurich (but also in other educational systems), every aberration from the norm was regarded as the result of the students’ own shortcomings or deficits, and little was done educationally to accommodate these students in the educational system itself. Over the course of the past century, however, the belief in the student’s right to be educated to the fullest of their potential has spread to every corner of the world. At the pedagogical level, this rights-based belief was translated into student-centered teaching. The method is now promoted as a superior and effective way of teaching, to the extent that teacher education in most countries is today centered on transmitting the theory and practice of student-centered teaching.1 As a corollary, a skilful teacher is characterized as someone who is able to recognize the varied needs and abilities of students, target these special needs individually, and deal with a heterogeneous class composition. In fact, the curriculum in teacher education rests on the assumption that the graduates will end up taking a teaching post in a heterogeneous class setting.

Reality, however, begs to differ. The global rhetoric on student-centered teaching and inclusive practices is diametrically opposed to the exclusionary structures of educational systems. Most systems have developed an elaborate parallel system of schooling that exclusively caters to students with special needs, is held outside the regular classroom, and is taught by specialists, ranging from educational specialists in charge of slow learners to learners with a mother tongue other than the language of instruction. Contrary to what all the talk of inclusion would have us believe, each and every student with “special needs” is delegated to an army of educational specialists who assist the regular class teacher, typically before or after class, in reducing the heterogeneity in class to a level that is bearable for the class teacher. Heterogeneity with regard to ability, language, and class has remained the cause for exclusion. As the following will demon-

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1 Ironically, student-centered teaching is now labelled the “modern teaching method” in Mongolia and the post-Soviet region.
strate, students with “special needs” and in particular children of immigrants are in the Canton of Zürich delegated to a regiment of professionals responsible for dealing with them.

A few comments on the inclusion/exclusion of immigrant children and youth may be in order here, given their large representation in vocational-technical education. I worked in the Ministry of Education of the Canton of Zürich from 1979 until 1988 where I established and directed the unit in charge of multicultural education policy. Along with other minority policy specialists, I actively supported the creation of compensatory measures for immigrant students. At that time, a disproportionately large number of children of immigrant workers were placed in inferior academic or vocational-technical tracks or even enrolled in segregated classes (“Sonderklassen”). What was unfolding in front of our eyes in the 1970s and 1980s, in other words, was a system of institutional discrimination. The inability to speak/write the language of schooling, the absence of powerful social networks, and finally the inaccessibility of financial resources to privately hire tutors or mobilize other kinds of support structures were all reasons contributing to the low academic and vocational achievements of children of immigrant workers. Immigrant workers then, and soon after, asylum-seekers and refugees replaced the Swiss workers as the new working class. As a result, the Swiss working class itself was able to experience upward social mobility. In the educational system of the Canton of Zürich, the stratification of society (German: Unterschichtung) occurred at the expense of immigrants: children of immigrant workers started to fill the undesirable positions in the educational system that were previously held by children of Swiss workers. Concurrently, xenophobic and racist explanations for the low achievement of children of immigrants ensured that the system of discrimination and exclusion was kept firmly in place.

At that time, advocacy groups for immigrant rights shared our belief that compensatory measures would help children of immigrants to improve their academic standing. These groups, working in unison with teacher unions and government representatives, established in good faith a parallel system of compensatory education for which specialists in German as a second language, community language instruction, and tutors for assisting with assignments were hired. As is the case with all institutions and bureaucracies, they expanded. Today, thirty years later, there is a sophisticated system of shadow education in place that is mostly offered outside the regular classroom and outside the regular curriculum. The clientele for this shadow system gradually grew to truly astounding proportions: in the 2007/2008 school year almost 9 of 10 children of immigrants were assigned to compensatory support measures. In comparison, only 3 out of 10 Swiss students were required to take additional instruction outside the regular classroom and class time (Bildungsdirektion des Kantons Zürich, 2009). We are confronted here with an interesting interplay between inclusion and exclusion. At the rhetorical level, everyone refers to the value of inclusion. However, the current organization of the educational system encourages the classroom teacher to delegate each and every “student with special needs” to a regiment of specialists responsible for processing heterogeneity in the direction, as Popkewitz would put it, of “normalization” (Popkewitz, 1998). If the shadow educational system continues to grow at the same pace as in the past twenty years, soon the majority of all students will simultaneously be instructed in the regular and in the shadow educational systems.

A recent OECD study, Teaching and Learning International Survey (TALIS), confirms the assessment presented above. It finds that teachers, despite the universality of the rhetoric of inclusion, prefer in practice to exclude or, more precisely, delegate the responsibility of teaching students with special needs to other, additional teaching support staff. Asked what they regard as main barriers to effective teaching, teachers from 24 countries replied: the lack of teaching resources and the lack of additional support staff that would help them with the instruction of immigrant students and students with special needs (OECD, 2009, p. 43). Nowadays, multicultural education faces a challenge that special education had to come to grips with in earlier times. Once a group has been socially constructed as a target group for compensatory pedagogical intervention, once corresponding structures have been created, and once professionals have been trained to cater for this new target group of students, the system becomes self-referential and self-sustaining. The professionals em-
ployed in this shadow system tend to generate tirelessly new reasons why the system should persist and the clientele should be expanded. As a result, the threshold for heterogeneity in the regular classroom has been continuously lowered over the past thirty years. While teachers in heterogeneous class settings at least first attempted to teach students with different social or cultural backgrounds individually, now s/he relies on a regiment of specialists charged with the task of educating ‘special’ students in an effectively parallel system. Precisely because the option to delegate exists, expectations have accordingly changed; teachers feel more stressed than before if they have to teach in a heterogeneous classroom.

The rapid expansion of compensatory programs, propelled by the rationale of equal opportunity, has been examined in great detail within the Swiss educational research community (e.g., Häfeli & Walther-Müller, 2005; Schweizerische Koordinationsstelle für Bildungsforschung, 2006). For our research on globalization and education, it presents a striking case of the gap between the global talk of inclusion and the local practice of exclusion. Rather than transforming the educational system in ways that accommodates immigrant children and youth and their specific needs, a parallel structure was set up to exclusively cater to minorities. It is only now, as the “minority” is slowly becoming a majority, that public attention has been drawn to the ever-expanding shadow educational system. In a few years, the majority of students, regardless of their nationality, will be assigned to receive one or more compensatory measures, taught in addition and parallel to the regular educational system. Needless to say that such developments make it necessary to revisit the role of teachers in the regular educational system. In addition, the expansion of a shadow educational system that caters to the “special needs” of students illustrates the gap between the (global) rhetoric of inclusion and the (local) practice of exclusion. Both educational systems – regular and shadow – co-exist side by side, because the correspondence between polity talk, policy action, and policy implementation is less extensive than is frequently assumed.

Understanding Globalization by Comparing Different Systems

Naturally, in comparative studies great attention is given to sampling and case selection decisions. In presenting another example of the rupture between (global) rhetoric, (national) enactment, and (local) implementation of travelling reforms, such methodological considerations should be kept in mind.

The lively debate between neoinstitutionalism and systems theory on whether educational systems are converging towards a global conception of education is continuously fuelled with new arguments, including methodological ones. In my research on educational import in Mongolia (e.g., Steiner-Khamsi & Stolpe, 2006), I proposed that globalization scholars examine policy transfer in contexts that are, at first sight, unlikely to borrow reforms from elsewhere. I argued that post-socialist Mongolia lends itself as a good case for studying globalization because it does not situate itself in a particular regional “educational space,” nor does it have a history of close allies with particular countries that would make cross-national policy attraction and emulation likely. Our selection of Mongolia as a case for studying globalization is situated in quadrant IV (see Table 1), known as a case selection that is designed to reflect “most different systems and same outcomes.”

Table 1: Comparative Case Study Analyses and the Study of Globalization.

<table>
<thead>
<tr>
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<th>Same Outcomes</th>
<th>Different Outcomes</th>
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<tbody>
<tr>
<td><strong>Most Similar Systems</strong></td>
<td>I weak case for studying convergence</td>
<td>II strong case for studying divergence</td>
</tr>
<tr>
<td><strong>Most Different Systems</strong></td>
<td>IV strong case for studying convergence</td>
<td>III weak case for studying divergence</td>
</tr>
</tbody>
</table>

2 In the same vein, a few neoinstitutionalist accounts of international convergence, in particular Baker and LeTendre’s analysis of educational systems that participated in TIMSS and TIMSS-R (Baker & LeTendre, 2005), need to be criticized for selecting cases that already share similar system characteristics. Their research design (quadrant I, Table 1) is inappropriate for investigating globalization in education and it represents a weak case for studying convergence.
The study of travelling reforms in Mongolia showed that, despite all expectations, policy makers in Mongolia actively and enthusiastically engaged in policy borrowing, but they did so selectively and in a highly rhetorical manner. We traced three borrowed reforms and found that ten years later, one reform was still in place (tuition-based higher education), one moved back and forth (decentralization of educational finance and governance), and one partially reverted to a structure that had been in place prior to the structural adjustment reforms of the 1990s (rationalization of staff and reorganization of schools). More frequently than not, reforms were selectively borrowed and partially implemented, but only as long as external funding was available.

In this chapter, I present another example that also reflects the “most different systems and similar outcomes” case selection design, which I consider the preferred design for researching the international convergence of national educational systems. The example deals with the recent trend of attributing student learning outcomes to the quality of the teaching workforce. In 2007, the consulting firm McKinsey & Co. issued a report (McKinsey, 2007) that helped to popularize this assertion. Written for policy makers and decision-makers, the report states its conclusions in dramatic fashion, and possibly for that reason has greatly resonated with different media outlets, including The Economist (October 18, 2007). The McKinsey report starts out by stating that smaller class sizes or larger financial input do not matter as much as other factors, especially teacher quality. The report showcases Singapore, league leader in TIMSS, as having an educational system that has a rigorous screening process in place to select the most capable and motivated school graduates for teacher education studies. In Singapore, most of the students who were admitted into teacher education studies end up working in schools. The McKinsey study draws on findings from IEA- and OECD-type studies and exclusively focuses on student achievement in developed countries. In other words, there is no mention of recruitment into teaching and teacher quality in educational systems that are considered “most different.”

Incidentally, the Kyrgyz Republic – one of the countries where I have conducted educational policy research for the past four years – participated in PISA 2006 and ranked lowest. In contrast to the Mongolia research series where I used policy borrowing as case selection cri-

teria, in this case I used system performance as the criterion. In comparative social research, the “most different systems and different outcomes” (quadrant III) is known as the contrastive method. This method was in earlier times used excessively to contrast, for example, US and Japanese educational values or the vocational-technical education system under conditions of a free marked economy versus a planned economy. In an attempt to contrast two vastly different contexts, we adopted the indicators for “recruitment into teaching,” used to describe the situation in Singapore (McKinsey, 2007), and applied them to analyze the situation in the Kyrgyz Republic. Figures 1a and 1b contrast the recruitment of students for pre-service teacher training and their transition into the teaching workforce in Singapore and in the Kyrgyz Republic.
Singapore scored top both in science and math in TIMSS 2003, and as mentioned before the Kyrgyz Republic scored at the very bottom (ranked 57 out of 57 countries) in PISA 2006. As Figure 1a illustrates, Singapore’s teacher training institutions are extremely selective. The universities only accept 20 percent of those who apply for teacher training programs. Almost all entrants actually complete their programs and then begin teaching. In fact, 9 out of 10 interested in teacher training (18 percent of those who applied for teacher training) end up working as teachers (McKinsey, 2007).

The situation is entirely different in the Kyrgyz Republic (see Steiner-Khamsi, Kumenova & Taliev, 2008): As Figure 1b demonstrates, the Government of the Kyrgyz Republic attempts to lure school graduates into the teaching profession by granting government scholarships. We may assume that 36 percent or more of the applicants enroll in teacher education because they receive a scholarship. The chart illustrates the high attrition rate during teacher training and the significant waste of government resources, given that 36 percent of all teacher training students in higher education receive government scholarships (i.e., are “budget” students) but only a few end up working as teachers. During the 5-year teacher training diploma program, 37 percent of those enrolled either abandoned their university studies or switched to another degree program. In total, only 63 percent of those who started teacher training actually completed their studies and obtained a higher education diploma with a teaching specialization. Of those that completed their studies with a teacher education specialization, only a few chose to become teachers. To make things worse, approximately one-sixth of those who accepted a teaching post in Kyrgyzstan quit the job within the first two years of their employment: only 17 percent of those who started out in teacher education studies accept a position as a teacher.

Naturally, the contexts contrast visibly. The teaching profession is an attractive job in Singapore and, for a variety of reasons (low and fragmented teacher salaries, difficult working environment, few social benefits, etc.), an utterly unattractive one in the Kyrgyz Republic. Teacher education institutions in Singapore can afford to be very selective with regard to applicants, whereas the same institutions in Kyrgyz Republic only stay in operation because they use a negative selection: they absorb those students who scored low in university entrance examinations and as a result were unable to gain entrance to other higher education degree programs.

Not surprisingly, teacher shortage in Kyrgyzstan, but also in other post-Soviet countries, is massive and cause for great concern for parents, the general public, and government officials. In fact, the Russian term kriziš pedagogicheskogo kadra [crisis of the pedagogical cadre] is frequently used in Kyrgyzstan to capture a complex situation, characterized by massive teacher shortage, poor quality of teaching, low motivation of teachers, teacher absenteeism, and horrendously low teacher salaries (averaging at 60 Euro/month). Yet, despite these vastly different contexts the reform rhetoric in Kyrgyzstan is identical with that in other parts of the world, including Singapore.

It is striking that “teacher accountability” is a frequently repeated refrain at the government level in Kyrgyzstan while teachers are in short supply and salaries are sufficiently low that they are compelled to work additional hours both at school (up to 50 hours of teaching) and outside of school as street vendors, farmers and cattle breeders in order to make a living (Steiner-Khamsi, Teleshaliyev, Moldokmatova & Sheripkanova-MacLeod, 2009). The punitive approach to improving teacher quality (Mintrop, 2004), as expressed in teacher accountability reforms that have catapulted around the globe for some time now, is counterintuitive in countries where there exists due to massive teacher shortage a great need for and dependence on teachers. Despite the limits on institutional capacity to enforce teacher accountability, a series of reforms were nevertheless transplanted to the Kyrgyz Republic in order to create “incentive schemes” to enhance teacher performance without increasing their overall salary. In one of these schemes, young teachers are to be lured into the profession and retained by depositing an attractive salary supplement in a bank account to which they only are given access after three years of professional service. Another traveling reform is the introduction of performance-based salaries or bonuses. In Kyrgyzstan, the reform was tested on a small group of teachers (in two pilot provinces) who were encouraged to work harder so that they qualified for a performance-based bonus. The pilot project was so expensive that it is apparent that it is unsustainable and unlikely to be scaled up.
It is important to realize that the failure of such incentive schemes is not a matter of technicalities, funding, or implementation, but rather reflects the fundamental contradictions that arise when (policy) solutions are uncritically borrowed from educational systems where problems are entirely different, such as where teacher shortages are considered unacceptable and incentives are created in order to encourage them to work harder. The situation in the Kyrgyz Republic is diametrically opposite to this. The reason why there is such a teacher shortage in Kyrgyzstan is precisely because the level of work expected of teachers is entirely disproportionate to their meager compensation. Nevertheless, government officials in the Kyrgyz Republic and in other developing countries approve the importance of these nonsensical reforms, albeit only to secure external funding from donors and only for the duration that such funding remains available. In developing countries, the import of traveling reforms or globalized education needs to be interpreted in terms of the economics of policy borrowing (Steiner-Khamsi, 2006). The main reason why educational reforms in developing countries look similar to the ones in developed countries is because international donors (development banks, international organizations) provide funding under the condition that a specific reform package – presented as “best practices” – is imported and implemented.

Speaking for a Global Policy Audience

The study of nonsensical or dysfunctional traveling reforms that pretend to be universal solutions for remedying national educational crises – in the case of Kyrgyzstan, the crises of low teacher quality and the widespread teacher shortage – provide important clues for understanding at what level globalization occurs and what the rhetoric of globalization does to national educational systems. One of the recurrent questions in this area of research is why policymakers borrow reforms that obviously are a poor match for their local needs. Arguably, this question is only intriguing if we find it worth scrutinizing why women wore mini-skirts in the seventies or men shave their heads in the new millennium. What signals a “fashion statement” in daily life used to be labeled the “zeitgeist” in the earlier social science literature. Similarly, the adoption of teacher accountability reforms, incentive schemes or any other global reform that travels around the world represents, so to speak, an “orientation statement” for educational systems. By borrowing reforms from other countries, policy makers situate their own educational system in a larger context or space.

This being said, it is important to point out that reforms are rarely transplanted linearly, that is, from one educational system to another without mediation. In these rare instances of direct policy transfer, the twin concepts of “externalization” and “reference society” appear to be useful (Schriewer & Martinez, 2004): the educational system of another country serves as a point of external reference against which one’s educational system is compared and then aligned. In most cases, however, borrowing occurs with much more opaque references to so-called international standards. Researchers who have studied educational policy borrowing and lending have found striking patterns in which the traces of a borrowed reform’s origins are erased over time (see Spreen, 2000; Silova, 2005; Steiner-Khamsi, 2002). This has led to the suggestion that we should draw greater attention to the timing of global policy borrowing. If this connection it may be useful to consider the epidemiological model, widely used in diffusion of innovation studies and social network analyses (see Watts, 2003), which differentiates between early and late adopters of a policy.

![Figure 2: The Epidemiological Model of Global Dissemination.](image-url)
Prior to the take-off point, only a few educational systems are “infected” by a particular reform epidemic. At this “slow-growth” stage, the early adopters of a reform make explicit references to lessons learned from other educational systems, especially those that they are specifically seeking to emulate. A good case in point is the transatlantic transfer of “school choice” reform between educational systems in the United States and the United Kingdom and Wales in the early 1990s. This example of lesson drawing helped to render an otherwise contested reform more palatable than it would have been otherwise in the absence of externalization. During the phase of explosive growth (the middle phase as depicted in Figure 2), however, more systems adopt a reform, and the traces of transnational policy borrowing disappear as more systems adopt a particular reform. Once a critical mass of late adopters have borrowed a particular reform, the geographic and cultural origin of the reform vanishes, lowering the threshold for decontextualized and de-territorialized versions to spread rapidly to remaining educational systems. Global dissemination occurs at this stage. The “epidemic” ends and the phase of global dissemination ceases, as the majority of educational systems selectively borrow bits and pieces of the reform while gaining immunity from other aspects of the reform. During the phase of explosive growth, policy makers only rhetorically borrow a reform. They do so out of the fear of being left behind and labeled as backward or parochial. Late adoption should be interpreted as an orientation statement made by policy makers to denote their geo-political affiliation with a larger, modern educational space. The “global talk”, occurring at this stage, is mostly of symbolic value with little consequences for policy action at the national level and policy implementation at the institutional level.

A range of existing studies has demonstrated that there are both political and economic reasons for this discursive policy borrowing. Politically, references to “lessons learned” from elsewhere or to globalization in general are made – depending on the political agenda – to either generate or to alleviate reform pressure. In other words, globalization is not an external force to which national education systems are passively exposed. Rather, rhetoric and semantics of globalization are internally induced precisely in order to generate or alleviate reform pressure. The act of externalization helps to resolve a protracted policy conflict, characterized by a stalemate situation in which an envisioned reform is supported by some and, with the same passion and power, opposed by others. By referring to experiences made in other educational systems, a Zusatzsinn (Luhmann) is generated, thereby adding leverage for one particular policy coalition at the expense of others. Thus, policy borrowing is a certification strategy and functions like a stamp of approval legitimizing the introduction of a reform, regardless of whether the actual components of a reform or only its label have been adopted. As highlighted with the examples from developing countries, notably from Mongolia and the Kyrgyz Republic, there also exist economic reasons for global talk. At times government officials are accused of double-talk: towards international donors they enthusiastically import reforms or adopt the “best practices” that the international donors put forward and fund, but towards their own domestic constituents they pursue national education reforms – without funding from international donors – that go against what they have committed to in their discussions and agreements with international donors.

There exists, however, a logic to adopting this Janus-faced strategy, which makes sense not only for policy makers in poor countries but also for those in the rich countries. In this regard, identifying and distinguishing between various audiences is the key for understanding globalization dynamics in education. The differentiation is essential for poor countries where government officials must engage in “global talk” in order to secure a grant or loan that is attached to a reform package. In contrast, policy makers in rich countries frequently speak for rather than to a global audience. Naturally, the audience is strongly influenced by transnational regimes (World Bank, OECD, UN system, etc.) that, in an age of evidence-based policy planning, produce global knowledge banks on effective education reform. Whether national governments or local institutions actually borrow and subsequently implement these “best practices” promulgated by transnational regimes, is, however, a separate issue. Granted, at times global or supranational forces can exert real force, such as in the case of harmonization agreements. In most instances, however, globalization in education is imagined and policy makers willfully mobilize “globalization” as a rhetorical construct to generate or alleviate reform pressure.
References


