Constructing Disability in Bhutan:
Schools, Structures, Policies, and Global Discourses

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DEDICATION

This dissertation is dedicated to the students, teachers, volunteers, officers, directors, members of the Royal Family, and policy makers that work to make Bhutan a more inclusive society.

I would also like to dedicate this dissertation to my grandmother, Bessie Leora Schuelka, who passed away while I was writing this autumn. Twenty-seven years ago, my grandmother successfully defended her own dissertation titled "Perceptions and reported changes in the secondary school curriculum by selected Iowa superintendents." She graduated with a PhD in Education Curriculum and Administration from Iowa State University in 1986. Her life-long commitment to education will continue to be an inspiration for me.

ABSTRACT

Bhutan is a small country in the Himalaya that has experienced rapid societal changes in the past 60 years. Perhaps the most significant change in Bhutan has occurred in its educational system, which grew from a very limited presence in 1961 to now serving the entire youth population of Bhutan. With this massive increase in educational service provision, the challenges of providing education for a heterogeneous student population are now front and center in Bhutanese policy and discourse. Specifically, one of the major challenges in Bhutanese education today is how to include students with disabilities in schooling. Inclusive education policy, philosophy, and practice has existed in international discourse for many years – especially in United Nations human rights initiatives such as the Convention on the Rights of Persons with Disabilities. This dissertation, using a vertical case study approach, explores the interactions of multiple levels of policy-making as the inclusive education discourse makes it way through Bhutan. At the top levels, two discursive streams are entering Bhutan – that of the medical approach to constructing disability and that of the rights-based approach to constructing disability. These distinct yet interconnected streams present a contradictory international message from which Bhutanese policy actors must try to make meaning. Several theories pertaining to the process of educational policy transfer are used to explain this policy borrowing process – world culture, world-systems, and a more anthropological approach – as it applies to the case of Bhutan. The study then shifts to the school level where the country's rich historical context has produced local socio-cultural constructions of disability that serve to 'disable' and exclude certain students. These multiple levels of analysis show how local understandings and practices of disability influence Bhutanese interpretations and implementation of inclusive education policy borrowed from elsewhere and add new insights into the study of policy in comparative education.

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PRELIMINARY EXPLANATIONS ABOUT USAGE CONVENTIONS

The unique nature of naming in Bhutan poses a few problems with research formats and styles that are conventional in North America, Europe, Australia, and New Zealand. First of all, it needs to be explained that Bhutanese names do not have a surname. The presence of two names is common, but neither first nor last name is a family name (except in a few rare instances, e.g. the Royal Family name of Wangchuck). Usually, a community Lama or high-ranking monk gives both names. These names do not have a gender affiliation, and there are only maybe two dozen common names that are typically used for either first or last name. For example, one person may be named Sonam Tshering and another may be named Tshering Sonam and, just from the name, one would not be able to guess the person's gender.

This naming practice is problematic for American Psychological Association (APA) citation format, as this format calls for the exclusive use of surnames as personal identifiers. To alleviate this bias in APA format, I have made the decision to write all Bhutanese names out in both the reference section and in parenthetical citations. The first given name of a Bhutanese author will be used in the alphabetical order of the reference section.

The reader will also notice that in front of some Bhutanese names referred to in this dissertation there is an honorific title. Common titles include *Dasho* [male, "Sir"]*, Ashi* or *Aum* [female, "Lady"]*,* and *Lyonpo* – which refers to the rank of Orange *kabnye* [scarf] bestowed by His Royal Highness, often to Cabinet Members and Heads of Ministries*.* These titles represent either members of the Royal Family or were granted by the Royal Family to recognize esteemed members of Bhutanese

society. Because of the importance of these titles, and the pervasiveness to which they are used in Bhutanese society, I will also be using them in this dissertation.

Throughout this dissertation, there are many words in Dzongkha – one language of Bhutan that is used in school, government, policy, most media, and other dominant forms of communication. The language of Dzongkha is officially formalized through the Dzongkha Development Commission, but there is still a significant variation in terms of definitions, interpretations, and – especially – spelling. For this dissertation, I am using the *New Method English-Dzongkha Dictionary*, Second Edition (Rinchhen Khandu, 2010) to provide the spellings and translations. Words that are not in Dzongkha but, rather, in Tsangla (aka "Sarchop") or another language of Bhutan (there are twenty) are noted in the text.

Throughout this dissertation I use words like 'modern,' 'Western,' 'traditional,' and 'secular.' I am fully aware that there are controversies and problems with each one of these words. However, these words reflect the terminology that many Bhutanese scholars use to describe aspects of society or education. Karma Phuntsho (2000) explains this sufficiently:

> I shall not try to define tradition and modernity, but by "traditional education and learning" shall arbitrarily mean the learning and pedagogical practice passed down to the present day Bhutanese by the indigenous scholars and adepts either in written or in oral form in the medium of classical or vernacular languages of Bhutan. In contrast, "modern" shall denote the recently established system of learning, which consists of various strands of western methods of education and pedagogy received either directly from the West or through India and transacted mainly in the medium of English. Hence, it mainly constitutes a western import introduced during the commencement of modernization in the last half of the twentieth century. The former mainly thrives in the religious centres such as *shedras* (*bshad grwa*), *dratshangs* (*grwa tshang*) and *drubdras* (*sgrub grwa*) and the latter flourishes in schools and colleges. (p. 98)

Another word that is problematic but used throughout this dissertation is 'disability.' I fully acknowledge that this word means different things to different scholars and activists. Many use the term begrudgingly as an imperfect way to describe the heterogeneous population that they are researching, while others refuse to use the word 'disability' and are on a perennial quest to find a new, more appropriate term like 'dis/ability' or 'differently abled' or even, controversially, 'crip'. I fully support this hermeneutic endeavor but, for the sake of simplicity and understanding for a wider audience, I place myself in the 'begrudgingly' camp and will stick with the term 'disability.'

PROLOGUE

It is a clear and sunny morning in the early spring of 2013, and the last wisps of cloud lift out of the Thimphu valley as the bright Himalayan sun breaks above the mountain peaks. Streams of children ascend the hill, steadily climbing to Thimphu Public School located above them. Many of the children climb alone or in small groups that laugh and joke raucously, and very few children are accompanied by an adult. Some children have walked for kilometers to get to the school, while many have caught rides in cars, taxis, buses, and in the backs of the stylized Tata trucks that ply the precarious roads of Bhutan.

The children are wearing school uniforms with the colors of their school – each school unique in its color and pattern combinations – and the uniforms mimic the national dress of Bhutan that is required for all office and bureaucratic workers. The boys wear *gho*, which is a robe-like uniform that is precisely, and complexly, folded and held above the knees by an extremely tight *kera* [cloth belt]. Boys and men that wear the *gho* also wear long socks and formal leather shoes. One of the key features of the way the *gho* is folded is that it produces a large pocket, or pouch, in the front that is used to carry all manner of materials – from wallets and mobile phones to wooden bowls used for eating and drinking. The girls wear *kira*, which is a full-length skirt that is also folded intricately and held in place by a *kera*. Traditionally, *kira* were body length and held at the shoulders by a silver brooch called a *koma*. In Bhutan today, it is most common for women and girls to wear a half-*kira* and cover the upper-body with a *tego*, or jacket, often made of silk. These

school uniforms represent a traditional dress of Bhutan that has been in place for hundreds of years.

In juxtaposition to traditional appearance, the school children carry lunch baskets weaved from colorful plastic strands that are now ubiquitous in Bhutan. The rice, *ema datsi* [chilies and cheese], *dal* [lentils], and *shakam* [dried meat] of traditional meals is now contained in bright plastic containers smuggled in from Tibet or imported from India or Thailand, and supplemented by packaged raman noodles [in Bhutan, typically called *Wai Wai* or *Maggi* after the brand names]. On the backs of the school children in *gho* and *kira* are backpacks adorned with figures from Ben-10, Yu-Gi-Oh, Angry Birds, and Hello Kitty to name a few. Many of the boys' backpacks feature the logos of the world's most-branded football teams: Chelsea, Arsenal, Manchester United, Barcelona, and Real Madrid.

Once the children reach the school grounds, they roam in packs with no adult supervision to monitor them. Boys dig in the dirt, stuffing earthen treasures into the handy storage of the fold in their *gho*. Others hang and climb on any structure available to them – mostly rocks, trees, and the school buildings themselves. Girls hang on metal bars and play games with stones on the dirt and cement while the older, adolescent girls stand in groups to gossip. The older boys showboat on the basketball court at the other end of the main ground. All the while, children continue to pour in from all sides of the hilltop school.

The grounds of Thimphu Public School consist of many buildings – over a dozen – that each house either different classes or different functions. The Special Education building stands alone in the corner of the expansive grounds, consisting

of a few classrooms and offices. The architecture of the building matches the other school buildings and is built in classic Bhutanese architectural style: white walls with decorated overhangs, windows, cornices, and doorways. The metal corrugated roof overhangs the walls on all sides and is built with space between the top of the building and the roof itself. During the monsoon season, the rain runs off the metal roof and collects in an elaborate series of concrete gutters, drains, and ditches.

It is spring – the beginning of the new school year in Bhutan – and the numerous trees on the school grounds are budding and blooming in brilliant whites, yellows, pinks, and reds. Just outside of the Special Education building is a particularly beautiful cherry tree with the recognizable pink and white *sakura* blossoms that would be right at home in Osaka, Japan. The school has many gardens as well – some used for aesthetic pleasure and others used for horticultural and agricultural lessons during the Environmental Science (EVS) classes that are mandatory in every grade.

At around 8:30am, the activities of the students change. Children of all ages come through with brooms made of dried grasses and begin to sweep the sidewalks, gutters, and courtyards. They laugh and play, but it is obvious that they are performing a task assigned to them. This, I later found out, was called "social work time" and is required of all students in the school, both those in regular and special education classes. Inside the classrooms, other students are straightening desks, tables, chairs, and performing other duties. The children perform these tasks seemingly without prompting or guidance. Meanwhile, the teachers of the school begin to gather together in the main ground to chat. There are parents,

grandparents, and other adults present and scattered throughout the school grounds. Many of these adults have set up picnics and are engaged in their own little communities within the school, weaving and gossiping as if the school in the middle of the largest city in Bhutan were a small village.

At 8:50 a.m., all of the students line up in the large courtyard. Lines have been painted on the ground to indicate where each class should stand and how far apart they should stand from one another. As the Vice-Principal approaches the sound system – perched above the courtyard and amongst beautifully painted murals of mythical and religious figures of Himalayan Buddhism – the students stand dutifully at attention. There is something almost militaristic about the whole affair, punctuated further by the Vice-Principal saying something in Dzongkha and the students fall "at ease," but remain standing.

The students begin to recite several Buddhist prayers and songs. They chant in unison while a bell rings in a clarion that seemed to echo from the distant mountains. Overlooking the school on a higher hill is an ancient Buddhist temple, its prayer flags quietly swaying in the gentle breeze. Some students take this exercise quite seriously while, predictably, others are goofing off. Most of the school personnel, who were standing on the periphery of the student rows, also engage in the prayers. A few teachers walk amongst the students, maintaining discipline when necessary.

After the conclusion of the prayers, the students are instructed to sit for meditation. One of the teachers takes the microphone and leads them in a guided meditation based on the colors of the rainbow:

Yellow means intelligence. So, feel your whole body turning yellow and filled with intelligence. Send this feeling to every living being. Wish them intelligence to benefit their family, friends, and the community.

Green means harmony and friendship. So, feel your whole body turning green and filled with harmony and friendship. Send this feeling to every living being. Wish them energy to inspire everyone around them to live in harmony and friendship.

Blue means peace. So, feel your whole body turning blue and filled with peace. Send this feeling to every living being. Wish them energy to create the conditions for all of the people in Bhutan and the world to live in peace.

During the guided meditation, most students seem to take the exercise seriously and are sitting with their eyes closed.

Once the meditation concludes after a period of silence, the student assembly takes on a more universal character. The Vice-Principal and others announce the school news for the day, remind the students about a few rules, and explain a few school calendar details. Some students from the pre-primary class level (Kindergarten-level) perform songs for the student body towards the end of the gathering. I was told that each class level participates in the performances at the morning assembly according to the schedule.

The assembly lasts about 30 minutes in total, and then it is time for the students to get to their classrooms to begin the academic part of the day. The student rise and are dismissed by rows, although the decorum and order breaks down almost immediately after each row is dismissed. The students rambunctiously stream into the classrooms of the different school buildings and the teachers follow close behind.

Following this school assembly, there is a meeting for new students and their families. The Vice-Principal and a few other administrative personnel go over the

school rules and policies. The Special Educational Needs Coordinator (SENCO) speaks to the students about the presence of "special needs children" in the school. Since this school is fairly unique in its inclusive education program, many children in Bhutan are not used to attending school with children with disabilities, and this has led to some negative situations and misunderstandings such as teasing and complaints. However, Thimphu Public School has been proactive about *teaching* the students to respect one another and their differences, blending official policy on special education with Buddhist principles of respect for all sentient beings.

The SENCO emphasizes that it is the students' responsibility to "help" the "special needs children." When she asks if any of the students had heard of special education, most have not, but they have heard that this school has children with disabilities. The SENCO goes on to explain that these new students should not be afraid of these children, that they are "children like you, but may not be able to think like you." The SENCO explains, "their [children with disabilities] brain does not work as fully as your brain," and "you need to teach them what is good and bad." She also stresses that the children with disabilities are not to be teased, bullied, or given nicknames. Yet in the same breath, the SENCO emphasizes that the "children with special needs should not be spoiled," leaving it to the new students to work out the differences between compassion and coddling as they embark on an education in Bhutan's newly integrated school system.

CHAPTER ONE: Situating the Study of Disability in Bhutan

Introduction

The prologue, recorded in my field notes on 15 March 2013, demonstrates a typical start to the school day for most Bhutanese children in the 21st century. Fifty years ago, however, few children in Bhutan would have gone to school at all – there were simply no schools to be found in most of the country. Beginning with the 'modernization' plans of the Third *Druk Gyalpo* [Dragon King] Jigme Dorji Wangchuck in the early 1960s, Bhutan has been on a slow and steady development path that included the institutionalization of formal schooling. The rise in prominence and participation of schooling in Bhutan in the last 50 years has been truly remarkable, essentially going from a handful of schools and a few dozen students to a nation-wide school system that features 553 regular schools and serves over 176,000 children[1] – roughly one-sixth of the entire Bhutanese population (Ministry of Education [MoE], 2012a).

With the expansion of schooling and educational opportunities for Bhutanese children, many arguments have been made for the importance of formal education in the development of Bhutan. The main arguments for formal secular schooling are to promote mass literacy and to promote economic growth – both in strengthening governmental bureaucracy to manage the economy and in the producing human capital necessary for integration in the global economy (Sonam Kinga, 2009).

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[1] In total there are 2,011 schools in Bhutan, which includes: public schools, private schools, institutes, continuing education centers, non-formal centers, and the monastic education system. Altogether, these 2,011 schools serve over 217,000 students (MoE, 2012a).

Concomitant with this economic rationale for the expansion of schooling was advocacy for formal education to produce citizens that were more cosmopolitan and could engage politically and economically with the South Asian region while maintaining Bhutan's independent character and relative independence from foreign influences (Karma Ura, 2004; Sonam Kinga, 2009). Arguments in favor of supporting the institution of schooling have also been based on the development of social and cultural cohesion (Karma Ura, 2004; Royal Education Council, 2012), an especially relevant proposition towards the end of the 20th century as Bhutan asserted itself and its identity in the region (although this assertion of national and cultural identity was not without its controversy as will be discussed further in Chapter Five). More recently, rationales for enhancing schooling have been made so as to align the purposes and goals of education with Bhutan's unique contribution to international development: Gross National Happiness (GNH) (MoE, 2012b), a measure of development progress based on four main pillars: sustainable and equitable socio-economic development, conservation of the environment, preservation and promotion of culture, and the promotion of good governance. These four pillars are measured using nine domain indicators: psychological wellbeing, health, education, culture, time use, good governance, community vitality, ecological diversity and resilience, and living standards. These various arguments for schooling suggest that the country is on a quest to define and maintain Bhutanese national identity in the 21st century through its education system. This is a challenge because the greater economic and social openness in the country during the past few decades calls into question the illusion of a homogenous and inclusive

society that has prevailed for centuries. This is a theme I will explore further in Chapter Five.

The greater integration of Bhutan into the United Nations system during the 1990s is another factor that has increased public perception of the importance and relevance of schooling. Beginning with the Education for All (EFA) movement in 1990, there has been a greater push by UN organizations and, indeed, a strong overall global discourse on increasing school enrollments and working towards greater educational parity and equity (Farrell, 2007). Bhutan fully participated in these programs and initiatives – which included the Millennium Development Goals and EFA – and appropriated these international goals into its policymaking articulating the purpose of schooling and the *right* to schooling in Bhutanese society (Ninnes, Maxwell, Wangchuck Rabten & Karchung Karchung, 2007).

The heightened global attention to EFA at this time corresponded with an increased awareness in Bhutan that its schools were not places that were accepting of *all* children. Despite the rather bucolic scene in the Prologue, the pictures of the school day after morning assembly – which will punctuate this dissertation – illustrate how Bhutanese schools, classrooms, and educational personnel mostly function in such a manner that limit inclusivity and construct disabilities among its students. This will examined in greater depth through explorations of policy in Chapter Four and practice in Chapter Five.

The juxtaposition of multiple educational discourses, as seen in the Prologue, is another pronounced feature of the current Bhutanese educational landscape. There is a significant presence of old and new, local and global, exogenous and

endogenous throughout Bhutanese society at present. For example, students'

uniforms consist of traditional dress but are accented by backpacks decorated with

symbols of international entertainment. Children also bring traditional foods for

their lunchtime meal but place them in plastic containers and supplement them with

packaged goods from elsewhere in Asia. Moreover, the requirements of Buddhist

prayer and meditation in public schools seem somewhat out of sync with the image

Bhutan seeks to present of itself as a pluralistic, modern nation-state. These are not

'either-or' juxtapositions of traditional versus modern but represent complex

interaction and cultural production in a multitudinous 21st century world. The

imbrication of the local and the global is especially relevant for Bhutanese youth,

who are tasked with negotiating a world very different from that of their parents

and grandparents. As Willis argues, "Young people are unconscious foot soldiers in

the long front of modernity, involuntary and disoriented conscripts in battles never

explained" (2003, p. 390). If youth have some agency in producing cultural forms

that synthesizes old and new ideas, they are also met with existing social structures

and institutions like that of schooling. On this, Spindler writes:

> [Educational systems] become, or are intended to become, agents of modernization. They become intentional agents of cultural discontinuity, a kind of discontinuity that does not reinforce the traditional values or recruit youngsters into the existing system. The new schools, with their curricular and the concepts behind them, are future oriented. They recruit students into a system that does not yet exist, or is just emerging. They inevitably create conflicts between generations. (1967/2000, p. 169)

However, the Bhutanese educational system represents an interesting and unique

case that may not entirely be encompassed by Spindler's quote above. While there is

cultural discontinuity, and there are deep generational differences that widen

through the practice of schooling, there also exists a dialectic that does not represent a clean break between traditional and new. The act of wearing a Yu-Gi-Oh backpack does not signify a rejection of Bhutan's past, nor does the wearing of a *gho* or *kira* [traditional dress] signify a rejection of Bhutan's future. The Buddhist notion of 'the middle way' or of balance may be one of the reasons why a dialectic rather than a distinct division best explains the relationship between extant social forms and more recent cultural imports.

The balance and negotiation between these dialectics were something that I witnessed every day as a participant in the Bhutanese school system. From August 2012 until July 2013, I was a lecturer at Royal Thimphu College in Bhutan. In fact, concepts such as 'creolization' and 'agents of modernization' are things that I *taught* my students in their sociology courses and many of them related personally and directly to these anthropological concepts. Indeed, I was an 'agent of modernization' myself. My role in Bhutan and its impact on this research will be detailed in Chapter Two.

Similarly, the construction of disability in Bhutanese society occurs in the space between traditional and new, global and local. Throughout this dissertation I will refer to the phenomenon of 'disability' as a constructed concept, identifying myself as an anthropologist believing that disability is *created* by culture(s) in an attempt to sort, label, and assert norms (i.e. McDermott, 1993; McDermott & Varenne, 1995). Not only has disability been constructed in the past by religious and cultural forces that continue to maintain these ideas, but disability is being constructed in the present through interactions with international development and

education institutions, with new 'experts' introducing medical models and rights-based approaches to disability, and with national and local actors who are reinterpreting older ideas about care and responsibility. In Bhutan, this means that the current construction and conceptualization of disability straddles the boundary between old and new, with much of the new information about disability entering Bhutan from elsewhere. However, this is a complex interaction and is the focus of the chapters to follow.

What is clear, in the case of Bhutan, is that the policies and services for students with disabilities can be attributed to influential individuals rather than rather nebulous discourses that somehow flow from the global to the national and the local. I argue in this dissertation that these individuals warrant greater attention in the field of comparative policy studies than they have heretofore received in studies of global policy discourses. These are individuals who bring ideas about and constructions of disability to Bhutan from their various positions in international or national organizations, and they include Bhutanese actors whose views on disability have been shaped by their travel or studies outside of Bhutan. In addition, school leaders and teachers who interpret and appropriate the country's disability and education policies are critical policy actors, with much of this dissertation focusing on how ideas about disability and disability policies travel from places like international conferences to places like Thimbu Public School. I argue that, in the case of Bhutan, policy transfer can best be understood by examining the discourses espoused by individuals positioned at different points in the policy landscape, and what gets taken up in policy and what is or is not

implemented in schools hinges on the efficacy of individual policy actors. In Chapter Three, I will explore some of the theoretical debates that surround educational policy transfer and the importance of focusing greater attention in policy studies on policy actors. Specifically, I will be examining the theories of world culture, world-systems, and what I term 'global constructivism.'

As global constructions of disability are reconciled with existing local constructions of disability, this represents a negotiation and 'creolization' of ideas (i.e. Hannerz, 1992). In Bhutan, the space where the negotiation of meaning and construction of ideas about disability is particularly pronounced is the school (Anderson-Levitt, 2003; Levinson & Holland, 1996; Spindler, 1967/2000; Sutton & Levinson, 2001). What I have observed in Bhutan during my fieldwork from 2012–2013 is an educational system trying to reconcile the ancient Buddhist monastic education system imported from Tibet; British missionary and colonial educational systems imported from India; human rights education, progressive student-centered approaches to teaching and inclusive schooling; and the development paradigm of GNH that is unique to Bhutan. All the while, this reconciliation occurs while the government tries to balance the needs of education to support the economy and produce ready human capital for the 21st century. The summative effect is that contradictory structures are being built that intend to *en*able but, in practice, *dis*able those who are now being integrated into Bhutan's schools. These structures are often hard to change once they become socio-cultural practice. Chapter Four examines how Bhutan is attempting to change these structures

through policy reform, while Chapter Five explores enduring social structures that disable students in Bhutanese schools today.

In order to study the complexity of educational policy transfer, the 'multidimensionality' of globalization (Kearney, 1995), and the 'policyscapes' of transnational ideas and ideologies (Carney, 2009) – while at the same time keeping local schooling practice within the frame as well (Anderson-Levitt, 2003; Sutton & Levinson, 2001) – I used a vertical case study approach as my methodology. The vertical case study was developed by Vavrus and Bartlett (2006; 2009; 2011) as a way to ethnographically and horizontally examine the local, or micro, level field of policy as practice and to examine the interactions and processes that occur between and amongst the micro, meso- and macro- levels. The details of this methodology are explained in Chapter Two, as well a full explanation as to how my research was planned and carried out.

In conducting this research, I specifically wanted to explore how international discourse around the concept of 'inclusive education' was being discussed and interpreted in Bhutan. There is a new National Policy on Special Educational Needs that is just being realized in Bhutan at the time of this writing, and the words 'inclusive education' are part of the policy discourse in Bhutan. Because of this discourse, Bhutan was an excellent site for a vertical case study as international constructions of disability and the 'global speak' (Steiner-Khamsi, 2010) of 'inclusive education' interact with the rich and complex historical and contextual factors of Bhutan.

Research Questions

My research questions for this dissertation are as follows:

- What contextual factors help to explain why the Bhutanese government has recently adopted an education policy for youth with disabilities?
- How is 'inclusive education' being interpreted and enacted by key educational stakeholders in Bhutan (educational administration officials, principals, teachers, students) and through Bhutan's educational policies?
- How are international constructions of disability incorporated or contested in local constructions of disability?
- What structures exist in Bhutanese schools today that 'disable' students?

The first two research questions are addressed most directly in Chapter Four on

Bhutan's policy landscape, while the last two research questions are taken up

primarily in Chapter Five. However, given the nature of a vertical case study and a

socio-cultural approach to policy analysis (Shore & Wright, 1997; Sutton &

Levinson, 2001; Vavrus & Bartlett, 2011), there is not a sharp distinction between

the chapters that explore global discourses, national policies, and local schooling

practices.

The remainder of this introductory chapter will provide background on the

educational history and context of schooling in Bhutan to help the reader better

understand the changes in education that have occurred in Bhutan during the past

fifty years and the unique cultural context of Bhutan in which these changes have

transpired. The first section is a general background on the development of the

Bhutanese education system. This section helps to explain the significant shift that

has occurred in Bhutan surrounding the cultural meanings of 'schooling' and

'disability.' This will segue into a section on educational policy and practice for

youth with disabilities in Bhutanese schools. The concluding section explores the

history of inclusive education policy, identifying its origins in Europe and North America, its dissemination through the United Nations system, and the difficulties in translation and interpretation surrounding 'inclusion.'

Education in Bhutan: From the Monastery to the Modern School

> It may not be an exaggeration to claim that of all the changes and developments that the Kingdom of Bhutan saw in the last half of the twentieth century the ones in education are the most evident, momentous and far-reaching. (Karma Phuntsho, 2000, p. 97)

The history of education in Bhutan does not begin and end with the implementation of formal secular education beginning in the 1960s. Rather, the act of education – to take the Spindler (1967) perspective that education serves to maintain and recruit into cultural membership and into specific societal roles – has long been occurring in Bhutan, since at least the time when Tibetans first began to descend from the Himalayan plateau and settle in the region. However, sudden and recent change would best characterize Bhutanese education today as it has quickly transitioned from a monastic educational tradition to a centralized government institution of 'secular' education for all youth. In this section, I discuss the historical and contemporary context of Bhutanese education because it is important to understand before heading into a discussion on inclusive education policy. With this background in mind, it may be easier to understand why a promise to educate *all* children presents many challenges in this country.

Any history of modern Bhutan understandably begins with the arrival of Zhabdrung Ngawang Namgyal, who came from Tibet in the 17th century and consolidated state power over the ever-feuding *dzongkhags* [districts], established

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the ecclesiastical state political system, effectively stopped additional invasions from Tibet, and laid the groundwork for taxation and bureaucracy (Ardussi, 2004; Karma Phuntsho, 2013; Sonam Kinga, 2009). After the death of Zhabrung in 1651 – although his death would not be officially acknowledged until 1705 in order to maintain the illusion of consolidated power – the history of Bhutan is rife with factionalism, wars between *penlops* [district governors], and extremely complicated power struggles between the *je khempo* [head of the Buddhist religious order], *desi* [civic ruler or Bhutan], and the four co-existing and recognized reincarnations of Zhabdrung (Karma Phuntsho, 2013). It would not be until the establishment of the Wangchuck monarchy in 1907 when Bhutan mostly subdued factionalism and began to significantly pull away from the ecclesiastical and feudal system.

Formal education in Bhutan from the 17th century until the 1960s primarily occurred in the monasteries, although some primary literacy and numeracy was also available to aristocratic youth through the hiring of private masters that came mainly from Tibet (Karma Phuntsho, 2000). There were also sporadic instances of Bhutanese traveling out of Bhutan to study in other schools in the South Asian and Himalayan region. The majority of these traveling students were Buddhist scholars, traveling to various Buddhist centers of learning in Tibet, India, Sikkim, and Ladakh (Karma Phuntsho, 2013). In the late 19th century there were an increasing number of secular students traveling to Northern India – particularly Darjeeling and Kalimpong – to attend Jesuit and British schools (Dewan, 1991). The early 20th century saw the establishment of the first secular schools in the valleys of Haa, Bumthang, and Trashigang through the invitation of a few Jesuit educators from

Northern India (Karma Phuntsho, 2013; Solverson, 1995). Because the history of this early educational exchange is relevant to a discussion on educational policy transfer, I will discuss this in more detail in Chapter Four.

Buddhist monastic schools comprised the majority of formal education in Bhutan throughout most of its history. While monastic education has been traced back in Bhutan to at least the 8th century CE (Tenzin Chhoeda, 2007), a formalized monastic educational system was established in 1622 by Zhabdrung in Thimphu (Jagar Dorji, 2008). The main religious centers of learning in medieval Bhutan were *shedra* [philosophy school, or 'college'], *lobdra* [monastic school], *rabdey* [district monastic body], and *drubdey* [practice school, or 'meditation center'] (Denman & Singye Namgyel, 2008). All of the languages of Bhutan were originally only oral languages, with no written component. Thus, the only literacy in Bhutan until the 20th century existed entirely within the religious order, reading and writing in *chökey* [classical Tibetan]. To the average Bhutanese citizen before the 20th century, understanding written language was not considered an important skill to acquire and had little impact upon their everyday lives (Jagar Dorji, 2008). It was more important to know how to grow food, make materials for living, and have good relations in one's community.

The monastic school system avoided the difficulty of teaching a diverse group of learners because the selection criteria for attending these schools eliminated youth who struggled with literacy, numeracy, and academic learning by rote. However, a great many young boys were sent to monasteries through a system called *tsunthrel* or *drathrel* ['monk tax'], whereby families chose which son to send

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to the monastery. It is unclear how much of this was voluntary and if the monasteries had the right of refusal (Karma Phuntsho, 2013). It should be noted that both boys and girls received monastic education, although the nunneries were fewer in number (Tenzin Chhoeda, 2007). Enrollment in the monastic educational system was generally less restrictive than other similar systems throughout Buddhist-influenced South Asia. Tenzin Chhoeda (2007) notes that "Bhutan is one of the few countries in South Asia that has historically always been largely egalitarian and not divided by a system of castes or classes" (p. 56).

For those youth that were selected or sent to a monastery, they received an education that initiated a life-long pursuit of learning and reflection. Pedagogy in the monasteries consisted primarily of memorization, repetition, exposition, and debate (Karma Phuntsho, 2000). The curriculum consisted of Buddhist texts and poetry, many of which were passed down orally instead of in written form. The monastic educational system was one of students and apprentices, with a fairly strict hierarchy based on age and academic skill (Jagar Dorji, 2008). Because a Buddhist monk or nun approached learning as a life-long pursuit, education was approached in a deliberate and careful manner that involved humility and respect for the learned elderly masters who imparted their wisdom slowly over many years to their apprentices. Jagar Dorji (2008) states that in this traditional system, change was minimal, and this monastic tradition has been in place for at least a thousand years in Bhutan.

Beginning with modernization efforts in the 1950s and 1960s, public education for the general Bhutanese population began in earnest and has risen

steadily ever since. The Third *Druk Gyalpo*, Jigme Dorji Wangchuck, initiated

modernization efforts during this time, believing that Bhutan needed to position

itself effectively in a modern global society (Sonam Kinga, 2009). In the first Five-

Year Plan in 1961, education was featured prominently in Bhutan's development

agenda and the Royal Government began to sponsor public community schools

(Jagar Dorji, 2003).

The change from monastic to secular education represented a cultural

change in how schooling was viewed in Bhutan and, indeed, a change in the cultural

construction of the 'educated person' (e.g. Levinson & Holland, 1996). Major

changes occurred in the conceptualization of education with the introduction of

'modern' education. For instance, while monastic education emphasizes personal

enlightenment and life-long reflection, modern education is seen as emphasizing the

acquirement of skills to be used externally, that is, to be used after school is

completed. Karma Phuntsho (2000, p. 112) explains:

> The dominance of modern education transformed the general patterns of
> education in [Bhutan]. The change ... was not merely that of pedagogical
> technique but also of purpose, content, perspective, and approaches. It was a
> shift of focus from the endogenous, sacred religious training, which
> emphasized spiritual development, to the exogenous, secular and technical
> education, which aimed at enhancing material and economic development.

This change in the conceptualization of schooling and education, along with the

change in pedagogical relationships to both subject and teacher, was and still is a

source of cultural anxiety (Tenzin Chhoeda, 2007). Tulsi Gurung (2008), in a

personal reflection on the relationship between her 83-year old grandmother and 7-

year old daughter, reflects, "With modernization and changing outlooks, children

have started to judge and question the authenticity of everything" (pp. 27-28).

Some of the anxiousness around this 'new' educational system can be attributed to its foreign influence. From the very beginning of its secular educational program, Bhutan physically and philosophically borrowed its modern education system from outside sources. By physically borrowed, I mean that Bhutan literally imported teachers and curricular materials from India beginning in the 1960s because it did not have either resource (Tenzin Chhoeda, 2007; Jagar Dorji, 2003; Karma Phuntsho, 2000). Thus, the primary language of public education from the 1960s until the 1980s was Hindi. Some families in rural areas used to hide their children when school officials came looking for them, fearing foreign indoctrination (Jagar Dorji, 2003).

Attitudes towards modern secular education in Bhutan gradually shifted to become more positive. Beginning in the 1980s, the Royal Government took tangible steps away from the Indian system by localizing the curriculum and the teaching force by moving away from using Indian expatriate teachers. It also invested in new Bhutanese-based curricular materials, created its own school certificate examinations (which were previously held in New Delhi), and embraced activity-based/inquiry-based pedagogy in contrast to the existing British-Indian model of lecture and memorization (Tenzin Chhoeda, 2007). This period is what Singye Namgyel (2011) terms, the 'Bhutanization' of the education system. During the 1980s, Bhutan also established English as the primary language of its school system, although the Royal Government also decreed that Dzongkha become the lingua franca of Bhutan and taught in every school, together with English, at every class level (Karma Phuntsho, 2000). On language usage in Bhutan, Kunzang Choden

(2008a, p. 31) writes, "in the sphere of language and literature we have not escaped the dominance of the English language and the influence of western thoughts." The implementation of Dzongkha as the second language of schooling has also been criticized. Karma Phuntsho (2013) notes,

> Today, Dzongkha is taught in schools; most Bhutanese speak Dzongkha imperfectly and only a few can write in Dzongkha with ease ... Dzongkha was not even spoken by the majority of Bhutanese people. It was perceived to be as hard as learning a foreign language. To make things worse, Dzongkha is disappointingly short of vocabulary to render new technological and scientific terminology. These problems encumber Dzongkha even today and its viability as the national language against the onslaught of English is being tested today more than ever before. ("Many Tongues")

The 'Bhutanization' of educational reforms began with the New Approach to Primary Education (NAPE) in 1985 and expanded in the 1990s through support from the Asian Development Bank (Bray, 1996). The United Nations Educational, Scientific, and Cultural Organization (UNESCO), along with consultants from the Institute of Education at the University of London, were involved in the early development of educational curriculum that featured an emphasis on science, mathematics, and literacy as well as building Bhutanese teacher capacity with the introduction of a B.Ed course administered primarily by Indian staff (Raoof, 1985). However, many in Bhutan consider NAPE a failure "because it didn't show immediate outcomes and results were not visible," according to one Bhutanese education official I interviewed (13 June 2013). Although this may be true, NAPE initiated educational reform-minded thinking that introduced discourses on child-centered learning and locally-relevant curriculum (Interview, 13 June 2013).

Making modern education curriculum better fit the culture and values of Bhutan provided an education system that was more relevant and more acceptable

to the everyday lives of the Bhutanese citizenry. Tenzin Chhoeda (2007) suggests

that localization and community participation in Bhutanese curriculum "provided

flexibility for Bhutanese educators to introduce new Bhutanese content and value

systems in the education program" (p. 58). The outcomes expected for students at

the end of primary school reflect a balance between the academic expectations of a

'modern' country with a uniquely Bhutanese cultural twist. These expectations

include the following (cited in Tenzin Chhoeda, 2007, p. 60):

- Basic skills in reading and understanding both English and Dzongkha
- Ability to write sample letters, applications and reports in both languages
- Speaking and understanding Dzongkha and English fluently
- Understanding mathematical functions of addition, subtraction, multiplication, division, and ability to maintain everyday accounts
- Basic knowledge of health and hygiene
- Knowledge of social studies, geography, and history of Bhutan
- A deep sense of respect and pride in being Bhutanese, and in being citizens who are loyal, dedicated, productive, contented, and happy with a high standard of moral ethics and discipline
- A greater understanding and appreciation for the predominantly agriculturally-based rural lifestyle and a developed sense of resourcefulness and dignity of labor

Today, the concept of Gross National Happiness (GNH) is central to Bhutan's

education strategy, as the government commits to "maximize the happiness of all

Bhutanese and to enable them to achieve their full and innate potential as human

beings" (Royal Government of Bhutan [RGoB], 1999, p. 12). Many Bhutanese

scholars and social commentators, especially Dasho Karma Ura (2009), believe that

incorporating GNH into the curriculum and the education system as a whole would

better serve the moral development of Bhutanese children and inculcate common

values. Currently, infusing GNH ideals and ideology into the education sector has

been the main concern of the Ministry of Education (MoE, 2012b). However, Pema

Tshomo (2013) has found that there is much misinformation and misinterpretation by Bhutanese teachers as to what putting GNH into their classrooms actually is supposed to look like. The concept of Education for GNH will be discussed further in Chapter Five.

The education system in Bhutan today has many challenges, not least of which is trying to realize GNH in the classroom. The challenges of the Bhutanese school system are not unique in its lack of sufficient resources, lack of qualified teachers, unrealized curricula, outdated pedagogy, and lack of adequate physical educational structures (MoE, 2012a; Royal Education Council, 2012). Dasho Sonam Kinga (2005) argues that the education system is woefully preparing the children of today for the Bhutan of tomorrow and cites the current crisis of youth unemployment as a serious impediment to Bhutan's development. Among the challenges in the Bhutanese educational system, the barrier to access for youth with disabilities is increasingly becoming part of the discourse. In the next section, I will specifically address this issue. For a complete look at the current Bhutanese educational system, please refer to Appendix D.

As I discussed above, the secular modern education system in Bhutan has been placed on top of, and next to, the far older monastic formal education system. With the rapid societal changes that have occurred in Bhutan in the past 50 years, the formal education system has been placed directly in the swirling center. The concepts of 'schooling' and 'education' have changed as well, and today there are many conversations occurring as to how to make the education system better fit the needs of disabled youth in Bhutan in the 21st century.

Education for Youth with Disabilities in Bhutan

One of the primary challenges for a modern education system is contending with human difference. Whereas the monastic educational system in Bhutan was designed for those who naturally inclined towards literary activities and spiritual practice – while the majority of the population engaged in agricultural activities without the need for literacy – the modern educational system brings heterogenous youth together in one classroom with one teacher, and with the expected outcome that they all will learn together. Jagar Dorji (2008) argues, "For the [Bhutanese] teacher ... the secular system [is] more difficult as he or she ha[s] to deal with a number of pupils with varied learning abilities and problems" (p. 22). As has been the case in the development of other educational systems, committing to compulsory education for *all* summons the dilemma of how to educate youth with differing abilities effectively and efficiently (Schuelka & Johnstone, 2012).

Within the past ten years, the Royal Government of Bhutan and the Ministry of Education have become increasingly interested in how to best educate youth with disabilities in schools. In the ninth Five-Year Plan, a Special Education Unit was established within the Ministry of Education to specifically address the needs of both staff and students involved in the education of youth with disabilities (RGoB, 2002). In 2002, The Royal Government estimated that 3.5% of the Bhutanese youth population had a disability (RGoB, 2002); however, the criteria for determining this figure is a bit unclear. In 2012, UNICEF found that 21% of children in Bhutan ages 2–9 had a disability, according to their criteria using a two-stage multiple indicator survey (National Statistics Bureau & UNICEF, 2012). Obviously, these prevalence

figures are far apart. Disability statistics are notoriously hard data to collect given the subjective nature and fluid categorization of disability (Mont, 2007). Regardless of which figure is more accurate, the desire and need for all Bhutanese children to attend school means addressing the educational challenges and opportunities of students with disabilities and has become a top priority for the Royal Government (2002; 2009) and the Ministry of Education (2004; 2010). The Royal Government (2009) has claimed that 10-12% of children do not attend school because either they have a disability or live in extremely remote areas of Bhutan.

The Bhutanese Department of Education, within the Ministry of Health and Education,[2] spells out its vision on education for students with disabilities in *Education Sector Strategy: Realizing Vision 2020* (2003). Their vision is as follows:

> All children with disabilities and with special needs – including those with physical, mental and other types of impairment – will be able to access and benefit from education. This will include full access to the curriculum, participation in extra-curricular activities and access to cultural, artistic, recreational and leisure activities. The programme will be supported by trained and qualified personnel using teaching strategies responsive to different learning styles to ensure effective learning. Teacher training will be re-oriented as a means of achieving these objectives.

> Children with disabilities and those with special needs will, to the greatest extent possible, be able to attend a local school where they will receive quality education alongside their non-disabled peers. The provision of education should not take children away from their families and local communities. Maximum participation by parents should be secured in order to achieve partnership in education. Children with disabilities who spend time away from home in educational boarding facilities shall be ensured inclusive education and safety. Institutes of higher learning will be equally accessible to disabled young people. (p. 36)

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[2] This organizational structure is no longer used. As of this writing in 2013, the Ministry of Education and the Ministry of Health are two separate entities and the Special Education Unit falls under the Ministry of Education.

After listing the various challenges to such a vision that must be overcome, the

Department of Education suggests that "inclusive education approaches should

guide the schooling of disabled children" (2003, p. 38). There is no explanation of

what inclusive education approaches explicitly look like, although the strategies for

realizing full access to education include curriculum reform, developing teacher

skills, and collaboration with other sectors such as health and employment.

Inclusive education continues to resonate within Bhutanese policy

documents. The Royal Government's tenth Five-Year Plan (2009), the major

educational sector strategy in effect today, includes the following:

> Enhance education of the disabled through inclusive education, and continue
> creating support facilities in select schools to allow these children to access
> general education in regular schools. The strategy for support mechanisms
> will be based on a study of various disabilities. (p. 122)

In the official government release of educational statistics, the Ministry of Education

(2010) confirms their commitment to inclusive education:

> The long-term objective of the Special Education Services Programme is to
> provide access for all children with disabilities and special needs, including
> those with physical, mental and other types of impairment, to general
> education in regular schools. The Royal Government will thus seek to
> maintain an inclusive approach to improve educational access to and meet
> the special needs of those with physical disabilities and learning
> impediments. (p. 61)

While there are still large gaps between inclusive policies and the material,

curricular, and personnel capacity to commit them to practice, Dorji (2003) suggests

that Bhutanese culture is already comprised of the values necessary for an inclusive

approach to education. He describes the Bhutanese educational approach as holistic

'wholesome education' and argues:

> Wholesome education in our context is also interpreted as inclusive. Inclusive education is giving every child an opportunity to participate in activities rather than limiting it only to those talented and bold ... Thus, inclusive education provides equal opportunities to all children in order to acquire knowledge and skills blended with moral and ethical values to become good citizens. (pp. 102-103)

The connection between inclusive education and developing 'good' citizenry – both in the democratic sense and in the moral sense – is becoming stronger with the greater focus on putting GNH front and center in educational development (Karma Ura, 2009; MoE, 2012b).

In 2012, a new National Policy on Special Educational Needs was drafted. This policy was created as part of an overall education policy reform. At the time of this writing, this policy has been approved by the GNH Commission and is awaiting ratification in Parliament, which has seen a change in government that delayed all bills for a time in 2013. The specifics of this new policy, and how policies are made in Bhutan, will be detailed and analyzed in Chapter Four. Particularly in the discussion of this policy in Chapter Four, I will highlight the significant amount of international collaboration that was employed to formulate and write this policy. Briefly, the National Policy on Special Educational Needs (MoE, 2012c) brings forward a strong inclusive education agenda that aspires to increase the quality of teaching, other educational and medical personnel, curriculum, accommodations, educational services, and physical structures. However, there is also an admission that 'special' schools and facilities should be used for children with moderate to severe disabilities. Again, this will be discussed further in Chapter Four.

Currently, the Ministry of Education runs educational services for students with disabilities in Bhutan in eight schools/facilities, although there are plans to

expand this number to fifteen (Field Notes, 3 December 2013). In addition, there are

three private schools for disabled students. These are listed and described in Table

1:

Table 1: Schools/Facilities that Serve Students with Disabilities in Bhutan

School / Facility	Location (*Dzongkhag*)	Description
Thimphu Public School*	Thimphu	• 12 instructors (school wide): 65 students w/disabilities • First location to serve students with disabilities in Bhutan (established 2006) • Seen as a pilot school to establish an inclusive model for other schools
Tendu Higher Secondary School	Samtse	• 7 instructors (school wide): 10 students w/disabilities • Inclusive pilot school
Mongar Lower Secondary School	Mongar	• 44 instructors (school wide): 63 students w/disabilities • Inclusive pilot school
Drugyel Lower Secondary School	Paro	• 13 instructors (school wide): 62 students w/disabilities • Integrated special school
Deaf Education Unit	Paro	• 17 instructors (school wide): 73 students w/disabilities • Boarding facility • Special Education only
Jigme Sherubling Higher Secondary School	Trashigang	• 31 instructors (school wide): 13 students w/disbilities
Khaling Lower Secondary School	Trashigang	• 17 instructors (school wide): 13 students w/disabilities • Integrated special school
National Institute for the Visually Impaired (NIVI), or *Muenseling*	Trashigang	• 15 instructors (school wide): 44 students w/disabilities • Boarding facility • Special Education only
Zhemgang Lower Secondary School	Zhemgang	• 20 instructors (school wide): 13 students w/disabilities • Inclusive pilot school
Inclusive Thimphu School*	Thimphu	• Private school, but uses an inclusive model and accepts children of all abilities
Thimphu Special School*	Thimphu	• 7 staff : ~40 students w/disabilities
Eastern Special School*	Trashigang	• 5 staff : ~ 70 students • Boarding facility

* = pseudonym used as these are research sites

There is no Special Education degree or certificate at Paro or Samtse Colleges of Education – although the Ministry of Education and the Royal University of Bhutan hope to add this to the degree options by 2015. Because of this absence in certification, most teachers that work with students with disabilities do not have specific training in Special Education, although a few have studied it in India, Australia, Canada, and the United States. The Ministry of Education, however, does not provide specialized curriculum or instructional guidelines for students with disabilities, which means that the typical scenario is for a teacher without special education training to be teaching without any guidelines or curricula tailored to the needs of students with disabilities. In addition to the schools and facilities run by the Ministry of Education listed above, there are a handful of civil service organizations and international non-governmental organizations that currently either provide direct service or support in other areas. Yet they, too, have few trained staff or enough staff for full coverage. These are listed in Table 2:

Table 2: Civil Service Organizations that Serve Persons with Disabilities

Organization	Location	Description
Bhutan Ability Center*	Thimphu	• 7 staff, mostly social workers • Provides physical therapy, occupational therapy, and behavioral therapy through in-house services, home visits, and school visits • Starting to provide inclusion facilitation services to schools without a Special Education Unit • Starting to provide inclusive employment support • Established in 2011, currently a patron of Her Majesty the *Druk Gyaltsuen*

Thimphu Special School*	Thimphu	• See Table 1 • In addition to education services, it also provides vocational training • Established in 2001, currently a patron of Her Majesty the Queen Mother Ashi Tshering Pem Wangchuck
Eastern Special School*	Trashigang	• See Table 1 and Thimphu Special School description above
Disabled Persons Association of Bhutan	Thimphu	• Organization run by and for adults with disabilities • Policy and social service advocacy organization
UNICEF-Bhutan	Thimphu (org. based in New York, NY)	• Provides financial and technical support
Bhutan Canada Foundation	Thimphu (teachers placed around Bhutan)	• Places volunteers from Canada and other Western countries into schools, including Special Educators
Bhutan Foundation	Thimphu (org. based in Washington, D.C.)	• Provides financial and technical support
Special Olympics	Thimphu (org. based in Washington, D.C.)	• Provides some funds and expertise to support athletics, disability awareness, and health programming
Japanese International Cooperation Agency	Thimphu (org. based in Tokyo)	• Supports Big Bakery, which employs persons w/ disabilities • Provides logistical support

* = pseudonym used as these are research sites

The Bhutan Ability Center, Thimphu Special School, and Eastern Special School comprise the majority of actual service delivery for persons with disabilities outside of the school system. There are mental health and physical therapy services available at the Jigme Dorji Wangchuck National Referral Hospital (JDWNRH) in Thimphu, but these are not exclusive of persons with disabilities, nor does it provide comprehensive services. For example, there are only two psychiatrists in the entire country of Bhutan, creating a 2:700,000 psychiatrist-to-population ratio. In the last seven years, over 1,300 patients have been admitted to the psychiatric ward at JDWNRH (Rinchen Pelzang, 2012). According to one physical therapist whom I

interviewed, there were adequate physical therapy services at JDWNRH but people

from all over Bhutan had to travel across the country to access them, as they were

only offered at JDWNRH in Thimphu. This physical therapist goes on to say,

> Most of the chronic disabilities I saw stemmed from trauma, typically due to motor vehicle accidents resulting in spinal cord, traumatic brain injuries, and complex lower extremity fractures/trauma with non-healing wounds. Another significant group were the alcohol-related conditions like cirrhotic liver disease and alcoholic neuropathy.
>
> That said, there were many patients with general orthopedic conditions who came in for way too long as the level of care simply doesn't result in great outcomes. (personal communication, 15 November 2013)

In short, the demand for services related to disability is overwhelming the supply.

The scope of this section and the previous one presents an ever-evolving

development of educational services for youth in Bhutan, and for youth with

disabilities in particular. Currently, the provision of these services is not widespread

and is inconsistent. This is understandable given the nascence of including youth

with disabilities in education at all, and the limited resources at the disposal of the

Ministry of Education, schools, and other organizations. In all, it is only in the past

ten years that youth with disabilities have become involved in the education system

to a significant degree. The international discourse around the right of youth with

disabilities to be included in educational system has also increased over the past ten

years. In the next section, I will describe some of the initiatives and discourses that

may have influenced Bhutan.

As modern schooling began to take shape institutionally in 'Western' countries (i.e.

Europe, the United States, Canada, New Zealand, and Australia), movements of

compulsory mass education brought forth a dilemma: how do we educate *everyone*?

Inclusive education was not a philosophical idea, let alone an explicit policy, during

the early days of common schooling. It is worth briefly tracing the history of

education for youth with disabilities in the 'West,' as the dilemmas, contestations,

and solutions in inclusive education around the world have evolved from this

historical-cultural context. I argue that this Western context continues to shape how

inclusive education is conceptualized in global educational policy discourse, similar

to the argument which Vavrus and Bartlett (2012) make on learner-centered

pedagogy as a globalized-localism – an educational idea shaped by local context and

then exported.

Education as a formal institution – set apart from religious and family

institutions – took hold in Europe during the 18th and 19th centuries (Ramirez &

Boli, 1987). These ideas spread to North America quickly and, in the United States,

they were reshaped by Horace Mann, John Dewey, and Samuel Gridley Howe to

name a few important early innovators (Richardson, 1999). While both Europe and

the United States deemed most students with disabilities 'uneducable,' the early

American education system emphasized the importance of the 'common school' and

placed these students either at home or in 'ungraded' classrooms rather than in

residential institutions (Snyder & Mitchell, 2006). These classrooms were places

with little in the way of formalized curriculum or academic rigor but, nonetheless,

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students with disabilities were in the same building/community as their non-disabled peers. In Europe, the belief was that youth with disabilities could be better educated in separate schools with specialized instruction (Snyder & Mitchell, 2006).

This dichotomy of philosophies in the education of children with disabilities between segregation and inclusion is still quite present and informs global debates on how to educate all children in school. Today, most European countries have a much higher percentage of 'special schools' and segregated institutions for students with disabilities than in the US (OECD, 2005), which speaks to a general historical precedent of specialized education in separate institutions. However, some European countries, e.g. the United Kingdom and Scandinavia, have fully embraced an inclusive model of educating students with disabilities in general classrooms. Other western European nations have a much more mixed approach of some inclusion and some special schooling, reflecting their historical-cultural perspective on schooling (Booth & Ainscow, 1998; Kozleski, Artiles & Waitoller, 2011; OECD, 2005). Inclusive education becomes much more of a dilemma when trying to incorporate students with visual or hearing impairments, which have been traditionally taught in segregated schools. These students use entirely different systems of communication – sign language, braille, or technological devices – which places a great deal of burden on a general classroom with only one teacher. It is also important to consider that students with visual or hearing impairment may also be 'members' of a sub-culture generated around the use of alternative communication and may feel that inclusive education means assimilation rather than empowerment (Norwich, 2008). Xenophobic policies in the US during the 19th and early 20th

centuries forced persons with hearing and/or sight impairment to integrate into a

hearing and seeing society, banning alternative communication such as sign

language and braille and causing cultural rifts still felt today (Baynton, 1992).

At the center of many of these contemporary debates are the initiatives and

human rights declarations of the United Nations system. The deliberations leading

up to the 2006 Convention on the Rights of Persons with Disabilities (CRPD)

featured an impassioned debate on inclusive education and how to best balance its

idealistic goals with material realities, political contexts, and the loss of a unique

cultural identity (Armstrong, Armstrong & Spandagou, 2011; Miles & Singal, 2010).

Nevertheless, the CRPD represents a milestone in the global disability rights

movement and in its advocacy for inclusive education (Kayess & French, 2008;

Harpur, 2012; Miles & Singal, 2010). Disability rights and educational rights have

existed in two separate discourse and policy streams in the UN system up until the

CRPD. This history can be seen in Table 3:

Table 3. Education and Disability Rights Initiatives in the UN System

Human Rights Focus	Education Focus	Notes
Universal Declaration of Human Rights (1948)		Not specific to disability, but general human rights framework interpreted.
Declaration of the Rights of Mentally Retarded Persons (1971)		
Declaration on the Rights of Disabled Persons (1975)		
International Year of Disabled Persons (1981)		Major impact on national disability rights movements
	Jomtien Conference on "Education for All" (1990)	Not specific to students with disabilities other than promoting educational 'access'

	UNESCO Salamanca Conference on Special Needs Education (1994)	Highly influential, first advocacy of 'inclusive education'
Millennium Development Goals (2000)		Education prominently featured, but no mention of students with disabilities
Convention on the Rights of Persons with Disabilities (2006)		Landmark human rights accord, specifies 'inclusion' as a human right
Realizing the Millennium Development Goals for Persons with Disabilities Towards 2015 and Beyond (2011)		Realigns the MDGs to focus on CRPD mandates

Source: (Schuelka & Johnstone, 2012)

In article 24 of the CRPD, the educational rights of children with disabilities are clearly established, stating that such children are not to be excluded from an education on the basis of disability or the ability to pay (UN, 2006). The CRPD also pushes a specific kind of educational delivery system for children with disabilities, as illustrated by the following quotation:

> States Parties shall ensure that … [p]ersons with disabilities can access an *inclusive,* quality and free primary education and secondary education on an equal basis with others in the communities in which they live. (UN, 2006, article 24.2.b, emphasis added)

Note that while the CRPD uses the word 'inclusive' to describe the type of education that is a basic human right for persons with disabilities, the CRPD does not specify whether students with disabilities should attend the same community school with non-disabled students or be given an equal education in a specialized institution. The CRPD does state, "Effective individualized support measures are provided in environments that maximize academic and social development, consistent with the goal of full inclusion" (UN, 2006, article 24.2.e), however, the CRPD also leaves open the acceptability for special schools:

> States Parties shall ... [ensure] that the education of persons, and in particular children, who are blind, deaf or deafblind, is delivered in the most appropriate languages and modes and means of communication for the individual, and in environments which maximize academic and social development. (UN, 2006, article 24.3.c)

In both of the quotations above, "environments that/which maximize academic and social development" is troubled with subjective, biased, and individual interpretations. In the United States, this principle is known as "Least Restrictive Environment" (LRE) and has been fraught with court cases between parents, teachers, principals, and school administration trying to figure out the best placement for a student with a disability on a case-by-case basis (Rothstein & Johnson, 2010). The ambiguous legal language of the CRPD can present challenges for countries – such as Bhutan, a signatory to the CRPD – in interpreting what 'inclusive education' means in policy and practice. Indeed, when the word 'inclusion' is used by the UN, policy consultants, or international non-governmental organizations (INGOs), no one may be talking about inclusion in the same way. In fact, some may use 'inclusion,' 'mainstreaming,' and 'integration' to describe what they believe to be the same thing while others view these as distinct practices.

The term 'integration' was used in the 1970s in national education policies and organizations such as the Organisation for Economic Co-operation and Development (OECD) (Vislie, 2003). 'Integration' emphasized justice and social rights of formerly marginalized groups – particularly students with disabilities. Inclusion, however, entertains a broader vision and a higher ambition to develop schools able to reach and develop all children as individuals (Vislie, 2003). To put it another way, 'integration' means the right to step in the school door, and 'inclusion'

means the right to participate in a meaningful way once a student with a disability is inside. Further, 'integration' leaves the onus of participation on the individual with the disability because it does not inherently change the classroom, while inclusion promotes education systems that are more dynamic and responsive to all children because of its focus on meeting the differentiated needs of all learners. Linguistically, the term 'inclusion' was faced with translation issues. In Sweden, for example, there was no term that specifically meant 'inclusion' in the English sense, and the translation was roughly equivalent to the Swedish term 'integration' (Berhanu, 2011). Understandably, this created a hardship for international organizations trying to emphasize the difference between 'integration' and 'inclusion.'

The UNESCO Salamanca Conference on Special Needs Education in 1994 was instrumental in introducing the idea of inclusive education into the international discourse on marginalized groups–particularly children with disabilities (see Figure 3 above). The Salamanca Conference defined inclusive education as follows:

> ... schools should accommodate all children regardless of their physical, intellectual, social, emotional, linguistic or other conditions. This should include disabled and gifted children, street and working children, children from remote or nomadic populations, children from linguistic, ethnic or cultural minorities and children from other disadvantaged or marginalised areas or groups. (UNESCO, 1994, p. 3)

This position from UNESCO represents a rights-based approach to education for marginalized populations in that it specifies the right of the child with a disability to attend a school that accommodates his/her needs. However, inclusive education – especially as defined here by UNESCO – is about meeting the needs of *all* learners in the classroom. The differentiated ability needs of students may be the

first issue that comes to mind in an inclusive classroom, but linguistic, cultural, or

religious needs may also need to be attended to in order to create inclusivity. In

summarizing their view of inclusive education, Ainscow, Booth and Dyson write:

> [I]nclusion is concerned with all children and young people in schools; it is focused on presence, participation *and* achievement; inclusion and exclusion are linked together such that inclusion involves the active combating of exclusion; and inclusion is seen as a never-ending process. Thus an inclusive school is one that is on the move, rather than one that has reached a perfect state. (2006, p. 25)

This view is also expressed by UNESCO, which sees the intent of inclusion as

enabled "both teachers and learners to feel comfortable with diversity and to see it

as a challenge and enrichment in the learning environment, rather than a problem"

(2003, p. 7).

While the CRPD does not explicitly indicate *what* an inclusive education

should look like, policy documents from the UN can shed some light on their

interpretation of the concept. In the handbook for parliamentarians titled *From

Exclusion to Equality* (UN, 2007), the UN proposes the following tenets of inclusive

education:

- Suitable equipment and teaching materials is provided
- Teaching methods and curricula embrace the needs of all learners and promote social diversity
- Teachers are trained to teach in a classroom of differentiated learners, and encouraged to support each other
- A full range of supports is provided by schools to meet the diverse needs of all students

This publication also suggests that an inclusive philosophy not be limited to

curriculum and teaching, but it notes that this approach is also helpful in thinking

about physical accessibility within the school building and transportation to and from school.

While most of the current international discourse concerning education and youth with disabilities emanates from the United Nations system in the form of a human-rights based approach, there is an older history of international discourse pertaining to disability that also exists in many forms today. The medical model approach to conceptualizing disability focuses on individual deficits to societal norms, and has long existed in the 'West,' with some origin going back to Judeo-Christian scripture and Hellenistic notions of the mind and body (Schuelka, 2013b). Internationally, the medical model was exported heavily, especially during the eugenics movements of the late 19th and early 20th centuries (Richardson & Powell, 2011; Snyder & Mitchell, 2007). The primary vehicle for delivering medical model ideology, however, was the fact that the 'scientific' approach situated knowledge away from the local and an embrace of this thinking signaled 'modernity' (Appadurai, 1996; Fuller, 1991; Giddens, 1990). In Chapter Four, a clear case will be made that the medical model is still very much alive in international discourse and being brought into Bhutan from a variety of sources.

Conclusion

In the preceding sections, it was shown that while the general global discourse on disability rights in education has expanded in scope, there is still a wide variation of interpretation as to *how* to realize those rights. Inclusive education is heterogeneously understood and actualized; it is a set of words looking for context.

Appadurai writes that ideas flow around the globe finding "pragmatic configurations of rough translations" (1996, p. 37). If the understanding of inclusive education at the place of inception – the 'West' – is variable, what happens to inclusive education when it is packaged and transferred?

The other important point of the preceding sections is that Bhutan has experienced profound changes in how education is conceptualized. In the past fifty years, the educational system has gone from a Buddhist monastic system charged with the education of a select few to a modern educational system charged with educating everyone. I argue that this change has implications in how disability is re-conceptualized as Bhutan tries to balance its traditional culture and its modernization aims.

The design of this research is a vertical case study, in that it explores where and how locally-constructed context meets international discourse at different levels. The history and development of Bhutan and its education system is unique, as is the construction of disability. International discourse has constructed disability in a different manner or, as I argue, there are many constructions of disability that flow all together and make interpreting and transferring international discourse contradictory. The Royal Government of Bhutan and the Ministry of Education may use the language of 'global speak' (Steiner-Khamsi, 2010), but why they chose the words they did and how these words like 'inclusive' move from policy to practice is the heart of this research. In the next chapter, I will explain how this research was designed and carried out before moving into Chapter Three, where I explain the theories of educational transfer that inform this dissertation.

CHAPTER TWO: Methodology

Introduction

As introduced in the previous chapter, the research design of this dissertation is a vertical case study modeled on the work of Vavrus and Bartlett (2006; 2009; 2011). These authors build their methodological design considerations on an anthropological approach of exploring 'policy as practice' through multi-sited ethnography within a globalized context (Marcus, 1995; Shore & Wright, 1997; Sutton & Levinson, 2001). This chapter will specify my own methodological considerations in following through on the research questions guiding this dissertation. The first section of the chapter will further elaborate my research questions, as introduced in Chapter One, and explain my research paradigm. The next section will detail and justify Bhutan as a research site and explain the site selection process within Bhutan. Next, I will explain the vertical case study research design before moving into sections explaining data collection and analysis methods. The conclusion of this chapter will address concerns of ethics and 'trustworthiness.'

Research Questions and Paradigm

For the purpose of review and clarification, my research questions are as follows:

- What contextual factors help to explain why the Bhutanese government has recently adopted an education policy for youth with disabilities?
- How is 'inclusive education' being interpreted and enacted by key educational stakeholders in Bhutan (educational administration officials, principals, teachers, students) and through Bhutan's educational policies?
- How are international constructions of disability incorporated or contested in local constructions of disability?

- What structures exist in Bhutanese schools today that 'disable' students?

These questions are informed by the paradigm of social constructivism and its attendant assumption about knowledge production. Crotty (1998) outlines these assumptions as follows: (1) meanings are constructed by human beings as they engage with the world; (2) humans make sense of the world based on historical, societal, and cultural perspectives; and (3) meaning is constructed socially. These assumptions not only fuel how I have framed my research questions but also guide my research design in order to explore the questions themselves.

While my understanding of disability is born from the American context in which I am situated, I am actively aware that disability is a culturally constructed phenomenon and not a biologically-fixed category (Groce, 1985; Ingstad & Whyte, 1995; Stiker, 1999; Snyder & Mitchell, 2006). This notion that disability is constructed and not an a priori truth becomes especially apparent when notions of disability are incorporated into schooling and school policy (McDermott, 1993; McDermott & Varenne, 1995). While the understanding of disability as constructed by cultural and institutional structures may provide an appropriate lens through which to investigate my research questions from an emic perspective, it is important to recognize that local understandings of disability are continuously changing as encounters with other perspectives on disability increase. The chapters that follow show how Bhutanese notions of disability are flexible and changing in response to interactions with global discourses, new national educational expectations, and their own reconceptualizations of modernity. However, cultural change is not

uniform, so this process of reconstruction of disability follows idiosyncratic and heterogeneous pathways.

Site Selection

The study of policy transfer and appropriation of inclusive education policy in Bhutan provides a unique opportunity to observe 'policy as practice' (Sutton & Levinson, 2001) an approach to the study of policy consistent with social constructivism. The selection of Bhutan as a research site was particularly important because it afforded me the chance to examine the complexity of how disability in policy and practice is constructed. This site proved advantageous in several ways. First, Bhutan is unique in that its process of modernization has been actively cultivated and filtered through the government's commitment to Gross National Happiness (GNH). This proves to be a delicate balancing act for policy-making in Bhutan as there is a great desire on the part of its citizens to engage in the 'modern' world but also a weariness of losing the country's unique identity. From a constructivist perspective, this makes Bhutan a particularly good place to study policy as practice in that the tensions of modernizing and maintaining identity are playing out in the current moment. These tensions can be observed now in both policy and in the complex lived-experiences of the Bhutanese people that will be explored throughout this dissertation.

Second, Bhutan is uniquely situated for this study of policy as social practice in that Buddhism is central to the lives of the majority of its people and informs not only the country's cultural expressions and practices but also its policies. Bhutan is

arguably the last Buddhist kingdom in the world, and the government of Bhutan has embraced policies of cultural preservation (and imagination). The strong presence of Buddhism in Bhutan allows me to consider the role of religious identity in national policymaking, as well as allow me to explore religious-socio-cultural constructions of disability. Buddhist and Asian constructions of disability is an under-studied area of culture and disability (Miles, 2000).

The third reason why Bhutan is an excellent research site for this study is that the transition from an entirely monastic elite school system to a secular school system for all children in Bhutan presents dilemmas that get at the very core of what 'schooling' and 'disability' mean, not just in Bhutan but around the world. The modern secular school system in Bhutan is less than 50 years old but has been growing rapidly, replacing a Buddhist monastic system that is over a thousand years old. Whereas monastic education was for a very select few boys and girls, secular education is premised on the 'education for all' philosophy where all youth are expected to attend school and receive a benefit from it. All of these factors make Bhutan not just an excellent case for an anthropological study for its own sake, but it also serves as a case study in which to explore larger and deeper questions pertaining to what educational policies mean to different groups of policy actors, how policies are interpreted when they travel around the world, and how disability policy shapes the meaning of schooling for not just for youth with disabilities but for all youth as policy constructs certain groups of students as abled and others as dis-abled.

The selection of Bhutan as a research site was only the first step in site selection as I then had to decide on sites *within* Bhutan to properly answer the research questions I proposed. While there were no pre-determined sites selected – given the interpretive and emergent research design that will be described below – there were important criteria for site selection that will be explained in this section. First of all, however, I will explain what my role was in Bhutan and its influence on research site selection.

For the 2012-2013 academic year, I was a faculty member at Royal Thimphu College (RTC), lecturing in the Social Sciences Department. During the Spring semester, I served as Program Leader of the Political Science and Sociology Department. RTC is a private college located just outside of Thimphu, the capital of Bhutan, and is affiliated with the Royal University of Bhutan (RUB) higher education system. While the RUB system of colleges is subsidized by the Royal Government – making tuition virtually free for students – RTC charges tuition to its students that is cost-prohibitive for many Bhutanese. Because of my daily interaction with Bhutanese students and other Bhutanese teachers, RTC became my first research site.

My interactions at RTC with students and staff were able to provide me a unique perspective of the Bhutanese education system because I became a part of the system myself. Through my students, I learned about Bhutanese culture and youth perspectives on politics, society, regional economics, Buddhism, dances and rituals, and many other topics that came up in the course of day-to-day interactions. Particularly relevant was that my students were able to convey their educational

experience in the primary and secondary levels prior to attending RTC. Other

Bhutanese faculty members had valuable experience in the education system as

former teachers and administrators, and they were able to share their experiences

with me as well. The majority of these interactions with both faculty and students

constituted informal data collection that occurred at spontaneous moments but

were recorded in my field notes.

My initial process of site selection took me to a number of primary and

secondary schools in the hopes of finding the best ones in which to observe inclusive

education policy in practice. The criteria for selecting school sites were as follows:

- The school is government-run (i.e. "public")
- The school is purposefully engaged in promoting inclusive education
  policy (not necessarily engaged in *correctly following* the policy as given
  to the school by the Ministry of Education)
- The school has identified a portion – not a majority – of its student
  population as having a 'disability'
- The school agrees to allow me to interview parents, teachers, and
  students
- The school is easily accessible from RTC

The research sites that I selected fit and exceeded the above criteria, and they were

able to provide rich ethnographic data through observations – approximately three

times per week – and interviews. In addition to the schools in this study, I also

conducted interviews and observations at many special events and with

governmental officials – both in their offices and also at these special events and

conferences. Table 4 provides a list of research sites in this study:

Table 4: Research Sites

Site Name	Site Designation	Location	Detail of Activities	Date(s)
Royal Thimphu College	College	Thimphu	Place of employment; informal interviews and observations	26 July 2012– 19 July 2013
Thimphu Public School*	Public School (Primary & Middle Secondary)	Thimphu	Primary research site; Observations (multiple class levels); Interviews (students, teachers, Principal, Vice-Principal, parents); Participant (presenter)	17 Sept 2012– 17 July 2013
Thimphu Special School*	Private School (no tuition; all ages) & Civil Service Organization	Thimphu	Secondary research site; Observations (multiple class levels); Interviews (students, teachers, staff)	27 Aug 2012– 26 June 2013
Bhutan Ability Center*	Civil Service Organization	Thimphu	Tertiary research site; Participant (consultant, presenter); Interviews (staff, parents)	12 Mar 2013– 15 July 2013
Inclusive Thimphu School*	Private School (tuition, Primary)	Thimphu	Observation (multiple class levels); Interviews (Principal, teachers, students); Participant (presenter)	11 April 2012; 21 May 2013
Mountain Village School*	Public School (Primary & Middle Secondary)	Outside Thimphu City, but still in Thimphu *dzongkhag*	Observation (multiple class levels); Interviews (Principal, Vice-Principal, teachers, students)	17 July 2013
Bhutan Foundation	Civil Service Organization	Thimphu	Interviews (staff)	20 Nov 2012; 20 June 2013; 15 July 2013– 17 July 2013
International Day for Persons with Disabilities Event	Special Event	Thimphu	Observation; Interviews (students, parents)	3 Dec 2012
Disability Forum	Conference	Thimphu	Observation	3 Dec 2012

Workshop on Management of Speech and Developmental Disorders in Children	Conference	Thimphu	Observation	5 Dec 2012– 7 Dec 2012
Autism Awareness Day Event	Special Event	Thimphu	Observation	2 April 2012
UNICEF	Civil Service Organization	Thimphu	Interviews (staff)	7 May 2013
Ministry of Education; Special Education Unit	Government Organization	Thimphu	Interviews (officials)	17 May 2013
Royal University of Bhutan	Government Organization	Thimphu	Interviews (officials)	13 June 2013
Family Health Forum (Special Olympics Event)	Conference	Thimphu	Observation	26 June 2013
Regional Conference on Inclusive Education with a Focus on Children with Disabilities	Conference	Paro	Observation	3 Dec 2013– 5 Dec 2013

* Denotes pseudonym is used

Research Design

The vertical case study design proposed by Vavrus and Bartlett (2006; 2009; 2011) fits well with my research questions as this dissertation seeks to understand inclusive education policy as a phenomenon *in* Bhutan and *through* Bhutan. In defining a vertical case study, Vavrus and Bartlett write that it is a "multisited, qualitative case study that traces the linkages among local, national, and international forces and institutions that together shape and are shaped by education in a particular locale" (2009, pp. 11-12). They also introduce the idea of a

transversal axis in a vertical case study that seeks to compare across time and space: "The transversal element reminds us to study *across and through* levels to explore how globalizing processes intersect and interconnect people and policies that come into focus at different scales" (Bartlett & Vavrus, forthcoming; emphasis in original). The inspiration for a three-dimensional policy analysis model comes from Bray and Thomas (1995) but has been expanded upon by Bartlett and Vavrus, who summarize the three comparative dimensions of a vertical case as follows:

- Compare across time – situating educational processes historically
- Compare vertically – tracing policy appropriation and implementation across macro-, meso-, and micro-levels
- Compare horizontally – contrasting how similar policies, pedagogies, and/or discourses are differentially instantiated across space. (2011, p. 5)

The vertical case study is better situated to explore my research questions rather than, for example, a multiple site case study. This is because the multiple site case studies require replication, meaning one must have a variety of sites in which to observe a similar policy implementation and/or phenomenon (Yin, 2009). The pursuit of cases of inclusive education policy appropriation across schools in Bhutan would move my dissertation into the realm of evaluation, looking at how inclusive education policy has been implemented in different sites and away from my primary interest in how Bhutan's policy reflects, at one level, the cultural reflexivity of global 'policyscapes' (Carney, 2009) and, at another level, the appropriation of policy by local actors. The difference is subtle, but palpable.

With a vertical case study as the overall theoretical research design of this dissertation, an ethnography of inclusive schooling serves well as the method of collecting and analyzing data. According to Fife (2005), ethnographic research in

anthropology is concerned with formulating a pattern within the given context of a specific time and place. However, as Marcus (1995), Kearney (1995), Piot (1999), and others argue, micro-level ethnography is no longer enough to understand local contexts given that culture is not fixed but, rather, is fluid and linked to larger global processes. Thus, an ethnography of policy within a vertical case framework recognizes that "the 'global' is always a 'local'" (Bartlett & Vavrus, forthcoming).

At the macro-level unit of analysis in this study are policy-makers in Bhutan and their documented policy discourses. These actors include members of Parliament, the Royal Government, and ministers of relevant departments – in this case, the Minister of Education. Most helpful here, as well, is a historical document analysis. Governmental educational policies, documents from the Ministry of Education, speeches and editorials by officials, as well as secondary sources from other research conducted in Bhutan are extremely helpful in analyzing how inclusive education entered policy discourse and how it is interpreted. Fife (2005) argues that documents that provide historical and contemporary context are crucial to any ethnography.

At the meso-level unit of analysis, the participants of interest include those tasked with interpreting policy language and creating a guiding framework for policy as practice. These actors include those that develop curricula at the Ministry of Education but also, to a great degree, the administrators and principals in Bhutanese educational districts and schools. While in theory Bhutan has a centralized educational system, the realities of geography and infrastructure mean that monitoring and dissemination of policy from the Ministry of Education to

schools is widely variable and greatly affected by the individual relationships between school officials and policy-makers in Thimphu. At this level, then, is an especially important understanding into how policy discourse becomes localized.

Finally, at the micro-level unit of analysis is the school and, especially, the classroom. Many educational anthropologists have made the argument that the classroom becomes an important space that situates itself between and amongst the global and the local (e.g. Anderson-Levitt, 2003; Fife, 2005; Levinson & Holland, 1996; Spindler, 1967). Global flows and 'policyscapes' (see Chapter 3) make their way through these levels down into the classroom, ultimately filtered through the teacher's lived experience, pedagogical beliefs, and level of training. However, policy discourse may appear to project power from the top down, but the study of policy as practice shows that policy is a process of negotiation between structure and agency. In other words, "Practice gets at the way individuals, and groups, engage in situated behaviors that are both constrained and enabled by existing structures, but which allow the person to exercise agency in the emerging situation" (Sutton & Levinson, 2001, p. 3). Thus, the classroom site becomes the prima facie for observing how the policy of inclusive education is practiced.

Data Collection

The techniques for data collection at the three levels of analysis in a vertical case study include interviews, observation, and policy document analysis. Initially, most of my efforts in identifying informants and understanding cultural dynamics were informal. Bernard (2011) identifies this as the first step in ethnographic

interviewing, a technique that is "the method of choice at the beginning of participant observation fieldwork" (p. 156). Once the researcher is settled in his/her site, Bernard advocates moving into an unstructured interview format. This comprised the majority of my interviews once I became known among policymakers, school administrators, and teachers at the research sites. Unstructured interviewing is not an informal, anything goes, data collection method. Rather, unstructured interviews are conducted by the researcher with a clear plan but with a minimum of control over informant responses. Bernard (2011) notes, "The idea is to get people to open up and let them express themselves in their own terms, and at their own pace" (p. 157). This is also called ethnographic interviewing and is used predominantly in the field of anthropology.

The majority of the unstructured interviewing for this dissertation took place at the school level. This included parents, teachers, students, and school officials. The overarching question in this study is *what is 'disability' in Bhutanese culture and how does inclusive education shape, and how is it shaped by, 'disability' construction in Bhutan?* This was not a question that I asked participants directly as research questions reflect the discipline and methodological choices of the researcher (Agee, 2009). Instead, many of the questions I asked parents and teachers were guided by the framework of Ingstad and Whyte's edited volume, *Disability and Culture* (1995). In their book, they (introduce three characteristics of social organization relevant to disability:

> *"What is the ability for a family to care for an infirm member?"* This question allows the structure of the interviews to examine family relationships as related to social, economic, and educational experiences. For example, where is the 'cost' in caring for a kinship-member with a disability? Is it a loss of

cash or productivity or is there no cost at all? How does family dynamics related to household productivity create or disperse notions of the 'disabled' person? (p. 14)

"How does the occupational [and social] structure of the society incorporate people with impairments?" This question relates to the first in that it examines economic relationships and how these can construct disability. As Ingstad and Whyte note, "When labor is a commodity sold on a competitive market in fixed time and skill units, the participation of people with disabilities is more problematic" (p. 15).

"Are there special programs, institutions, and organizations for persons with disabilities [outside of the family]?" As noted by many scholars (e.g. Snyder & Mitchell, 1996; Stiker, 1999), shifting societal resources of care from the family to the state has created new conceptualizations of disability. This question is linked through the previous two questions in that if an economic system creates an ability-valuation model, the burden on the family becomes too great to sustain its less-productive members. In the case of Euro-American countries, this has led to the state stepping-in to institutionalize disability and assuming a greater role in deciding whom is disabled and who is not disabled. (p. 15)

To their questions I added a few of my own:

What religious and/or cultural narratives explain the presence of human difference? How societies conceptualize the causes and effects of disability goes a long way in constructing social structures to account for difference; what is 'normal' and what is 'deviance' (Stiker, 1999). Is disability a curse? A blessing? An opportunity for charity? For justice? For compassion? The manner in which religious/cultural narratives answer these questions helps construct disability in society.

Is school for all children, or only for those that would stand to benefit the most from academic training? Cultural conceptions of school also construct what kind of student should be there and how they will benefit (McDermott, 1993). Does inclusive education policy problematize this construction? How do Bhutanese citizens view the purpose of school and is that view changing?

These questions only informed the background and structure of the informal interviews that I conducted with teachers and parents, and were not the exact questions I asked of them.

Interviews that sought to explore the policy transfer aspect of this

dissertation, i.e., research questions one and two and the macro- and meso-levels of

the vertical case study design, were conducted in a semi-structured fashion. This is

typically the format of choice for professional meetings with high-level officials

(Bernard, 2011), and semi-structured interviews involve a mix of more or less

structured questions that are guided by a list of pre-determined questions or issues

(Merriam, 2009). In this case, I advance that Rivzi and Lindgard's (2010) key

questions to analyzing educational policy in a globalized context provide an

excellent protocol of questions to explore policy transfer in Bhutan. A list of these

questions can be found in Appendix F. In sum, the research participants who

engaged in unstructured and semi-structured interviews can be found in Table 5

(please note that some positions are purposely vague in order to maintain

anonymity):

Table 5: Research Participants

Position (number of people)	Site(s)
Director (1)	Bhutan Ability Center
Special Education Advisors (2)	Bhutan Ability Center
Social Workers (6)	Bhutan Ability Center
Education Specialists (7)	Bhutan Foundation
Program Officers (3)	Bhutan Foundation
Special Education Director (1)	Thimphu Public School
Principal (1)	Thimphu Public School
Vice Principal (1)	Thimphu Public School
Class I Teacher (1)	Thimphu Public School
Class II Teacher (1)	Thimphu Public School
Special Education Teachers (6)	Thimphu Public School
Program Officer (1)	Thimphu Special School
Director (1)	Thimphu Special School
Principal (1)	Inclusive Thimphu School
Principal (1)	Mountain Village School
Vice Principal (1)	Mountain Village School
Historian/Researcher (1)	Thimphu, Bhutan
Chief Program Officer (1)	Ministry of Education

Officials (2)	Ministry of Education
Lecturer (1)	Paro College of Education
Official (1)	Royal University of Bhutan
Specialists (3)	UNICEF
Physical Therapists (2)	Jigme Dorji Wangchuck National Referral Hospital
Students (approx. 40)	Thimphu Public School; Thimphu Special School; Inclusive Thimphu School; Mountain Village School
Teachers (approx. 20)	Thimphu Public School; Thimphu Special School; Inclusive Thimphu School; Mountain Village School
Parents (approx. 20)	Bhutan Ability Center; Thimphu Public School;

The third major source of data in this vertical case study is the use of documents and other cultural 'artifacts.' Documents are a good source of data before, during, and after conducting work in the field. Merriam (2009) identifies three reasons that documents are key to any qualitative study: (1) documents may be the best source of data on a particular subject, especially when it comes to gathering historical information; (2) data found in documents can be used in the same manner as data from interviews or observations; and (3) documents are stable sources of information and, unlike interviewing and observation, the presence of the investigator does not alter what is being studied. These policy documents and other 'artifacts' are documented throughout this dissertation and can be found in the Reference Section. A complete list of policy documents and 'artifacts' can be found in the table below:

Table 6: Relevant Policy Documents and 'Artifacts'

Document Name	Organization	Year Published	Kind of 'Artifact'
Rules and Regulations	Department of Curriculum, Research, and Development	2013	Policy Guideline
Education Sector Strategy: Realizing Vision 2020	Department of Education, Ministry of Health and Education (outdated)	2003	Strategic Plan

Tenth Annual Education Conference (7-12 January, 2008): Report and Resolutions	Ministry of Education	2008	Proceedings
A Study on Enrolment and Retention Strategies in Bhutan	Ministry of Education	2009	Applied Research
Annual Education Statistics	Ministry of Education	2012	Applied Research
Educating for Gross National Happiness: A Training Manual	Ministry of Education	2012	Policy Guideline
National Policy on Special Educational Needs (Draft)	Ministry of Education	2012	Policy
Two-Stage Child Disability Study Among Children 2-9 Years: Bhutan 2010-2011	UNICEF & National Statistics Bureau	2012	Applied Research
Bhutan Millennium Development Goals Needs Assessment and Costing Report (2006-2015).	Royal Government of Bhutan	2007	Strategic Plan
Bhutan 2020: A Vision for Peace, Prosperity and Happiness	Royal Government of Bhutan	1999	Strategic Plan
Ninth Five-Year Plan	Royal Government of Bhutan	2002	Policy
Tenth Five-Year Plan	Royal Government of Bhutan	2009	Policy
Gross National Happiness Commission: Five Year Plan	Royal Government of Bhutan	2011	Strategic Plan
National Education Framework (NEF): Shaping Bhutan's Future	Royal Education Council	2012	Strategic Plan

Convention on the Rights of Persons with Disabilities	United Nations	2006	International Initiative
Consideration of a Regional Framework for Action Towards an Inclusive, Barrier-free and Rights-based Society for Persons with Disabilities in Asia and the Pacific	United Nations Economic and Social Commission for Asia and the Pacific [UNESCAP]	2003	Regional Initiative
Incheon Strategy to "Make the Right Real" for Persons with Disabilities in Asia and the Pacific	UNESCAP	2012	Regional Initiative
The Salamanca Statement and Framework for Action on Special Needs Education	UNESCO	1994	International Initative
Overcoming Exclusion Through Inclusive Approaches in Education	UNESCO	2003	International Initiative

The primary policy document that was used for analysis was the National Policy on

Special Educational Needs (MoE, 2012c), which is currently in draft form awaiting

ratification by the Bhutanese parliament. Older documents are noted throughout the

dissertation and were primarily used to document historical and contextual

education discourses in Bhutan, especially around students with disabilities.

Specifically, I was interested in the language used by these policy documents and

what values were espoused in relation to both local and international discourses.

Data Analysis

In qualitative research, the separation between data collection and data analysis is somewhat nebulous. Merriam (2009) argues that the preferred qualitative method is to analyze data simultaneously with data collection. The reason for this confluence of collection and analysis has to do with role of the researcher as primary data instrument. As the researcher conducts interviews and observations, patterns emerge and should be notated immediately in the field notes. Fife (2005, p. 74) advises, "What you are looking for are repetitive themes that you believe are likely to have important effects upon the lessons that students are learning in classrooms settings, whether these themes involve manifest or hidden curriculum." This kind of immediate analysis for themes occurred many times in my field notes, which I would denote by drawing a thought-bubble around my analysis to separate it from strictly an observation. Soon after an interview or observation, I would also go through and highlight anything that seemed particularly interesting or relevant that I could later follow up in subsequent interviews and observations.

Thus, open coding occurred in the field, as well as returning from the field. To be clear, 'coding' in ethnographic research means an indexing device to identify themes and patterns in the data (Bernard, 2011). Open coding is a manner in which the researcher recognizes emergent themes as they happen in the field, where it is important not to limit initial findings (Fife, 2005). Codes are large categories, and the researcher should remain open to discovery of themes. Corbin and Strauss (2008) write, "Open coding requires a brainstorming approach to analysis because,

in the beginning, analysts want to open up the data to all potentials and possibilities contained within them" (p. 160).

Returning to Minnesota in July of 2013, I began the task of organizing my field notes and all of the materials and 'artifacts' gathered from a year in Bhutan even though I had been doing some coding throughout the year. This more intensive analysis involved taking observational and interview data and placing them in various categories and codes until the most important themes emerged. This is what is called "whole-text inductive analysis" (Ryan & Bernard, 2001, p. 274). The last step in my analysis was discerning themes and categories that were chosen over others to represent the core findings. This is also the point in the analysis when propositions and narratives come into focus. Charmaz (2006) notes that this level of analysis places categories into theoretical concepts both novel and existing. Indeed, it is the idiosyncrasies in theories, concepts, and patterns that make ethnographic research so interesting.

Going into the field with theoretical notions already in mind guided some of my initial codes. At the same time, the inductive nature of this research remained open to new codes and information apart from strictly looking for certain theoretical affirmations or disjunctures. As I will explain in Chapter Three, there are several major bodies of theoretical literature around the concept of educational policy transfer. Both the world culture and world-systems theories come from sociological backgrounds that make grand claims about global transfer processes. The global constructivists, on the other hand, observe multi-level instances of resistance, knowledge-making, agency, and indigenization of educational policies

that complicate macro-sociological theories. As Fife (2005) explains, "Theory is both 'made' and 'tested' in ethnographic research" (p. 139). In this dissertation, that is exactly the case.

Ethics, Limitations, and Trustworthiness

One of the main reasons that I employed the vertical case study as my research design is to counteract the tendency of globalization studies to present the world as a series of binaries: global/local, East/West, individualism/collectivism, traditional/modern, etc. I believe this to be a matter of research ethics. The original proponents of the vertical case study design, Vavrus and Bartlett (2009), suggest that by examining global phenomenon in three dimensions, the 'sharp boundaries' between constructed binaries begin to break down.

The trap of binarism is a conscious concern in this dissertation. Ong's *Flexible Citizenship* (1999) provides an example of how to break these black-and-white patterns of thinking. She writes, "'non-western' cultures are not disappearing but are adjusting in very complex ways to global processes and remaking their own modernities" (p. 240). The work of Piot (1999) in his book *Remotely Global* is another reminder of looking beyond the binary frame. His book rejects culture as a static and bounded unit. In the book's conclusion, Piot writes,

> [I]f … tradition owes its present form to, and derives its meaning from, modernity as much as from anything local or 'indigenous,' it becomes analytically impossible to separate the two. Where does the 'traditional' end and the 'modern' begin? Where is there an 'outside' to modernity's 'inside'? Where is there a 'local' that is not also 'global'?" (p. 173).

Not being a Bhutanese cultural 'insider' presents a challenge in understanding the subtleties and recognizing the idiosyncrasies of its individual members. Having an etic perspective does, however, have the potential to open up an understanding of Bhutanese cultural dynamics that often becomes taken for granted from its members. Bernard (2011) suggests that the researcher try to consciously switch back and forth between emic and etic perspectives to the greatest extent possible. To help facilitate this process, I employed a Constant Validity Check (Bernard, 2011, p. 339), which includes the following guidelines:

1. Look for consistencies and inconsistencies among informants when interviewing and find out why those informants disagree.
2. Check people's reports of behavior or of environmental conditions against more objective evidence (i.e. fact checking).
3. Be open to negative evidence.
4. Seek out alternative explanations from key informants and colleagues.
5. Try to fit extreme cases into your theory [or, at least, explain them].

Despite all of the preparations and attempting to effectively design this research to counter any threats to validity, there were several limitations that may have affected my interpretations. First, I do not possess the fluency in Dzongkha necessary to conduct interviews and analyze data in that language. However, this proved to be not as serious an issue as I originally anticipated as English is quite common, and teachers, officials, administrators, and most students were fluent in it. There were only a few times that I had to rely on translation from a third-party but, not having a command of Dzongkha, or other languages of Bhutan, meant that I may have missed the subtlety and nuance of the full range of opinions and expressions from my research participants. I also undoubtedly missed conversations in Dzongkha that may not have been meant for my ears and analysis.

The second limitation in conducting this research is the bias towards sites based in Thimphu. This became a necessity as my position at Royal Thimphu College – while enabling my entry into Bhutan in the first place – restricted my movement. The topography of Bhutan is formidable, and travel across the country is difficult. For example, Bhutan is a country about the size of Switzerland, but it takes at least three solid days of driving to get from one end to the other. Unfortunately, when the college was out of session so, too, were all of the other schools in Bhutan. However, the majority of schools and services related to disability are located in Thimphu, so I was fortunate to be located there and not elsewhere in Bhutan. Nevertheless, I missed out on the rural experience relating to disability. I tried, as best I could, to ask research participants about the rural experience and to gather materials and writings related to this experience. My field research at Mountain Village School is an attempt to try to understand this rural reality through my own experience.

In conclusion, through recognizing my biases, and 'outside' status, the methodological choices I have made in designing and carrying out this research have attempted to counteract any issues in trustworthiness or ethical issues regarding simplistic binaries. The design of the vertical case study encourages 'fuzziness' between analytical levels and does not shy away from the horizontal complexity of intracultural variation. I take to heart Fife's (2005, p. 133) advice to the neophyte ethnographer, "inconsistencies often make the ethnography stronger in the long run, adding idiosyncratic dimensions and enlarging our understanding of the complexities of social and cultural patterns." In the following chapter, I turn to

the theories of globalization and education that shaped the etic categories in my

analysis and my assumptions about policy transfer.

CHAPTER THREE: Policy Transfer: Theories, Ideas, Contestations

Introduction

Understanding the process of educational policy transfer – either through borrowing, lending, learning, or imposition (Dale, 1999) – has been of interest in comparative education research since the inception of the field. In recent decades, however, the reason for this interest is due to both a pursuit of universal 'best-practices' in educational policy and pedagogy and also a fascination with exogenous/endogenous relationships or, to put in Arnove's term (2007), the 'global-local dialectic.' While these two pursuits generally define the field of comparative education, they also represent a paradigmatic divide within the body of literature between those who seek to discover and export universal educational practices and those that believe there is no 'universal' but rather subjective lived experiences to be explored. C. Arnold Anderson argued fifty years ago for a universality of research variables: "We must find the means for procuring definite cross-cultural measures of achievement, and for comparable groups, before we can interpret information about curricula or teaching methods" (1961, p. 10). However, fifty years *before* Anderson, in 1900, Michael Sadler implored us to remember locality and culture in the following quotation:

> If we propose to study foreign systems of education, we must not keep our eyes on the brick and mortar institutions, nor on the teachers and pupils only, but we must also go outside into the streets and into the homes of the people, and try to find out what is the intangible, impalpable, spiritual force which, in the case of any successful system of Education, is in reality upholding the school system and accounting for its practical efficiency. (cited in Bereday, 1964, p. 309)

This on-going debate in the field of comparative education is important to consider because it is influential in how scholars theoretically view education and its place in understanding the globalized policy landscape relevant to the formation of inclusive education policy in Bhutan.

In this chapter, I explore three distinct theoretical viewpoints from which to observe the process of educational policy transfer. The first viewpoint is that of neo-institutionalism, herein referred to as *world culture theory* as this is the term often used to describe it. This theory describes/explains a global convergence of educational policy through mimetic processes enacted by nation-states, meaning that states appear to have similarly constructed the institution of education in particular ways. The second viewpoint draws on Marxist scholarship on dependency, specifically the theory of *world-systems*. In this theory, global educational policy is also viewed as a means of convergence but through a much more coercive process. Policy becomes enacted by 'peripheral' nation-states due to the economic arm-twisting of 'core' nation-states through development aid and other unequal capitalistic relationships that favor 'core' countries to the detriment of those in the periphery. The last viewpoint I will explore is one which does not have an established name in comparative education, but which I call *global constructivism.* It is based upon the ideas of a group of scholars in anthropology and policy studies that view educational policy transfer as a socio-cultural, local, and post-national process enacted for context-specific reasons. The scholars from this perspective do not reject completely the view that policies are borrowed or 'travel' from one country to another, but their interest is in how policies, largely developed

in the global north, are reinterpreted and appropriated by policy actors in specific

national and local contexts.

I will begin this chapter with a discussion on the concept of 'educational

policy transfer' because it is a process described by the three viewpoints but

employed in different ways. I then move to the three theoretical viewpoints

themselves – world culture theory, world-systems theory and global constructivism

– and conclude by arguing that an 'anthropology of policy' as exemplified by some

global constructivist scholars, coupled with the vertical case study approach, is the

most appropriate for answering my research questions.

Understanding Educational Policy Transfer

Perry and Tor (2008) define educational transfer as "the movement of ideas,

structures and practice in education policy, from one time and place to another" (p.

510). While Dale (1999) has identified at least seven mechanisms by which policy is

transferred globally, the literature on transfer in comparative education can be

summed up in three main processes. The first process is that of *borrowing and*

lending. Policy decision-makers typically first look for politically-acceptable policy

solutions within their own political situation and, when none are found, they look

abroad for a specific policy to borrow to address a specific problem (Robertson &

Waltman, 1993). This is similar to Schriewer's idea of 'externalization' in which

"government's borrow policies at times and in situations when an external

reference is needed to bolster the legitimacy of the government and its policies"

(cited in Luschei, 2004, p. 161). In general, borrowing and lending studies examine

external policies borrowed in order to solve a particular problem in a national education system. An example of explicit policy borrowing can be observed in the South African borrowing of outcomes-based education policy from the United States, New Zealand, and other Western countries (Spreen, 2004). Waldow, in a study on educational policy borrowing in Sweden, found a more subtle form of borrowing he termed 'silent borrowing' (2009) and suggests even local actors may not be aware that they are tapped into the international policy discourse.

The second process is that of *policy learning*. Key to understanding policy learning is identifying 'traveling policies' (Lindblad & Popkewitz, 2004), or educational policies held up as 'best-practices' in education. Policy learning typically appears voluntary but can be interpreted as coercive depending on the motivations of the policy actors and the conditionalities placed upon them by external organizations. While this is similar to policy borrowing, policy learning is a political process not necessarily aimed at solving specific educational problems, but rather it signals particular political ideologies or expresses a desire to appear 'modern.' This is often a mimetic or imitative process that is of particular interest to world culture theory (see below). As Fuller writes, "... in order to look modern and to signal mass opportunity the Third World state must express faith in, and materially expand, schooling" (1991, p. 3). However, these signals of modernity may be in name only in order to secure international support, legitimacy, and funding. Phillips (2004) describes policy learning as 'phony borrowing,' and Ganderton (1996) sees this as 'policy mimicry'. Of course, 'policy mimicry' does not comprise the entirety of policy learning. For example, the decentralization of school management to the local level

is a particular ideological policy that has seen much convergence internationally, even if those nations who picked up the flag of decentralization might not have had a school management problem to begin with (Astiz, Wiseman & Baker, 2002). This concept will be expanded in the next section of this chapter on world culture theory.

The last process by which educational policy transfer occurs is what Dale (1999) terms *policy imposition*. This term suggests an external educational policy that is required or forced through the power of an external actor onto national or local authorities. For example, the Structural Adjustment Program (SAP) imposed by the World Bank in Tanzania in the 1980s required the Government of Tanzania to charge school fees for cost-recovery of educational services (Vavrus, 2005). This type of policy coercion is often studied by world-systems scholars and will be expanded upon in that section below. In sum, there are different ways that policies are transferred, and each of the three viewpoints below emphasizes one over the others even though there are some points of intersection or examples of multiple processes being examined by scholars in any given grouping. In the next section, I will begin my discussion of these viewpoints with world culture theory and its vantage point on educational policy transfer.

World Culture Theory: Convergence and Internationalization of Education Policies

The idea of an educational policy developed in one country or institution – such as the United Nations – possessing attraction for other countries and institutions lies at the heart of world culture theory. Originating from Stanford sociologists John Meyer, Francisco Ramirez, and their colleagues and students, world culture theory is

macro-sociological and post-positivist in its design. This means that there is some attempt to provide a grand theoretical explanation for the way the world – particularly the world of education and policy – works but also recognizes that claims of knowledge on human behavior can never be 'positive.' In this case, world culture theory is interested in how and why education has come to look very similar across countries today. In this section, I will explain the main tenets of world culture theory, its relationship to educational policy transfer, and discuss some of the critiques of this theory.

World culture analysis takes as its starting point Western Europe several hundred years ago and focuses on how the idea of education as a state institution expanded first within Europe and later across the globe. On world culture theorists, Fuller writes, "they claim that mass schooling exercises an institutional life of its own, legitimated and reproduced within the Western state's logic which now transcends national boundaries" (1991, p. 44). Ramirez and Boli (1987) suggest that the institution of education was of interest to European states in order to foster nationalism, promote a common national language, train the population to fulfill the stratified labor-market of industrialization, to pull the state further into secularization, and to link individual meritocracy with the national interest. These ideas were advanced most significantly by Prussia and the Nordic countries during the nineteenth century. Education as a state interest began in earnest during the expansion of capitalism and industrialization.

World culture theory recognizes that the European model of state-sponsored mass education has proliferated across the globe, but it does not assume that history

had to unfold in this way. For instance, Ramirez writes, "There was nothing inevitable about Western ascendancy nor is there any reason to believe that this is a permanent world condition" (2003, p. 250). After 1945 (post-World War II), they argue that the world has experienced even greater convergence of educational policy in that schools today generally look the same across the world and governments typically finance and support them centrally. In other words, the state's educational institutions promote "rationalized modernity" through education to a degree far greater than in traditional educational institutions such as the family, village, or religious center (Meyer, Boli, Thomas & Ramirez, 1997, p. 174). A key term that world culture theorists use to explain this convergence in education is isomorphism, or institutional similarity across nations (see DiMaggio & Powell, 1983).

In her description of world culture theory – before she critiques it – Anderson-Levitt (2003) offers an excellent overview of its isomorphic vision of common schooling. First, world culture theory helps to explain shared ideals throughout much, if not all, of the world today, such as education as a universal human right, schooling as a meritocracy to reward individual development, and that education can provide real opportunities. Second, it draws attention to the similarity in the basic structure of education in that it is typically compulsory, run by a centralized education ministry or department, and that this central institution collects educational statistics in order to monitor policy implementation. Third, world culture theory highlights the fact that schools appear very similar globally with graded classrooms typically full of desks and chairs and a teacher in front of a

blackboard. Moreover, school content and instruction are similar around the world with an emphasis on curriculum and whole-class instruction.

As evidence of this trend towards isomorphism, world culture theorists point to a precipitous rise in school enrollment rates and an increasing homogeneity in educational curricula during the twentieth century (Ramirez, 1997). For example, in a historical study of higher education, Schofer and Meyer (2005) found that in 1900, 500,000 students globally were attending an institution of higher education. This represented about 1% of the global population. In 2000, 100 million students were attending an institution of higher education. This represents about 20% of the global population. For other evidence of the rise in educational homgeneity, Ramirez and Boli (1987) present six arguments that they use to support world culture theory. First, recently formed nation-states tend to quickly create educational ministries. Second, nation-states are increasing funding and regulation of education. Third, school enrollments have risen in every nation-state regardless of economics or political-structure. Fourth, national and individual development has become more legitimate than the preservation of status, cultural or religious values. Fifth, the quantity and quality of education has increased around the world. And sixth, the use of educational reform as a solution to national problems has been increasing everywhere around the globe.

The mechanisms of educational policy transfer as explained by world culture theory assume that national educational structure operate as open systems capable of change. Ramirez concludes, "Nation-states are thus not just 'open systems' but model driven and script enacting ones. The models are universalistic in character:

all nation-states are imagined to be capable of attaining progress and justice" (2006, p. 372). World culture theorists believe that these scripts – here, educational policies – can be transferred through three processes. First, there are mimetic processes that involve the imitation of policies from elsewhere. Second, there are normative processes that speak to the policy learning mechanism discussed in the previous section. The third process is that of coercion, which is recognized by world culture theory but features more prominently in world-systems theory discussed below. World culture theory tends to downplay global power differentials because it believes in the autonomy of the nation-state. To this point, Ramirez argues:

> Instead of assuming extraordinarily incompetent dominant actors, world culture theory assumes that they too are constructed and constrained by the world cultural frame within which they operate. World culture theory focuses not on the power of the actors but on the power of the culture itself ... World culture theory underemphasizes both coercion and imitation in favor of enactment. (2003, p. 251)

In world culture theory, these processes of educational policy transfer can be predicted through the individual nation-state's 'linkages,' or connections, to the world polity populated by international non-governmental organizations (INGOs), trans-national corporations (TNCs), and intergovernmental organizations (IGOs). Boli and Thomas (1997) found that the extent of a state's linkages to these organizations increased the chance that the nation-state considered themselves 'world citizens' and that the state enacted isomorphic, or structurally similar, educational policies. Other studies have found that the extensiveness of these linkages predict the likelihood that nation-states will borrow policies such as gender equity in the sciences and human rights education programs (Ramirez & Wotipka, 2001; Suarez, 2007). It is important to note that world culture theory views the

nation-state as the most important unit of policy analysis. Benedict Anderson's oft-cited book, *Imagined Communities* (1983/2006), provides world culture theory with the important concept of the nation-state as an imagined space, one where the institution of education strives to create and define its spatial and cultural boundaries.

More recently, world culture theorists have recognized that there can be a gap between 'policy speak' and 'policy implementation.' For instance, nations are adopting and ratifying human rights treaties in greater and greater numbers (policy speak), but many lack the resources to actually carry these ideas into practice. World culture theorists label this as *decoupling* (Meyer, Boli, Thomas & Ramirez, 1997). The notion of decoupling seems to be in response to critiques of world culture theory as a normative interpretation of the actions of states in relation to policy rather than one grounded in the reality of policy practice. One such criticism of world culture theory to which decoupling responds comes from Dale, who believes world culture theory to be "lacking in any effective and demonstrable outcomes on individual states beyond a kind of lip service compliance" (1999, p. 15). This critique has been further explored in educational anthropology and, in particular, in Anderson-Levitt's edited volume, *Local Meanings, Global Schooling.* She writes, "Not surprisingly, our case studies and many others point to huge gaps between a model (or models) and actual practice on the ground. One reason is that actors at various levels in importing nations sometimes resist a reform" (2003, p. 16). Steiner-Khamsi and Stolpe, in their book *Educational Import,* suggest that world culture theorists "turn a blind eye to educational systems from other world-systems

that are quite different thereby assume that there is only one world-system" (2006, p. 5). Indeed, Schriewer and Martinez (2004) found that educational policy borrowing, at least in the academic community, had more to do with the political realities and alliances of their geographical location in the world rather than their connection to the world-polity. These critiques are revisited in the discussion of global constructivism. In the next section, however, I will explore world-systems theory and compare and contrast it with world culture theory.

World-Systems Theory: The World Capitalist Economy and Its Discontents

Some of the general characteristics of world-systems theory are similar to world culture theory discussed in the previous section. Both theories present grand sociological meta-narratives assuming that the world is a system made up of nation-states. In his book *Historical Capitalism*, Immanuel Wallerstein – the main proponent of this theory – writes, "Each state had formal jurisdiction over its own frontiers of the movement of goods, money-capital, and labour-power. Hence, each state could affect to some degree the modalities by which the social division of labour of the capitalist world-economy operated" (1983, p. 49). To Wallerstein, the world is a complete system divided into nation-states that comprise the world-economy. He explains, "there are many political units inside the world-economy, loosely tied together in our modern world-system in an interstate system ... this does not mean that they do not evolve some common cultural patterns, what we shall be calling a geoculture" (2004, p. 23). This general statement is not terribly

distinct different from world culture theory in that Wallerstein intends 'geoculture' to mean roughly the equivalent of a world culture.

The main point of departure between world culture theory and world-systems theory is that Wallerstein (1976) believes that the capitalist world-economy has produced three relatively stable structural positions in which nation-states are located based on their centrality, or lack thereof, in the world capitalist system: core, semi-periphery, and periphery. This capitalist system has its origins in sixteenth century Europe and set up the modern world-economy with unequal capital exchange whereby the core countries benefited at the expense of peripheral country development (Wallerstein, 1974/2011). Frank famously called this the "development of underdevelopment and ... underdevelopment of development" (1969/2007, p. 84). Wallerstein (1983) argues that peripheral countries were forced to conform to the rules and conditions placed upon them by the core, or else they faced substantial consequences.

While there have existed in history sub-cultures or complete sub-systems separated from each other in the world, world-systems theorists believe that these small systems no longer exist, and modernity is characterized as a dominant single capitalist system (Peet & Hartwick, 2009). For instance, Wallerstein (1976) argues:

> There are today no socialist systems in the world-economy any more than there are feudal systems because there is only *one* world-system. It is a world-economy and it is by definition capitalist in form. Socialism involves the creation of a new kind of world-system, neither a redistributive world-empire nor a capitalist world-economy but a socialist world-government. (p. 415)

Later, Wallerstein would revise, but not fully reject, this singular vision to

encompass a plurality of worlds contained within the singular one. Writing in 2004,

Wallerstein explains the hyphen and the plural in world-systems:

> Note the hyphen in the world-system and its two subcategories, world-economies and world-empires. Putting the hyphen was intended to underline that we are talking not about systems, economies, empire of *the* (whole) world, but about systems, economies, empires that *are* a world (but quite possibly, and indeed usually, not encompassing the entire globe). (p. 16)

 This revision demonstrates that world-systems theory – like world culture theory –

is dynamic and evolving. However, they differ quite significantly in how they view

the use of political power and influence. World-systems theory interprets world

relations as the coercion of the peripheral countries by the core countries through

the capitalist world-economy. Of course, this leaves both of these theories open to

critique from those who are skeptical of grand social theories, as will be discussed

later in the chapter.

Arnove was an early advocate for using world-systems analysis in the study

of educational policy in comparative education. He contends that education around

the world is interconnected and joined together by an "international network of aid

and knowledge diffusion" (1980, p. 51). Wallerstein agrees with this assessment of

education's place in world-systems theory, writing, "The primary schools were the

lodestar of the liberals ... They turned workers and peasants into citizens who

possessed the minimum capacities needed to perform national duties" (2004, p. 66).

World-systems theory has been used by many scholars in comparative education to

explain the dynamics between core nations and peripheral nations when it comes to

educational policy transfer (Griffiths & Knezevic, 2010). To put it simply, scholars in

world-systems theory see the capitalist world-economy as pushing educational

policies onto peripheral States. Apple, for instance, writes, "education cannot be

understood without recognizing that nearly all educational policies and practices

are strongly influenced by an increasingly integrated international economy" (2010,

p. 1). Apple later directly references the world condition of core and peripheral

countries, while at the same time addressing educational policy transfer. He argues,

"Policies are 'borrowed' and 'travel' across borders in such a way that these

neoliberal, neoconservative, and managerial impulses are extended throughout the

world, and alternative or oppositional forms and practices are marginalized or

attacked" (2010, p. 2).

Indeed, one of the main points of argumentation that world-systems

theorists in education employ is critiquing neoliberalism. Briefly, neoliberalism is a

particular *kind* of capitalism that believes in low levels of taxation, government fiscal

austerity, the liberalization of trade, privatization, and deregulation (see Harvey,

2005). Many education scholars have noted that international development

organizations – particularly the Bretton Woods Institutions (The World Bank and

International Monetary Fund) – and core policy-exporting countries such as the

United States and the United Kingdom have promoted this neoliberal ideology since

the late 1970s (i.e. Apple, 2010; Carnoy, 1995; Dale, 1999; Klees, 2008; Mundy,

1998; Rizvi & Lingard, 2010; Stromquist, 2002; Vavrus, 2005). Samoff, in writing

about educational policy 'reforms' in Africa, argues,

> Both borrowing and imposition have occurred. In the modern era, with few
> exceptions, the direction of influence is from European core to southern
> periphery. Institutional arrangements, disciplinary definitions and
> hierarchies, legitimizing publications, and instructional authority reside in

that core, which periodically incorporates students and professors from the periphery, of whom many never return home. (2007, p. 49)

In terms of education and neoliberal ideology, educational reform in Western countries has increased measurability and accountability in the institution while also pushing for increased privatization of educational services in the form of vouchers and charter schools, a trend that one finds across many parts of the world today (Berman, Marginson, Preston & Arnove, 2007).

The borrowing, lending, and learning of educational policies can be seen through the lens of core-periphery relationships. World-systems theory still recognizes that nation-states have sovereignty and are empowered to make independent decisions (Wallerstein, 2004); however, as Clayton writes, "periphery educators, like subordinate actors in other settings, are cognizant of hegemony to a greater or lesser degree and that their responses, like those of other subordinate actors, are informed by their aspirations and constraints in relation to emancipation, self-interest, and survival" (1998, p. 495). This is similar to Wallerstein's (1983) consideration that states face enormous costs for not conforming to the world-economy.

Criticism of world-systems theory can be found in scholarship that employs world culture theory and that which does not but that addresses cases of resistance to policy imposition to a greater extent than that recognized in much of the world-systems literature. Ramirez (2003), arguing against world-systems theory from a world culture perspective, writes, "Schools and universities are at least as likely to produce agitated citizens as tranquilized masses ... It is difficult to explain the sweeping changes in discourse, as well as structure and activity, as mostly reflecting

power differences between actors" (pp. 250-251). From a different perspective, scholars have noted that resistance to dominant core ideologies is common and can be found in many localities, not only in those in peripheral states. Anderson-Levitt's (2003) edited volume is full of such examples where local actors form an active resistance to imposed policy, even when such policies did not appear to be imposed from abroad as in the U.S. (i.e. Rosen, 2003). Even in the work of some world-systems scholars one finds cases of local active resistance to globalized educational policies. For example, in Apple's (2010) edited volume, Sandler and Mein (2010) write both of imposed neoliberal policies in Mexico as well as programs that resist them. Wallerstein (2005) himself admits that world-systems theory needs to be reevaluated in the 21st century. He writes, "The modern world-system in which we are living, which is that of a capitalist world-economy, is currently in ... a crisis, and has been for a while now" (p. 77). He argues that the shift to another system or multiple overlapping systems will be turbulent and chaotic.

In sum, world-systems theory is primarily an economic lens through which to view the way the world works with its roots firmly grounded in Marxist theory of imperialism. This has been the strength of its lasting influence but also its opening for criticism. Most scholars would not take up an argument that we live in anything other than a global capitalist world, but many question whether culture and policy is necessarily as bounded by economics or the borders of the nation-state as world-systems theory suggests. This position will be taken up by the global constructivist scholars in the next section.

The scholars whom I have identified in this final section on global constructivism form a loose confederation that represents a diverse spectrum of disciplines, geographical locations, and scholarly foci. What they have in common is their questioning of grand meta-narratives surrounding 'progress,' their respect for the autonomy and sometimes the irrationality of political actors, their focus on local meanings and understandings, and their embrace of the world as fairly chaotic and haphazard. Perry and Tor (2008) also recognize that there is a 'third way' group of scholars in comparative education, and they label them "phenomenological/culturalist" (p. 515). They place educational policy scholars such as David Phillips, Jürgen Schriewer, and Gita-Steiner-Khamsi in this group because of the aforementioned qualities that these scholar embrace. Building upon Perry and Tor's typology, I also include anthropologists such as Arjun Appadurai, Kathryn Anderson-Levitt, and Bradley Levinson in this third-way group as well as comparative education scholars Stephen Carney, Frances Vavrus, and Lesley Bartlett whose work can inform the study of policy transfer. Expanding Perry and Tor's (2008) original label allows the focus of this group to focus not only on policy analysis but also on the cultural and contextual aspects of why and how policy gets transferred.

The label, global constructivism, is an attempt to describe the viewpoint shared by these scholars regarding policy transfer. First, the 'global' in the moniker represents a prevailing post-national viewpoint in which the nation-state is not seen as the sole 'border' demarcating a country's cultural, economic, or political order.

Rather, these scholars contend that transnational spaces also exist and are extended by diasporas of people, ideas, institutions, and corporations. Second, 'constructivism' suggests that these scholars believe meanings are constructed by humans as they engage in the world; humans engage with the world and make meanings based on historical and social circumstances; and, that meaning is always social and temporal.

One prominent scholar who holds this view is Appadurai, who sees the world in transnational terms, declaring that nation-states are fazing out of importance as a unit of political analysis. He argues, "Nation-states, as units in a complex interactive system, are not very likely to be the long-term arbiters of the relationship between globality and modernity" (1996, p. 19). Instead, Appadurai proposes that cultural imaginations and diasporas form *imagined worlds* or, "multiple worlds that are constituted by the historically situated imaginations of persons and groups spread around the globe" (p. 33). The framework that Appadurai uses to explore these imagined worlds is that of *global cultural flows*. These flows he labels 'scapes' and identifies five of them: ethnoscapes, mediascapes, technoscapes, financescapes, and ideoscapes.

Appadurai puts the agency on individual actors or groups to navigate and form these landscapes. For example, Appadurai (1996) states that "...ideoscapes are composed of elements of the Enlightenment worldview, which consists of a chain of ideas, terms, and images, including *freedom, welfare, rights, sovereignty, representation,* and the master term *democracy*" (p. 36). However, these terms may flow throughout the world and form diasporas of different meanings or they may be

rejected entirely. For example, the democracy movement of the 'Arab Spring' in

Tunisia, Egypt, Libya, and throughout the Middle East carries different lexical and

structural meanings than what Americans comes to think of as 'democracy'. As the

US discovered painfully in Iraq, transplanting one ideology or abstract idea into

another context is difficult to do. Meanings change even though the words may stay

the same. These keywords and ideas travel freely around the globe finding

"pragmatic configurations of rough translations" (Appadurai, 1996, p. 37).

The work of Appadurai, and others who share his viewpoint, is a refutation of

the theoretical underpinnings of macro-sociology, such as world culture and world-

systems theory. In a direct challenge to world-systems theory, Appadurai argues,

"The new global cultural economy has to be seen as a complex, overlapping,

disjunctive order that cannot any longer be understood in terms of existing center-

periphery models" (1996, p. 32). In equal measure, Appadurai also challenges world

culture theory: "... people, machinery, money, images, and ideas now follow

increasingly nonisomorphic paths" (p. 37). Appadurai argues that people construct

localities for themselves, imagine themselves in multiple diasporas, and construct

meaning in context specific ways. This is to say that people do not necessary follow

the 'scripts' as suggested by world culture theory but rather navigate their lives

pragmatically and complexly.

The link between Appadurai's view of postnational flows and educational

policy transfer can be found in Carney's notion of *policyscape* (2009). Noting his

inspiration from Appadurai, Carney defines policyscape as an "educational

ideoscape ... that might capture some essential elements of globalization as a

phenomenon (object and process) and provide a tool with which to explore the spread of policy ideas and pedagogical practices across different national school systems" (2009, p. 68). In studying how educational policies are transferred to Denmark, Nepal, and China, Carney observes that all three disparate countries enacted ideological similar educational policies around a 'global knowledge economy.' However, Carney is not a world culture theorist. He finds that Denmark, Nepal, and China borrow and learn transnational educational policies for different goals and motivations and heavily localize them to meet their own needs; especially by actors such as teachers, parents and students. Carney's argument based on this research is that a similar policy may be borrowed, but different results are found in each country.

Why countries like Denmark, Nepal, and China select similar educational policies is a question that is best posed to those in the 'Oxford School' of educational policy studies from which a number of scholars who could be categorized as global constructivists have come. Rappleye and Paulson (2007) argue that this group of scholars focuses on the spectrum of educational transfer, stages of policy borrowing, 'filters' in the policy borrowing process, and context of policy attraction (p. 257). On the matter of a spectrum of policy transfer, Phillips and Ochs (2004) propose that one end of the spectrum is "imposed transfer," and, moving left to right, the other categories are "required under constraint," "negotiated under constraint," "borrowed purposefully," and "introduced through influence." While policy transfer may be observed by world-systems theory or world culture theory, not all cases of educational policy transfer can be explained by these existing theories. Phillips and

Ochs' spectrum accounts for this by introducing different levels of transfer. 'Imposed transfer' implies a coercion has taken place – in the language of world-systems theory – from core to periphery, while 'negotiated under constraint' may not necessarily be considered so dependent. 'Borrowed purposefully' could be explained by world culture theory, but both this and 'introduced through influence' could also mean that a state has borrowed a policy not as a means to mimic others but for internal political reasons.

Phillips (2004) proposes four stages in which an external policy enters a nation. First, a state has an impulse to change current policies due to various circumstances and looks to external policies that could easily be internalized. Second, decisions are made as to the 'right policies' to implement. During this stage, Phillips suggests that states may make decisions based on practical considerations or may also promise sweeping educational policy changes without the means to implement them. In the third stage, policies are implemented, and significant actors such as administration, principals, and teachers will either resist or facilitate new initiatives. During the fourth stage, external policies are internalized, representing a synthesis of both the old and new policies that have been tuned to local needs. Steiner-Khamsi (2000) calls this stage 'indigenization,' and Anderson-Levitt (2003) labels this 'creolization.'

One of the main points in the policy analysis work of Phillips and Ochs (2004) is that in every spectrum, at every stage, and through every filter, people are involved in political and practical decision-making. As policy comes to be implemented, Phillips and Ochs (2004) argue that it passes through a series of

filters and becomes transformed. These filters range from "actors and organizations," to "agencies, media and publications," to "individuals and institution", and finally "contexts and practitioners." Actors can include both those that push for a particular educational reform and those that resist such a reform. Both have a dynamic role to place in the selection of policy and its implementation (Rappleye, 2006). A diagram of this process is located in Appendix E and will again be reference in the next chapter as I analyze the origins, interpretations, and implementation of Bhutan's new inclusive education policy.

Global constructivist scholars, like those in the Oxford School, recognize the importance of individuals with agency when policies are transferred. This is a good place to start discussing the policy work of Steiner-Khamsi and Schriewer. Steiner-Khamsi and Stolpe (2006) write:

> Reforms do not have a home base, a territory, or a nationality, and therefore do not 'belong' to a particular educational system. Individuals conceive reforms and, depending on where they are geographically and institutionally situated and how well they are globally networked, succeed in having their idea disseminated worldwide. (p. 185)

Thus, Steiner-Khamsi and Stolpe argue that policies flow untethered throughout the world, and actors create, alter, disseminate, borrow, and learn these policies in specific contexts. Schriewer argues that one such motivation for borrowing and learning policies by states is *externalization*, in which actors adopt external policies in order to legitimate reform (1990). This relates to Steiner-Khamsi's work in that it observes policy transfer enacted by political actors for solutions to local policy problems that can ultimately lend itself to systems and/or cultural change.

Cultural change, therefore, cannot exist without *people* re-creating, re-interpreting, and re-imagining it. It is the *individual* unit of analysis that is most important in exploring the *how* and *why* of the transfer of educational ideas and constructions. This argument is in reference to my earlier discussion in Chapter Three on the importance of the individual as a unit of analysis in understanding policy transfer (Steiner-Khamsi & Stolpe, 2006). Ong (1999) argues that anthropologists of globalization should pay more attention to "the agents who are part of these movements and who must manage the cross-currents of cultural winds at home, in transit, and upon arrival" (p. 93). Similarly, Hannerz (2002) argues this point by stating:

> As people move with their meanings, and as meanings find ways of traveling even when people stay put, territories cannot really contain cultures. And even as one accepts that culture is socially acquired and organized, the assumption that it is homogeneously distributed within collectivities becomes problematic, when we see how their members' experiences and biographies differ. (p. 8)

It is important to note the last idea in Hannerz's argument: that "members' experiences and biographies differ." While policies and social constructions – like 'disability' – transfer and move globally, displacing and subverting context, it is *people* that travel with them. The exchange of ideas is accomplished either by people physically moving to and fro, or by importing or exporting via electronic media, and it is their personal characteristics – background, history, personal relationships, relative position of power and influence, likeability, etc. – that matter. It is the efficacy of those that travel with schema and constructions in their heads, or in their laptops, that determine *if* and *how* these exogenous ideas will shape the local context. Sprigade (2004) makes the argument that it is the relationship between

individual actors in a network that ultimately determines the results of educational policy transfer.

In the case of Bhutan, individuals that bring new ideas about disability come from both outside and inside the country's borders. Bhutanese travel to other countries in a slow but steady trickle, absorbing ideas from places like India, Australia, Canada, the United States, Europe, and so on. Conversely, foreign 'experts' travel to Bhutan for conferences, workshops, and teaching exchanges, carrying their imagination as to what Bhutan 'is' and how it 'should be.' To this point, Bhutan is reflexively creating itself in two ways. First, there is a growing sense of "other worlding" (Katz, 2004, p. 202), meaning that many Bhutanese individual actors place themselves in a 'developing world' status that situates Bhutan outside of modern wealth and knowledge. The development discourse in Bhutan makes a clear distinction between 'tradition' and 'modernity,' and emphasizes progress towards the latter (see also Pigg, 1996 for a similar case in Nepal). Second, many Bhutanese – especially tour operators – are reimagining themselves through the eyes of Westerners that want Bhutan to be a land of peace, happiness, Buddhism, and mystical orientalism, pure and unadulterated by the 'corruption' of Western globalization. In Bhutan, for example, the back of the declarations card that a visitor receives at the airport boldly claims, "Bhutan: Where Happiness is a Place." This plays into the Western notion of Bhutan as a *Shangri-La,* a "Land of Happiness," where 'happiness' has been mistranslated as temporal personal well-being away from its original meaning in Buddhism as 'harmony' and 'contentment'. Occasionally throughout my school year at RTC, my students would check-in with

me and ask, "How are your finding Bhutan, Sir?" To which they would they would

almost immediately answer their own question, "Very beautiful, right Sir? Peaceful,

mo?"[3] This is similar to the experience of Sherpa in Nepal, whom Ortner (2001)

argued were re-imagining themselves through the stereotypes of Western climbers.

Ortner also uses the Sherpa case to illustrate that it is the individual actor that must

negotiate themselves within a certain structural imagination and framework.

There is also growing eagerness among some government officials and civil

society organizations to adopt international 'best practices' and in replicating these

results. This exemplifies how many Bhutanese situate themselves outside of the

'real' knowledge about disability. The majority of people I interviewed involved in

disability service delivery in Bhutan expressed a desire to know the 'definitive' best

practices, situated themselves in such a way as to believe that answers lay *outside* of

Bhutan, and wanted help from exogenous sources in their implementation of these

'best practices'. This will become clearer in the next chapter.

The desire of many policy actors for 'best practices' through policy transfer

can lead to grand discursive changes in policy, but often has a weaker effect on

practice. To this point, the most crucial aspect of Steiner-Khamsi and Stolpe's (2006)

work is their rejection of world culture theory and her call for a reevaluation of

world-systems theory. They write, "There is always and everywhere a huge gap

between policy talk and policy action" (2006, p. 185). They also argue that

observing convergence – in the manner found in world culture theory – is

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[3] In Dzongkha, adding "mo" at the end of any phrase turns that phrase into a question. This is a prime example of 'Dzonglish' because "mo" is often put at the end of English sentences as well. Another common Dzonglish example is using the word "la" – which is generally placed at the end of phrases when speaking to someone of high social status – as in, "Thank you for speaking to us, la."

superficial. Once a policy is carefully analyzed at the level of its implementation,

they contend that what was once "loosely coupled" becomes a gaping chasm

between the origination of a policy and its destination. Put more elegantly, Steiner-

Khamsi (2010) writes:

> What comes across as isomorphy is often merely 'global speak,' instrumentally involved at a particular time and in a particular policy context, to accelerate policy change. What neo-institutionalist theory considers 'loose coupling' should be interpreted as a resistance of government officials, administrators, and teachers – especially in developing countries – to implement or sustain imported reforms. (p. 332)

While Steiner-Khamsi and Stolpe (2006) use some world-systems analysis to

describe Mongolia – observing that Mongolia populates two different world-systems

of economic dependence and the post-socialist polity – this does not inform the

entirety of their study. In fact, while Steiner-Khamsi and Stolpe find the same kinds

of core-dependent aid relationships that form the heart of world-systems theory,

they also observe that Mongolia engages in 'global policy speak' in order to satisfy

core international donors while using educational policies like outcomes-based

education (OBE) either very little or heavily altering its intent to fit with local

conceptualizations of Mongolian schooling. This is very similar to Silova's (2005)

findings that Central Asian countries 'hijack' traveling educational policies to meet

their own needs but do not actually implement them to the fullest extent to make

them successful. Steiner-Khamsi's (2010) rejection of the nation-state as a unit of

analysis ultimately puts her at odds with scholars who employ world-systems

theory in comparative education. She argues, "The greatest challenge is to avoid

falling into the trap of first establishing national boundaries, only to demonstrate

afterward that these boundaries have indeed been transcended" (2010, p. 327).

Both world culture theory and world-systems theorists may claim that aid donor-recipient relationships support their respective views on world polity. However, this relationship – especially in the bilateral sense of direct country to country contact – can best be understood from the global constructivist perspective of flows and scapes. Steiner-Khamsi and Stolpe (2006) point out that Mongolia receives direct loan and aid money from many countries such as the US, Japan, the UK, Korea, and Denmark. All of these countries are in a bilateral relationship with Mongolia, and yet all have difference political agendas tied to the aid money that affects what projects they support. Some time ago, Holmes (1981) observed that country-specific preferences determine policy export. If a country like Mongolia hopes to receive development funding from a plethora of countries through bilateral aid relationships, it must make sure that it speaks just the right 'policy talk' in order to appease the different political agendas of donor countries.

While world cultural theory and world-systems theory may not be able to entirely account for bilateral aid relationships, the collaboration of countries in the global South among *themselves* may also be problematic for world culture and world-systems theorists. Steiner-Khamsi and Chisholm (2009) have written extensively on educational policy borrowing and lending between 'developing' countries, or what is called *south-south cooperation*. Another proposed name for this process is *technical cooperation between developing countries* (Rappleye, 2008). Both Rappleye (2008) and Steiner-Khamsi and Chisholm (2009) see south-south borrowing and lending as an alternative – and a breakdown – of the world-systems

theory as the flow of ideas and policies do not follow the path from core to periphery.

Theories of policy transfer from world culture and world-systems scholars may not fair well when moved from general to specific contexts. This point is emphasized by global constructivist scholars and becomes my main argument when exploring the 'global policy speak' of inclusive education in Bhutan. In the concluding section of this chapter, I explore how an anthropological perspective – incorporated with the policy analysis tenets of the global constructivists – can best inform this unique study on inclusive education policy in Bhutan.

An Anthropology of Policy in Bhutan

In a hypothetical explanation of world culture theory, Meyer, Boli, Thomas and Ramirez (1997) speculate that an island completely isolated from the world until today would, upon discovery, immediately legitimize itself by forming itself as a nation-state, by creating institutions, and by involving itself in international affairs such as ratifying human rights treaties. One could imagine that world-systems theorists would strongly disagree with the premise of the independent action of this newly-founded state and would likely argue that such decisions illustrate policy imposition as imperialism, in a neo-colonial sense, is still present in global political-economic relations.

This is an interesting example to take up with Bhutan in mind because there are some parallels to this isolated island. However, Bhutan was never completely isolated and its current development and modernization projects appear to seek

sustainability and cultural preservation, as much as to 'modernize'. While Bhutan

did indeed create institutions and involve itself in the UN much as world culture

theorists would anticipate, Bhutan's policymaking in education cannot be

characterized solely by isomorphism because of Bhutan's commitment to unique

cultural practices that, at least rhetorically, inform all of its policies. Similarly,

world-systems theory falls short in explaining Bhutan thus far because most of the

economic activity in Bhutan is domestic, with its foreign trade limited primarily to

India (Karma Galay, 2004). To date, Bhutan has not become enmeshed fully in the

capitalist world-economy in the sense that they are beholden to core countries like

the U.S or to institutions like the World Bank or International Monetary Fund. Of

course, Bhutan is a relatively recent addition to the world-system in the sense

understood by Wallerstein and others, and it may very well be relegated to

peripheral state status in the years ahead. However, this scenario seems unlikely at

the moment given Bhutan's earnest attention towards sustainable development,

Gross National Happiness, cultural preservation, and general empowerment in

making its own decisions in development and international affairs. Bhutan has the

fortune, and insight, to learn from the mistakes of past development projects in

other countries while not (yet) engaging in global economic affairs.

For these reasons, Bhutan is an excellent site for an anthropologically-

informed study of its inclusive education policy. While a world culture theorist may

observe that Bhutan acknowledges its education system is now becoming more

'Western' and 'modern,' it is unlikely that its schools and classrooms will look just

like those in other countries. Anderson-Levitt (2003) argues, "A complete theory of

schooling and of school reform would begin by acknowledging that there is a

common set of models of modern school ... At the same time, ... administrators,

teachers, and students create within the roughly common structure very different

lived experiences" (p. 18). It is those 'very different lived experiences' in the case of

inclusive education that I hope to capture through an ethnographic analysis of

policy.

Kozleski, Artiles and Waitoller (2011) argue that "national leaders and local

actors appropriate inclusive education in the midst of complex historical and

cultural contingencies" (p. 8). By this they mean that an analysis from the top

downward fails to capture the local historical and cultural conditions that lead local

actors to borrow inclusive education policy from abroad. They believe that there is a

gap in the inclusive education literature in this regard:

> [I]nclusive education [research] projects have failed to address deeply
> embedded assumptions that guard how schooling is constructed: (1) the
> complex process of identity formation and development, (2) the dynamic and
> cultural nature of practice within local schools, and (3) the institutional
> pressure to conform, sort, and organize along bureaucratic lines. (Artiles,
> Kozleski, Waitoller & Lukinbeal, 2011, p. 51)

Sutton and Levinson (2001) advocate for this kind of sociocultural analysis to

understanding educational policy in general, and I seek to apply it to inclusive

education policy in Bhutan. Sutton and Levinson (2001) suggest that public policies

are situated in cultural and historical contexts, and only realized through local

cultural practice and in "how people appropriate its meanings" (p. 3). This idea is

adapted from Shore and Wright's edited volume, *Anthropology of Policy*, in which

they write, "The study of policy ... leads straight into issues at the heart of

anthropology: norms and institutions; ideology and consciousness; knowledge and

power; rhetoric and discourse; meaning and interpretations; the global and the local" (1997, p. 4). Taking this prompt, Sutton and Levinson (2001) argue that "sociocultural policy analysis should link the discursive practice of normative control in any local-level community or institution with the discursive practices comprising larger-scale structure of law and governance" (p. 2). They propose that anthropologists should reinvigorate 'implementation studies' to explore how policy contributes to the construction of culture.

The intention of my research in this dissertation was to investigate inclusive education as an imported yet locally-appropriated policy consistent with a global constructivist viewpoint. However, I do not wish to abandon completely the world culture theorists' focus on macro-sociological narratives of human rights and modernity exemplified in global educational policy or the world-systems theorists' attention to global relations of power as exemplified in the policies that get borrowed and those that do not.

Conclusion

This chapter has sought to explain theoretical conceptualizations of educational policy transfer from the world culture, world-systems, and global constructivst viewpoints. Each viewpoint has attempted to describe how and why educational policies imagined in one place travel to another. World culture theorists view this transfer as a process of convergence, a global search for universal best practices in education. World-systems theorists view this transfer as a process of imposition, with powerful capitalistic actors coercing policies into peripheral states. Scholars in

the global constuctivist viewpoint–while themselves not unified behind a particular theory or 'school'–conclude that policy transfer be studied on a case-by-case basis because of the unique historical-cultural context of each case, the importance of recognizing agency in individual policy actors, and the recognition that states engage in 'global policy speak' for their own political purposes.

The next two chapters will present the data gathered from a year of fieldwork in Bhutan and analyzed from a global constructivist perspective. Chapter Four will focus on the macro and meso- levels of policy and international idea exchange in and through Bhutan by exploring *how* educational policy was transferred, *why* it occurred, and *what* impact this has had on the shaping of local meanings of disability. The process of this transfer, as I will argue in the next chapter, is almost entirely predicated by individual actors (i.e. Steiner-Khamsi & Stolpe, 2006). Chapter Five will focus on the micro-level experience of schools and classrooms and in how existing structures serve to 'disable' children in various ways and means. In this chapter, the anthropology of policy concept is realized and local experience of policy as practice– informed by history and context – serves as a challenge to macro-logical theory (i.e. Anderson-Levitt, 2003).

CHAPTER FOUR: The Construction of Disability Through Policy Transfer

Introduction

Situated on the banks of the Wang *Chhu* [river] in Thimphu, the track at

Yangchenphug High School (YHS) might just be one of the flattest places in Bhutan.

The bright blue of the track turf certainly stands out from those other ubiquitous

horizontal surfaces scattered about the valleys: the dusty, brown football pitches. It

is early morning – around 8 am – and adults and students begin to stream down to

the track field. The sun shines brightly in the cool autumn air with an intensity that

comes from being over 7,500 feet closer to the sun than one is at sea level. White

tents are being set up, adorned with Buddhist symbols, and intricately carved

furniture is being placed inside the tents, befitting for the special guests that are

arriving. Emerald pine boughs are strewn across the ground and looks like a

coniferous carpet, which is also standard practice for receiving esteemed guests in

Bhutan. The adults are wearing their 'nice' *gho* [male garment] and *kira* [female

garment], accompanied by the formal *kabnye* [long white scarf] for the men and

rachu [ornate sash] for the women. *Gho* are notoriously hard to put on, and I need

assistance from several of my Bhutanese friends to get the folds and length just

right. The students are dressed decidedly casually in t-shirts and shorts or track

pants. The juxtaposition between students and guests is interesting to witness, but

not out of the ordinary in 21st century Bhutan. However, the students are *supposed*

to be dressed this way. The students who are gathering are all youth with

disabilities, and they are arriving at the YHS track in Thimphu to run, jump, and celebrate their possibilities.

On the first week of December 2012 – when the above scene took place – there were several events pertaining to disability that coincided in Bhutan. On the 3rd of December, there was a celebration of the International Day of Persons with Disabilities – an annual global event put on by the United Nations (United Nations [UN] Enable, 2012) – that involved a Special Olympics track meet, songs, dances, food, and was graced by the presence of several important Bhutanese dignitaries, including Her Majesty The *Druk Gyaltsuen* [Dragon Queen], Jetsun Pema. That evening, a forum on disability in Bhutan was held at a public auditorium in Thimphu that featured presentations and testimonials by UNICEF representatives, professionals, teachers, and parents. Later that week, a three-day conference was held in that same auditorium, called "Workshop on Management of Speech and Developmental Disorders in Children," and it was hosted by visiting doctors and therapists from the United States.

Almost exactly one year later, another important event happened that also served to potentially shape disability and education discourse in Bhutan. From December 3rd until December 5th, 2013, I attended the Regional Seminar on Inclusive Education with Focus on Children with Disabilities – hosted by UNICEF, AusAid, and the Paro College of Education – brought together inclusive education professionals and advocates from South and Southeastern Asia to the auditorium at Paro College. There were many presentations on the experience of disability in Bhutan and elsewhere in Asia, while at the same time many Western 'experts'

presented a vision of inclusive education that is very paradigmatically informed by their own experiences in England, the United States, and Australia. When comparing this seminar with the neurodevelopment workshop held in December 2012, two very different constructions of disability are presented.

The focus on this chapter is the way disability is being reconstructed in the country through the importation of two specific models of 'disability'. The first is the medical model approach to what it means to be 'normal' and 'abnormal' in society, focusing on the individual impairment rather than the society that impairs the individual. The second construction of 'disability' draws upon the rights model, which constructs 'disability' much differently as something that is 'made' by societal barriers, thus marginalizing the individual, and offers up an opportunity to ultimately empower the marginalized group through the realization of inherent rights. These two paradigms are quite divergent ways of constructing 'disability' and, I argue, often clash. This will be explored much more in-depth as the chapter progresses. Needless to say, the transfer of these *exogenous* ideas into Bhutan is problematic in constructing disability.

By using the word 'exogenous,' I am not purporting that Bhutan's borders are somehow bounded and fixed to prevent the flow of information, nor that every single idea that enters Bhutan is somehow 'foreign' or 'alien.' Rather, the use of the term *exogenous* is deliberately used to highlight the point that the ideas being brought to Bhutan through a variety of means – which I will explore further in this chapter – have developed elsewhere by individual actors operating within their own cultural schema. Rather than think about the word by its pathological definition –

meaning a foreign body entering a local system – I prefer to think of *exogenous*

botanically, as an outside growth grafted onto an already established frame. Giddens

(1990) argues that, through the "dislocation of space from place" (p. 19), the

phenomenon of global idea exchange could be seen as a 'disembedding' of "social

relations from local contexts of interaction" (p. 21) and the 'reembedding' of these

relations in other "local conditions of time and place" (p. 80). In other words, there

is not a sharp divide of *exogenous* and *endogenous* ideas and constructions but

rather a dialectic between the two (e.g. Arnove, 2007). In Bhutan, or anywhere else

for that matter, there is always cultural flow and change, but there still exists

cultural reference points that act as the 'local.' Returning to the botanical metaphor,

the exogenous growth on a tree may alter the external appearance, and exogenous

layers of bark continue to form on top of each other, but inside the tree is the same

fibrous material as before. This inside material may lose some of its original

composition over time, but elements of its character remain. As Ortner argues,

"social transformation works in part through the constant production, contestation,

and transformation of public culture, of media and other representations of all

kinds, embodying and seeking to shape old and new thoughts, feelings, and

ideologies" (2006, "Updating Practice Theory"). Ortner's point makes clear that

social transformation and cultural change is possible – the outside *and* the inside of

the tree can metamorphose – but, in the case of my research, through a dialectical

process that is channeled through the actions of individual actors in society.

This chapter, then, illustrates the importance of the individual in the study of policy transfer. Following from Chapter Three, the following aspects of a globalized constructivist perspective were particularly useful in understanding the data discussed in this chapter, which comes primarily from the analysis of ABC policies and interviews with XYZ policy actors:

- Policyscapes flow globally but are appropriated and interpreted by actors (Appadurai, 1996; Carney, 2009)

- Motivations for the adoption, interpretation, and implementation of policy vary (Anderson-Levitt, 2003; Phillips & Ochs, 2004; Schriewer, 1990; Steiner-Khamsi & Stolpe, 2006)

- Policy is always transferred into existing contexts with their own histories (Kozleski, Artiles & Waitoller, 2011; Sutton & Levinson, 2001)

In the next section of this chapter, I will explore the importance of the South Asian region – historically and contextually – in understanding the early development of education in Bhutan as influenced by outside factors. Following this section, I will explore the contemporary processes of how educational policies and ideas are transferred and interpreted. Specifically, I analyze the discourse and development of Bhutan's draft National Policy of Special Educational Needs (MoE, 2012c) using the framework of Phillips and Ochs (2004) described in the previous chapter because of the ability of this framework to recognize the complexity of the policy transfer process. Next, I will segue the analysis of Bhutanese educational development into a deeper examination of the international discourse pertaining to disability and education. I argue that two different discourses have entered Bhutan

at the same time – that of the medical model and that of the rights model. I conclude

this chapter by exploring the limitations of macro-sociological theory in

understanding the global flow of ideas, constructions, and policies.

Historical Developments in Bhutanese Education: Learning from British India

> The twenty-year reign of King Jigmi Dorji Wangchuck [Third *Druk Gyalpo* of Bhutan, 1952-1972] saw the creation of a modern Bhutanese state. His reign coincided with decolonization period in Asia and Africa and the creation of independent nation states. The first generations of leaders in countries of these continents had for their model, the nineteenth century European nation-state. Although Bhutan was never colonized, the trend toward building such a state was conspicuous. Particularly because King Jimi Dorji Wangchuck – unlike his father and grandfather – had modern education both in Kalimpong and London, and thus, a different dimension of exposure. (Sonam Kinga, 2009, p. 217)

This excerpt from Dasho Sonam Kinga's history and analysis of the Bhutanese State

– *Polity, Kingship, and Democracy* – highlights the two central points in this section.

First, it was the reforms and development schemes of the Third and Fourth *Druk*

Gyalpo [Dragon Kings] that were the main driver of social transformation and

'modernization' in Bhutan.[4] Until the 1950s, Bhutan can essentially be considered a

medieval state and economy (Karma Ura, 2004; Sonam Kinga, 2009), and it was the

initial push by the Third *Druk Gyalpo,* in the first Five-Year Plan in 1961, that set

Bhutan on a path towards 'modernity.' However, the epigraph also suggests that the

Third *Druk Gyalpo* was influenced both by the political changes of the region and

through his own experiences of education in India and England, the second major

point I seek to make. It was the personal experiences of these major social reformers

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[4] It should be noted that the first *Druk Gyalpo,* Ugyen Wangchuck, is important to this process by stabilizing Bhutan after centuries of near-constant political power struggle. The second *Druk Gyalpo*, Jigme Wangchuck, should also be recognized for his reforms in taxation and governmental structure that turned Bhutan away from the feudal system (Karma Phuntsho, 2013).

in Bhutan – the Third and Fourth *Druk Gyalpo* – and their exposure to exogenous ideas that helped shape internal policy decisions and social concepts.

The story of social change and transformation in Bhutan is allegorically described by Dasho Karma Ura (2004) as a game of archery, which is also the national sport of Bhutan. He suggests that the first cause of development and change in Bhutan is strong and visionary leadership, which corresponds to the *da-pon* [Lord of Archery]. Second, he explains that another cause of development in Bhutan is efficient institutional organization, which corresponds to the camaraderie of the archery team. Third, he suggests that the rich natural resources of Bhutan – when managed appropriately – helped the rapid development process much like possessing the best materials for the bow and arrows. Lastly, Dasho Karma Ura (2004) argues that the long-term support of international donors has supported Bhutan's rapid development, which corresponds to the energy stored in the bow. He adds, "Air resistance is analogous to uncontrollable and unforeseen adverse factors affecting development plans" (p. 283). While I will discuss the presence of international donors in Bhutan with more detail in a later section, it is worth noting this archery-development allegory here because it highlights the vaunted position of both the *Druk Gyalpo* and the Royal Government in public opinion and in policy implementation because they are the Lords of Archery.[5]

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[5] Even with the transition to democracy in 2008, the approval rating for the Bhutanese monarchy is still incredibly high. The Fifth *Druk Gyalpo,* Jigme Khesar Namgyel Wangchuck, has a strong following in Thailand, Japan, and, of course, within Bhutan itself (Denyer, 2008, 5 Nov). He is known as the "People's King," lives humbly, and regularly gives out *kidu* [roughly translated as Royal 'welfare,' but not necessarily analogous to 'charity'] and visits with the Bhutanese people constantly. His image, alongside his Queen, the *Druk Gyaltsuen*, is *everywhere* in Bhutan – from every wall of every business to the broaches and pins of the Bhutanese in *gho* and *kira*. I had the great fortune to meet him while I was in Bhutan, along with two separate meetings with the *Druk Gyaltsuen*, and I can personally attest to their genuineness and charm.

The leadership of the Royal Family in guiding Bhutan through a massive

societal upheaval from medieval political and economic structures to a 'modern'

democratic nation-state and market economy within the span of two generations

had profound societal and cultural implications. During this early period of

modernization and development, Karma Phuntsho argues that there were two

processes at play: "the active pursuit of economic development and the passive

reception of external influence through exposure and globalization" (2013, "Early

Modern Period"). Specific to this dissertation, education has been one of the most

important changes in Bhutanese society from the 1960s to the present, and a

significant example of the interplay of 'active development' and 'passive reception'

in that the education system has been directly and indirectly influenced by

individuals and the ideas of which they carry. In the first chapter, the history and

development of the Bhutanese education system was discussed in detail, so I will

not repeat myself in this chapter. However, in this section I make note of how

exogenous influences have shaped Bhutanese education historically and in the

present.

In the historical development of education in Bhutan, it is important to

recognize that the Bhutanese themselves specifically requested the majority of the

exogenous ideas that were brought into the country. During the reign of the first

Druk Gyalpo, a nascent modern education "system" was established in the form of

two schools in Bumthang and Haa in the 1910s. These schools were established

directly by the first *Druk Gyalpo*, Ugyen Dorji,[6] and Rev. W.S. Sunderland of the Church of Scotland Mission in Kalimpong (Karma Phuntsho, 2013). Sonam Tobgye (2011, 11 Nov) explains that, "the First King realized the importance of western education ever since his mediation during Colonel Younghusband's mission to Tibet in 1905" (p. 5). Sir Francis Younghusband led an English envoy into Tibet in 1905, which was viewed by many regional actors – especially China – as an 'invasion' of Tibet by the British (who had long desired to have a direct relationship between British India and Tibet). Ugyen Wangchuck traveled to Tibet to successfully broker peace between Younghusband and the Tibetans (Karma Phuntsho, 2013). Another Jesuit Priest, Father William Mackey, was instrumental in promoting a secular education system separate from the monastic education system.[7] Like Rev. Sunderland, Father Mackey was specifically asked by the *Druk Gyalpo* to come into Bhutan to establish his school in Tashigang, which would later become Bhutan's first college, Sherubtse (Solverson, 1996).

While the early development of education within Bhutan can be attributed to only a handful of individuals – specifically from the Jesuit community of northern India – there were also a score of Bhutanese aristocrats and courtiers' children that were receiving a modern education from the Jesuit schools in Kalimpong and Darjeeling (Dewan, 1991; Karma Phuntsho, 2013). Jesuit missionary schools in India were quite widespread by the early 20th century, having been brought to India in the 16th century by Francis Xavier. While the extent to which the Jesuit worldview

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[6] A businessman located in Kalimpong, India who also went on to be the first *Druk Gyalpo*'s Bhutanese envoy to India, Tibet, and Sikkim because of his fluency of Hindi, Tibetan, and English (Karma Phuntsho, 2013).

[7] Father Mackey was proud of the fact that he never converted a single Bhutanese to Christianity, which was probably something he was not allowed to do given Bhutan's ban on religious proselytization but still a curious statement coming from a Jesuit missionary (Solverson, 1996).

influenced the Bhutanese students' own worldview cannot be known, it is worth exploring the tenets of the Jesuit educational model. The historical Jesuit educational philosophy is one of embracing both the secular and the sacred. Through a humanistic core-curriculum, it employs the scriptures *and* the Western secular canon to teach moral character (*pietas*), promote the common good of society, foster social mobility, and provide students the intellectual freedom to be closer to God (O'Malley, 2008). For example, at a Jesuit convention in Bombay in 1892, a speaker delivered this message:

> Let the religious and secular be regarded as allies instead of opponents: let them be as the vessel of gold and vessel of brass, both sacred to the service of the sanctuary, and then the benefit of either is the benefit of both. Let the educational missionary recognize that the task assigned him by Christ is to transform by all the means the school affords the whole nature of the pupils committed to his care; and let the same lesson be impressed on all worked in the educational field, down to the humblest teacher in the primary school, and then in the day when the history of the Christianization of India comes to be written, it will be manifest beyond a doubt that in that great process missionary education has rendered splendid and invaluable service. (quoted in Huizinga, 1909, p. 104)

The above passage highlights the idea that there was a distinction between sacred and secular but that both reveal the 'truth.' However, the ultimate goal in Jesuit education during this period was the Christianization of India. As Seth (2007) contends, the goal of missionary education in India was not overt religious conversion, but rather to 'un-Hinduize' the population to prepare them to independently and rationally come to Christ.

As Bhutanese encountered the Jesuit educational system in Darjeeling and Kalimpong, they discovered a worldview and cultural schema very different from their own Vajrayāna Buddhist-informed conceptualizations. Given the absence of

historical documentation, it is hard to project exactly how these early students interacted and negotiated these worldviews. Certainly, the situation of knowledge and truth as obtainable in this lifetime is vastly different from the Buddhist belief that enlightenment is only possible through a multitude of karmic lifecycles. As Karma Phuntsho (2000) notes, a traditional monastic Buddhist education focuses on generating knowledge to benefit all sentient beings, while a modern secular education focuses on individual development that has immediate material benefits. In the Jesuit missionary educational model, pedagogy and curriculum are very subject-centered, meaning that, following the Platonic and Aristotelian traditions, each subject is treated as a specialized body of knowledge. This is markedly different from a traditional Buddhist education in that there is a strong interdisciplinary connection between various paths of understanding the world through poetry, medicine, astrology, and so on (Karma Phuntsho, 2000).

At this point in Bhutanese history – the early 20th century – the majority of Bhutanese neither attended boarding schools in India nor did they attend a *shedra* or *lobdra* [monastic schools] in Bhutan. While some were engaged in apprenticeships to learn the *Zorig Chhusum* [traditional thirteen arts], the vast majority of Bhutanese were agriculturalists that could neither read nor write. The few Bhutanese that did receive a secular modern education in the early days of Bhutanese modernization were generally those who were influential during that development process in that they were wealthy and had the means to educate themselves outside of Bhutan.

While we cannot draw a direct line between the Jesuit and colonial schools in northern India and the shaping of Bhutanese modern education, there are a great many similarities between the educational systems. Because of the lack of trained teachers in Darjeeling and elsewhere in India, the schools of the region embraced the 'Bell-Lancaster,' 'Madras,' or, as otherwise known, the 'Monitorial' system (Dewan, 1991), which was partially developed by British educators in India and – in an interesting case of reverse policy transfer – became wildly popular during the 19th century all over the world (Caruso, 2004). This system used one trained teacher – the Headmaster – and divided up a large number of students into different classes based on ability that were overseen by a cadre of 'Class Captains' or student monitors. The student monitors were given a wide swath of responsibilities and authority, and they were encouraged to dole out severe punishment to keep order. The system also maintained the appearance of meritocracy but downplayed independent or critical thinking in deference to a more preferred school environment of efficiency and discipline (Rayman, 1981). Observations of the classroom experience in contemporary Bhutanese schools will be explored in the next chapter, and it is there that it can be observed that some of these tenets of the Monitorial System are still deeply ingrained within the Bhutanese education system. The Monitorial System used few resources and was maintained by restricting the curriculum to a mechanized and easily reproduced methodology that even low-skilled student monitors could enact (Caruso, 2004).

British educational models of the 19th and early 20th century, in which Monitorialism was one facet, generally emphasized subject-centered curriculum

with little room for creativity and critical thinking. In the Monitorial System, it was important to keep curriculum and pedagogy uniform in order for student monitors to implement the lessons. The same uniformity can be found in traditional Bhutanese education. For example, in Buddhist art the quality of the work is measured in how well the artist replicated the original piece, not in how the artist showed individuality (Rennie, 2008). In traditional Bhutanese education – through apprenticeships or in the monastic system – deference was always paid to the 'Master-Teacher' and his authority was never questioned, leading to passive learning (Rennie, 2008). This was also a tenet of the British and Jesuit educational models in India at the time, and one can see why such models were easily transferred into Bhutan. The subject matter of the British and Jesuits, however, was problematic in that it represented a completely foreign worldview. The more recent introduction of critical thinking and student-centered pedagogy into Bhutan subverts both the established British model of education brought into Bhutan in the early 19th century, as well as much older traditional education practices.

The effect of this educational environment – created by harsh physical and psychological punishments, little emphasis on critical thinking, and most of the emphasis placed on memorization and mimicry – is still felt by students with disabilities in Bhutan. This educational environment was only exacerbated when the 1990s ushered in an era of 'Education for All' and mass school enrollment increases, but the basic structure of education remained transfixed in older systems. The educational philosophy of strict punishment, rote memorization, and ability grouping served to construct disability in schools through placing value on *one* way

of learning and only lifted students that excelled in this one way of doing things. The Monitorial system was not one that supported heterogeneity in the classroom, and Bhutanese teachers have had difficulty adjusting to a more inclusive pedagogical approach as the Royal Government has supported the complete school enrollment of *all* Bhutanese children (Jagar Dorji, 2008).

The historical solution to maintaining the Monitorial system – or similar practices – while also supporting the increasing attendance of a heterogeneous student population was initially through the provision of separate 'special' schools for children with disabilities (Snyder & Mitchell, 2006; Richardson & Powell, 2011). The first special school in Bhutan – *Zanglay Muenselling* ["clearing the darkness"] School for the Blind, now called the National Institute for the Visually Impaired (NIVI) or *Muenselling* – began in 1973 with impetus from HRH Prince Namgyel Wangchuck.[8] Two Norwegians were brought in to assist in the establishment of the school – Einar Kippenes and his wife, Reidun Kippenes. Throughout its history, NIVI has been supported by a cornucopia of exogenous funders and technical assistance groups, such as the *Kwinnliga Missions Arbetare* [Woman's Mission of Sweden], *Christoffel Blindenmission* [Christian Blind Mission of German], UNICEF, Bhutan-German Friendship Association, Save the Children, Japanese International Cooperation Agency (JICA), Danish Association of the Blind, and the Norwegian Agency for Development Cooperation (NORAD) (Kuenga Chhogyel, 2006; Interview, 17 May 2013).

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[8] HRH Prince Namgyel Wangchuck was the younger brother of the Third *Druk Gyalpo* and a patron of education and disability issues, as well as a career in the Royal Government. He also had a role in Bhutan's admittance into the United Nations in 1971.

Beginning in the 1980s, there was a gradual 'Bhutanization' of the educational system in which foreign teachers were beginning to be replaced by local teachers, the curriculum was moved from Hindi/Indian-focused to Dzongkha/English/Bhutanese-focused, and most of the schools that were independently operating came under at least partial control of the Ministry of Education (Singye Namgyel, 2011; Interview, 13 June 2013). For example, at NIVI, the Swedish principal, Philip Holmberg, was replaced in 1986 with a Bhutanese national, Nawang Namgyel ("History of NIVI," 2012). This replacement illustrates the broader process of how Bhutan historically imported its early modern education system but in recent decades there has been a slow 'Bhutanization' of the system. In addtion, there has been an effort to make education more culturally relevant to the Bhutanese students, but there is still significant educational policy borrowing. This has presented a greater challenge than before as policy makers and local actors have had to negotiate between what is 'local' and what is 'global;' what is 'universal best practice' and what is 'culturally unique best practice.' In other words, the Bhutanese who have been involved in making educational policy decisions since the 1980s have become much more assertive in ensuring that any borrowed policy are indigenized (Steiner-Khamsi & Stolpe, 2006).

While there has been a greater assertion of the Bhutanese on their own educational system, there still remains a significant transfer of educational ideas from certain parts of the world, most notably Europe and India, into Bhutan. At the same time, there are also significant challenges in trying to transform deeply entrenched views of education into these 21st century educational models. In the

next section, I explore the exchange and transfer of ideas in contemporary

Bhutanese educational policy, as well as analyze why some of these challenges may

persist.

*Contemporary Developments in Bhutanese Education: Understanding Ourselves,
Learning from Others*

> The Bhutanese have been very careful on what they have brought in. Before
> the digital age, there were limited choices. But now, the internet has brought
> so much choice ... but then how do you analyze what is good and what is bad
> information? We are still learning, and our educational level is rising, so
> people are more careful. Ultimately we pick and choose what is best.
> – Educational Bureaucrat (Interview, 13 June 2013)

The above quote is an exemplary articulation of the position of policy-makers in

contemporary Bhutan. Indeed, the Royal Government has been, and continues to be,

cautious in terms of what ideas and policies and implemented. As the global internet

network compresses time and space like never before, the speed and proliferation

of ideas, concepts, constructions, and worldviews enter Bhutan at a pace that is

barely manageable. The other interesting aspect of the above quotation is the

statement that Bhutan *chooses* what is best. In contemporary Bhutan, however,

there is much less control as to who advises whom and where ideas come from. In

this section, I will explore the contemporary educational policy process in Bhutan

through the development of inclusive education and special education. In order to

aid this analysis, I will be employing the analytical model of policy borrowing as

proposed by Phillips and Ochs and discussed in the previous chapter (2003; 2004).

Appendix E provides a visual diagram of their model.

In stage I of the policy borrowing model, Phillips and Ochs (2003) explore the impulses that attract local policy-makers to borrow policies. These impulses could be elements such as dissatisfaction by educational stakeholders, collapse of a previous policy, negative external evaluation, changes in the political or economic climate, or desire to innovate. In explaining this stage, Phillips and Ochs (2003) also draw attention to the context within the country that determines whether a borrowed policy will be adaptable, which they call 'externalizing potential.' The first impulse that I have identified that led Bhutanese policy makers to begin to develop educational services for children with disabilities was the impetus from certain members of the Royal Family. As was mentioned above, HRH Prince Namgyel Wangchuck was instrumental in the early development of special education and special schools with the founding of NIVI. Many other members of the Royal Family – including Ashi Sonam Choden Dorji, Ashi Kesang Wangmo Wangchuck, Ashi Dorji Wangmo Wangchuck, and Ashi Tshering Pem Wangchuck – have supported disability services in some capacity. The *Druk Gyaltsuen*, Jetsun Pema, has become a significant supporter of disability services in Bhutan and is the patron of several programs and civil service organizations (CSOs) related to this cause. The motivation of the Royal Family to support disability policies and services, I suggest, is that of charity, an expectation of service, and a genuine belief in the well-being of all Bhutanese citizens. Most of the major CSOs operating in Bhutan – especially the Tarayana Foundation and the Youth Development Fund – were initiated by royal backing and many continue to be run by members of the Royal Family.

Throughout over 100 years of Royal Government, the members of the Royal Family have consistently supported social development programs. However, as Dasho Karma Ura (2004) and Dasho Sonam Kinga (2009) have identified, many of the early *Druk Gyalpo* expressed dissatisfaction with their ability to affect change given the limited resources at their disposal. This limited scope led to a trickle of projects including NIVI and the slow implementation of schooling. This was changed beginning with the Third *Druk Gyalpo*'s modernization plans, post-colonial political shifts in the region, a vast increase in resources with the introduction of hydro-electric projects from India, and greater accessibility to global discourses and trends with improvements in communication and travel.

A second impulse for borrowing inclusive education policy in Bhutan, focusing on stage I of the Phillips and Ochs model (2003), is economics. The draft National Policy on Special Educational Needs (NPSEN) clearly delineates the economic rationale for increasing enrollment for students with disabilities in the following passage:

> *Education gives children with disabilities skills to allow them to become positive role models and join the employment market, thereby helping to prevent poverty ...* The provision of Special Educational Needs services in Bhutan will enable to break the cycle of invisibility and deprivation by *bringing every child with Special Educational Needs into the forefront of any developmental activity.* Educating children with Special Educational Needs will help them realize their inherent potentials, build their self-esteem, *enable them to earn livelihood and become independent productive and responsible citizens.* (MoE, 2012c, p. 6, emphasis added)

The Royal Government has, from the very beginning of the country's efforts at modernization, emphasized the importance of education to the Bhutanese economy. Now, with one of the other primary goals of educational development being

complete attendance and participation, the government is seeking to promote the economic participation of all children.

A third impulse located in stage one of Phillips and Ochs' (2003) policy borrowing model is that of an increased awareness of educational rights by individuals with the capacity to enact changes, such as members of the Royal Family, prominent members of parliament, and others in civil society. However, the decision to advocate for the right of a child with a disability to attend school becomes an independent and individual decision from a parent or family member. When I interviewed Class 7 students at Mountain Village School (17 July 2013), they enthusiastically affirmed the place of the student with a disability in the classroom, as well as the role of parent advocacy:

> Student 1: [Students with disabilities] are ... they deserve to stay in class because the parents are affording to come to school ... some come from far away ... some nearby ... and they are interested to read.
> Matt: What if learning is really hard for them?
> Student 2: We can help them, sir!

The primary reason why parents send their children with disabilities to school, and also one of the primary impulses for cross-national special education policy attraction in Bhutan, is the belief that children with disabilities have a *right* to be educated. When I asked the Principal of Mountain Village School the question, "Why do we include students with disabilities?" he replied immediately, "Because education is a right" (Interview, 17 July 2013). The very first policy statement in the draft NPSEN states, "Children irrespective of abilities shall have equal access and opportunity to education from early childhood to vocational/technical and tertiary without any form of discrimination" (MoE, 2012c, p. 8). Since education is *available*

for all children in Bhutan, but not necessarily a legal *right*, it is important to

recognize that the individual family member is the key actor in interpreting and

realizing educational rights for their children at this stage of the Phillips and Ochs

model.

It is also important to keep the Royal Government in this discussion of

educational rights because they are the primary drivers of creating and cultivating

these rights, or at least this is the perception of many of the Bhutanese whom I

interviewed. For example, one parent of a child with a disability had this to say:

> Now we see more and more disabled children. In the past, we didn't really
> know they were there; these kinds of children exist. And now the
> government is making effort, and NGOs are coming up, and now these
> children are brought into the public domain, and now we know that many
> are going to the school … Definitely it is changing. Government is facilitating.
> (Interview, 21 March 2013)

The Royal Government's strong commitment to the Education for All global

initiative set forth by UNESCO in Jomtien in 1990, as well as the education indicators

placed in the United Nations' Millennium Development Goals (MDGs), have made a

significant impact on the expansion of enrollment in schools (Ninnes, Maxwell,

Wangchuck Rabten & Karchung Karchung, 2007). The MDGs, in particular, have

been a strong guiding force for the development of education (Planning

Commission, 2007). The draft National Policy on Special Educational Needs is quite

explicit that international disability rights treaties, conventions, and declarations

have strongly influenced the drafting of this policy, listing the following influential

initiatives (MoE, 2012c, p. 5):

- The Convention on the Rights of the Child (CRC) ratified on 23rdMay,
  1990.

- The Convention on the Rights of the Persons with Disabilities (CRPD) signed on 21st September, 2010. *Awaiting ratification.*
- Millennium Development Goals [1995–2015].
- Adopted the Education for All – Dakar Framework for Action (1994).
- Signatory to the Proclamation of the Economic and Social Commission for Asia and Pacific (ESCAP) Commission on Disability on the Full Participation and Equality of People with Disabilities in 2008.

The prevailing sentiment that all children should go to school – which is also stated in the Bhutanese constitution (Art. 9, § 16) – is the dominant discourse, more so than an economic argument. The interplay between government and individual citizen in Bhutan is interesting to consider from a theoretical perspective – as introduced in Chapter Three – and will be discussed further at the conclusion of this chapter.

The other concept in stage I of cross-national attraction, according to Phillips and Ochs (2003), is the 'externalizing potential' of a policy. This is similar but not quite the same as Schriewer's (1990) concept of 'externalization' in which educational policies are borrowed or learned by governments to not only fix specific educational issues but to legitimize the government and its policies. To Phillips and Ochs (2003), 'externalizing potential' moves beyond the pre-conditional impulses to borrow and learn exogenous policies and examines why certain policies are chosen within the context of the country in focus. One externalizing factor in Bhutan in its contemporary educational strategy is a focus on infusing Gross National Happiness (GNH) into the classroom. While many Bhutanese educationalists agree, including former Minister of Education Lyonpo Thakur S. Powdyel (MoE, 2012b), that there is already GNH in the classroom because of existing Bhutanese cultural elements, there has been a current push to greater realize the full value of learning in a GNH-

rich environment. In other words, the Ministry of Education is looking outward to help them figure out how to connect current policy and practice to external discourses.

While Bhutanese policy makers are looking outward, foreign educationalists are looking more carefully at what some consider a model nation for its emphasis on happiness and contemplative practice in its schools. As I touched upon at the beginning of this chapter, many Westerners imagine Bhutan in a certain pre-conceived way because of its monastic and royal traditions and its more recent development of GNH. The former Prime Minister Lyonchhen Jigme Y. Thinley's speech to the Education for GNH Workshop indicates the extent of this idealization by international policy actors:

> The eyes of the world are literally on us, and – while our immediate concern is what to do in our own schools, as it should and must be – we should also be fully aware that what we are now doing has huge significance for the world … The international educators who came here last month told us very bluntly that what we are doing reflects their own deepest aspiration and that they will stand with us in full support as we proceed. (MoE, 2012b, p. x)

In this passage, the Prime Minister illustrates what Schriewer describes as 'externalization' in that what many policy-makers in Bhutan are doing is legitimizing an indigenous policy by finding external policies and international 'experts' who support it. At the same time, many international 'experts' are promoting Education for GNH beyond Bhutan because it fits within their agenda of creating an alternative global vision of education. For example, Young (2012) argues that Bhutan should be a pilot country for 'contemplative critical pedagogy' implementation, and she invokes GNH in her argument.

Inclusive education also fits within the Education for GNH strategy in that the philosophy of GNH strives to *"maximize the happiness of all Bhutanese and to enable them to achieve their full and innate potential as human being [sic]"* (cited in MoE, 2012c, p. 5). Inclusive education is viewed as a way to enable these goals, and around the world it is often cited as a policy solution to reach national equity and educational philosophy goals (Schuelka & Johnstone, 2012). For example, the Principal at Inclusive Thimphu School noted, "Inclusive education is non-negotiable for us with Education for GNH" (Interview, 21 May 2013). Another teacher at Inclusive Thimphu School also noted, "If we are going to educate in a GNH setting, then every child matters" (Interview, 21 May 2013).

Another externalizing factor – from stage I of the Phillips and Ochs (2003) model – that informs Bhutanese policy borrowing is an emphasis on service delivery and technique. For example, the policy for children with disabilities in Bhutanese schools is called "Special Educational Needs" and *not* "Inclusive Education." I argue that the reason behind this is that "Special Educational Needs" implies specific educational services for children with disabilities. The policy, in many ways, is an inclusive education policy. However, using the term 'inclusive education' would perhaps signal a greater philosophical shift in educational thinking that might also question the larger inclusivity of the Bhutanese school system around religion, language, culture, and ethnicity. "Special Needs" very clearly pertains to children with disabilities. As Ainscow, Booth, and Dyson (2006) explain, there is a lot of confusion pertaining to the use of terms like 'inclusion,' 'mainstreaming,' 'special education,' 'integration,' and the like. For many countries, 'inclusive' education

merely means offering an educational option to children with disabilities, which often translates as a special school, segregated classroom, or residential tutoring (Kozleski, Artiles & Waitoller, 2011; Schuelka & Johnstone, 2012).

The paramount typology at play in Bhutan as an externalizing factor is "Inclusive as concerned with disability and 'special educational needs'" (Ainscow, Booth & Dyson, 2006). This typology is evident in the NPSEN as it assumes that inclusion is targeted specifically to children with disabilities, that they are somehow different and excluded from their peers, and that schools need to 'mainstream' them. Ainscow, Booth, and Dyson critique this typology by stating, "We question the usefulness of an approach to inclusion that, in attempting to increase the participation of students, focuses on a 'disabled' or 'special needs' part of them and ignores all the other ways in which participation for any student may be impeded or enhanced" (2006, pp. 15-16). In Bhutan, this is most certainly the case, and 'mainstreaming' often takes on the meaning of providing a special, segregated, educational experience. For example, the Vice Principal of a Mountain Village School and I had this exchange:

> Matt: Should schools include students with disabilities?
> Vice Principal: They won't be happy to be included, because they will be
> compared to higher learners. There should be special schools –
> smaller schools – where there is more attention by teachers. It is
> better to have special schools because everyone is the same. In normal
> schools they would feel lonely. They would need more boarding
> facilities. (Interview, 17 July 2013)

An interview with a top official in the Ministry of Education also indicated his preference for special schools and separate boarding facilities. He was cautious to use the phrase, "schools that offer special education services" instead of special

schools. When asked what he thought about the fact that all schools in Bhutan can deny students with disabilities from attending their school, he noted, "this is good because schools don't have the capacity" (Interview, 17 May 2013). The draft NPSEN supports this assertion by the top official through policies 5.2 and 5.3:

- 5.2   There shall be specialized educational services with appropriate support services and facilities including teaching learning materials, assistive devices, access and sanitation infrastructure, etc. for children with severe disabilities in identified institutes.
- 5.3   Children with mild to moderate disabilities shall be mainstreamed or integrated into schools with appropriate facilities and support services. (MoE, 2012c, p. 8)

What is important to note is that use of the term "appropriate support services and facilities," which leaves interpretation wide open to assume that the Ministry also means *separate* services and facilities for children with severe disabilities. Also, in the endnotes of the policy, the term 'mainstreamed' means – according to the Ministry of Education – that a child with a disability may spend or all of his or her day in a 'special' classroom. It appears that the Bhutanese understanding of the term 'inclusive education' means that it specifically targets youth with disabilities and that it means youth with disabilities are provided *some* sort of education *somewhere*. Singal (2006) notes that this has also been the interpretation of 'inclusiveness' by India, so it would makes sense that Bhutan has a similar interpretation given the influence of India in Bhutan historically and still to a significant degree today (Bach, 2009; Bagley & Verma, 2008; Singal, 2006).

In Stage II of Phillips and Ochs (2003) model of policy borrowing, governments and other agencies must make decisions as to what changes need to be made to the policy and how this process will proceed. One way to make new policies

that borrow from elsewhere is the *quick fix*. This is a practice that transfers policy

for short-term solutions and often for political gains. The *quick fix* often involves

directly lifting a whole policy from somewhere else and transferring it directly to

local policy. In relation to the Bhutanese case, the Royal Government has

theoretically made the decision to promote education as a vital institution for

economic and social development, 'Education for All,' and as right for all Bhutanese

citizens. However, the government's adoption of inclusive education and special

education models do not necessarily constitute a *quick fix* because this is not a case

of directly lifting a policy from another country and placing it into another to solve a

specific problem (Spreen, 2004).

Another aspect of policy decision making in Stage II involves what Phillips

and Ochs (2003) call phony decisions. They define these decisions as cases involving

a policy-maker implementing borrowed policies because the policy looks good or it

may present an ideological fit to a perceived problem in the educational system.

However, the borrowed policy is unlikely to actually be fully realized within the

country. The policy may also prove to be a poor fit to the local context, but it is still

appealing to both the policy-maker and to the international community – again,

harking back to Schriewer's concept of *externalization*. To Fuller (1991),

transferring educational policies can serve as a signal of modernity and progress,

even if the 'reform' is ultimately empty and irrelevant.

In the case of Bhutan, there is a certain element of phony decision making,

and 'policy speak' and 'global talk' (Steiner-Khamsi & Stolpe, 2006), in the wording

of the draft NPSEN. The 'global talk' element of the draft National Policy comes into

focus when discovering *who* made the draft policy and *how* the draft policy was made. Appendix III of the draft NPSEN lists all of the members involved in the drafting of the policy (MoE, 2012c), and a significant number of the Bhutanese members involved in the policy's formation studied educational policy and administration in Australia or the United States. Also on the list are members of UNICEF, the Bhutan Foundation (US-based international non-governmental organization), and the Bhutan-Canada Foundation. Yet, to reference one of the prevailing themes of this chapter, all of these organizations were invited to be a part of this policy process by the Royal Government; they did not demand to attend as a prerequisite for funding. The influence of Bhutanese bringing ideas and international discourses back to Bhutan from abroad also serves to make the draft NPSEN look and feel similar to like-minded policies and discourses around the world. This would seem to support the notion of isomorphism proposed by world culture theorists (Ramirez, 1997). However, as Stieiner-Khamsi (2010) argues, the appearance of isomorphism is often merely 'global speak,' and the actual reality of policies can be much different (e.g. Anderson-Levitt, 2003). The two themes that are prevalent throughout this chapter – the importance of individuals in educational policy transfer and the invitation to foreign assistance rather than the imposition –
 are clearly visible here. To some degree, Vavrus's (2004) argument of a 'referential web' of policy transfer – where the language of policy is not a direct reference to a specific country – is a good summation of the complex network of exogenous ideas that serve to form the draft NPSEN.

Moving into stage III of the Phillips and Ochs (2003) model – *Implementation* – the draft NPSEN begins to become adapted and, ultimately, indigenized. Bhutan's scenario of policy implementation is unique in that each and every policy that is proposed must be approved by the Gross National Happiness Commission (GNHC) before it can become ratified by parliament. The objectives of the GNHC are as follows:

> The GNHC shall ensure that GNH is mainstreamed into the planning, policy making and implementation process by evaluating their relevance to the GNH framework of:
> i.   Developing a dynamic economy as the foundation for a vibrant democracy;
> ii.   Harmonious Living – in harmony with tradition and nature;
> iii. Effective and good governance; and
> iv.   Our people: investing in the nation's greatest asset. (Gross National Happiness Commission, n.d.)

The use of the GNHC to help guide policy ensures that the overall development paradigm of GNH – as envisioned by the fourth *Druk Gyalpo*; continued by the Centre for Bhutan Studies and the GNHC – maintains itself beyond the political changes that occur in parliament. The GNHC makes comments as to how policies align (or not) to the development paradigm of GNH and sends the policy back to the policy drafting committee for revision. Again, *all* policy in Bhutan needs to be paradigmatically aligned, and the GNHC is instrumental in maintaining that uniformity. This is another example as to how Bhutan indigenizes and 'creolizes' exogenous ideas and policies.

The implementation of the draft *National Policy on Special Educational Needs* is still in a holding pattern. As of this writing, it has gone through the GNHC with minor revisions but has not reached the Parliament for ratification. Mainly, this slow

down is related to the elections and change in government that occurred in the Spring and Summer of 2013. It is likely that there will be challenges to fully implementing the NPSEN because, as mentioned above, the wording of the draft NPSEN is quite idealistic and far-reaching. Moreover, the full implementation of the NPSEN will require significant resources that the Ministry of Education does not have. Currently, UNICEF funds the majority of the funds for the Special Education Unit (SEU) within the Ministry of Education, with additional support from the Bhutan Foundation and other international donors (Interview, 17 May 2013). In all, the entire budget of the SEU comes from external sources and not from the Ministry of Education or the Royal Government. This would seem to support a world-systems theoretical perspective, which I will address in the concluding section of this chapter, but another interpretation more consistent with a global constructivist perspective is that this inclusive education policy is Bhutanese-driven and – perhaps – idealistic. In other words, the Royal Government and the Ministry of Education have set ambitious educational goals first, and after this agenda-setting do they seek out funds. That order of policy formation – agenda first, then funds – is important for the reader to keep in mind.

Another challenge in the implementation of the NPSEN is the delineation between the various governmental ministries and units. As a whole, the Bhutanese government is very siloed, which means that none of the various ministries collaborate regularly, even when they have a joint stake in the outcome. This can be especially problematic for disability services, in that disability is a multi-

dimensional phenomenon that can encompass societal domains such as education, health, housing, public works, employment, and transportation to name just a few.

The final stage of the Phillips and Ochs (2003) policy borrowing model – *internalization/indigenization* – has not completely occurred as of this writing. However, in the next chapter I will explore the challenges in trying to change 'disabling' structures entrenched within the existing system.

This section has shown that even though the Royal Government largely defines the policy agenda, its policies are shaped by the diversity of ideas that enter the country from exogenous sources. Bhutanese policy-makers interpret and implement these ideas as best they can, with the aid of the GNH framework. However, mixed signals and paradoxical messages can make interpretation difficult. In the next section, I will explore aspects of exogenous discourse that can lead to confusion about how to construct and conceptualize disability and disability services.

Exogenous Constructions of Disability: The Medical Model, the Rights Model, and a Multitude of Voices

> I'm going to assume that this [neurodevelopmental model] is the same in Bhutan as it is in the United States.
> – Lead doctor from US 'expert' team (Field Notes, 5 December 2012)

A parent of a child with a disability stands before a Disability Forum at YDF Hall in Thimphu. It is December, and there is no internal heating in the auditorium, so the audience does its best to keep warm through hats, gloves, and small electric heaters scattered throughout the large auditorium. Despite the cold, the parent addressing the hall is full of vigor and passion. He mentions how he used to think about

disability as a sin, a misdeed, a transgression having to do with karma. Now his mind has changed, through his child and through his work with UNICEF. He looks directly at the audience and says, "we must challenge these things in the scientific age" (Field Notes, 3 December 2012).

Reflecting back on this forum, besides the memory of being chilled to the bone in my *gho*, I am struck once again by the weight of this parent's statement. What has led him to the conclusion that 'we' must challenge thousands of years of knowledge? Why does he assume that the 'scientific age' will be any better than before? What is his definition of progress? Looking around at the audience members during this speech, I saw a lot of nodding heads from parents of children with disabilities, from those that work in disability services in Bhutan, and especially from the visiting medical team from the United States. There is an assumption in the global discourse on disability that progress needs to be made, that previously-held ideas need to be challenged. However, it matters *how* these ideas get challenged and *what* they get replaced with. In this section, I will explore several global discourses on disability that are permeating Bhutanese disability discourse today. The two most important discourses to understand are that of the medical model and the rights model. By enmeshing themselves into a 'referential web' of networks (Vavrus, 2004), the exogenous voices entering Bhutan present a contradictory message on constructing disability.

Using this week in December 2012 as an example, I argue that the two dominant discourses entering Bhutan at the moment are the medical model and the

rights model. Siebers (2008) explains these two models succinctly, although I use

the terminology of 'rights model' while he uses the term 'social constructionism':

> The medical model situates disability exclusively in individual bodies and strives to cure them by particular treatment, isolating the patient as diseased or defective, while social constructionism makes it possible to see disability as the effect of an environment hostile to some bodies and not to others, requiring advances in social justice rather than medicine. (p. 54)

The domain of disability in society, according to the medical model, is physical

abnormality and deviance. This requires norming a population to determine what is

'normal' and what is 'abnormal,' which traces its history back to the international

eugenics movement of the 19th and 20th centuries (Davis, 1995; Snyder & Mitchell,

2006). In this model, disability is viewed as an opportunity to cure, rehabilitate, and,

generally, to 'fix' the deficit.

In contrast, the rights model – or what Siebers and others refer to as the

social model – suggests that the disability is not really in the body of the individual

but, rather, that it is the social and physical environment that 'disables' a person. I

choose to use the 'rights model' term instead of the 'social model' term because

purveyors of this construction of disability tend to advocate the use of legal systems

to empower the rights of persons with disabilities (e.g. Armstrong & Barton, 1999;

Peters, Johnstone & Ferguson, 2005). This approach is a complete subversion of the

medical model in that the placement of blame shifts from the individual to the

society that oppresses the individual. This idea was at the heart of the US disability

civil rights movement, not to mention many other civil rights movements both in the

US and around the world (Shapiro, 1993). Much of the international discourse

around disability rights coming from the United Nations and its satellite of

organizations advocates the position of the rights model, including the influential

Convention on the Rights of Persons with Disabilities (UN, 2007; Schuelka &

Johnstone, 2012). The rights model is not without its criticism either. For instance,

many scholars worry that creating universality among persons with disabilities –

their experiences and their rights – is problematic (Armstrong & Barton, 1999;

Ingstad & Whyte, 1995; 2007; McDermott, Edgar & Scarloss, 2011; Siebers, 2008).

The rights model is influential to disability construction in Bhutan because

United Nations initiatives are influential in Bhutan. As was mentioned in the

previous section, UNICEF plays a significant role in educational and health funding

and in providing technical expertise. In the lead-up to the International Day of

Persons with Disabilities on December 3rd, UNICEF-Bhutan sponsored several mini-

events, including a poster contest on the theme of "Removing barriers to create an

inclusive and accessible society for all." On a field visit to Thimphu Public School, I

observed the students of Class I dutifully creating posters around this theme full of

smiling children and beautiful scenery:

> The students of classes pre-primary through Class III were assigned the
> theme of "friendly school," to which the teacher holds a UNICEF calendar up
> as an example. The calendar features pictures of students' drawings from
> around the world that are focused around the Child-Friendly Schools UNICEF
> initiative. The students are distributed paper and instructed on what a
> 'friendly school' may look like. (Essentially, they were told what to draw
> instead of coming up with their own ideas.) Students very intently take to the
> task of drawing – many students work hard to get intricate details of the
> school buildings they are making, their drawings taking on the detailed and
> intricate character of the murals that adorn the walls of *lakhang* [temples]
> and *goemba* [monasteries]. Some students do not have pencils to make the
> drawings, which is of concern to other students at the table. One student with
> a disability begins crying when her pencil is stolen. Some other students try
> to console her while the teacher negotiates the situation, eventually finding a
> pencil for the student. The drawings at each table begin to look similar to
> each other over time as the students copy from each other. Curiously, most

drawings also are very similar to the pictures from the UNICEF calendar. (Field Notes, 29 October 2012)

This observation highlights the character of task-work in the Bhutanese classroom – being told what to do and then working collaboratively to reproduce it – which also suggests that the students are accepting the task of drawing Child-Friendly Schools without much introspection. They faithfully reproduce the UNICEF calendar and the drawings of their peers, perhaps assuming that schools should be this way and that adults should make it this way, but never engaging in a conversation about how they, themselves, can cultivate a more inclusive classroom.

Similarly, adults can engage in inclusive education discourse – reproducing ideas, words, and phrases – without fully reflecting on the responsibilities that accompany a shift in paradigm and the implications to society. For example, a very high ranking Bhutanese government official at the Regional Seminar on Inclusive Education remarked, "The establishment of NID [National Institute for Disability, also called *Muenselling*] opened up many opportunities. Once [persons with disabilities] overcome their difficulties, they can join the mainstream" (Field Notes, 3 December 2013). This is an excellent example of the concurrent and contradictory discourse that is present in Bhutan at the moment. The government official is praising a special schools model and situates disability as something that is something that can be 'overcome.' At the same time, the government official is also advocating an approximation of inclusion and the right to 'join the mainstream.' However, the Prime Minister of Bhutan, Lyonchhen Tshering Tobgay, addressed the participants of the Regional Seminar and stated, "access to education alone is not

inclusive education" (Field Notes, 3 December 2013). This message is most closely

aligned with the current discourse around the rights model.

During the Disability Forum on the evening of 3rd December 2013, there

were several international rights-based initiatives that were cited as influential to

Bhutan's disability rights development. These were the Convention on the Rights of

Persons with Disabilities (UN, 2007), the Incheon Strategy to "Make the Right Real"

for Persons with Disabilities in Asia and the Pacific (UN ESCAP, 2012), and the

Biwako Millennium Framework for Action Towards an Inclusive, Barrier-Free and

Rights-Based Society for Persons with Disabilities in Asia and the Pacific (UN ESCAP,

2003). As noted in the previous section, several international human rights-based

initiatives were cited as informing the draft *National Policy for Special Educational*

Needs (MoE, 2012c). There is not necessarily agreement on what exactly the *right* to

an education means for children with disabilities, but there is agreement that

children with disabilities have a right to *something* educational.

Similarly, at the Regional Seminar in December 2013, there were many

instances of reference to international and regional human rights initiatives

pertaining to disability. The CRPD was mentioned repeatedly by certain key

disability advocates, practitioners, and policy-makers – as were other regional

initiatives such as Biwako and Incheon that were also mentioned at the forum on

December 2012. The most representative discourse, and relevant to my overall

argument in this dissertation, is the personal testament by an official at the Ministry

of Education pertaining to his own developing thinking around disability rights. He

first attended a seminar on disability rights in Islamabad in 1993. In 1998, this

official traveled to Australia and was a "witness to possibilities in access, inclusion,

and empowerment" (Field Notes, 3 December 2013). He had a similar experience in

Japan in 2002. In his presentation, he also had this to say,

> The concept and definition of disability depend on how you look at it. From one perspective, that evolved over time from a simplistic notion that any person with an impairment of mind and body is disabled. This does not consider the relationship between an individual and the environment. No matter how you view it, it is a right of people with disabilities to access resources within their society on an equal basis with others. In that context, the Royal Government of Bhutan has shown its political will with the ratification of the Convention on the Rights of a Child – Article 23 of the CRC declares, "States Parties recognize that a mentally or physically disabled child should enjoy a full and decent life, in conditions which ensure dignity, promote self-reliance and facilitate the child's active participation in the community. (Field Notes, 3 December 2013)

Another presenter – a Bhutanese citizen who works at the National Hospital

– indicated that his thinking was influenced by his time spent in the United

Kingdom. He used many references to international disability rights initiatives such

as the International Day of Persons with Disabilities, the CRPD, and others. (Field

Notes, 4 December 2013). Important to note on this presentation is that this

presenter felt that it was his responsibility to travel extensively throughout Bhutan

to raise awareness on disability rights. During his presentation, he remarked, "we

can influence society to change their attitudes" (Field Notes, 4 December 2013).

What these presentations illustrate is that it was this official's individual

experiences that served to inform his own views on disability and its construction in

Bhutan. They are clearly arguing for a rights-based approach on disability.

Especially cogent is how these presenters clearly separate a rights-based approach

with previous local conceptualizations of disability in Bhutan. This was not

something explicitly brought into Bhutan by a foreigner or organization, but rather

was introduced into Bhutan through personal global exposure of a Bhutanese citizen. Both presenters use their relative position of influence to try to shape disability construction towards a rights model approach.

The International Day of Persons with Disabilities Special Olympics event in December 2012 also promoted a rights-based approach to conceptualizing disability, although this represents how international organizations are shaping discourse. First of all, the event took place because of international call from the United Nations to hold events worldwide to promote disability rights (UN Enable, 2012). In the message on the International Day of Persons with Disabilities from the UN, which was disseminated amongst the various Bhutanese organizations that work with persons with disabilities, UN Secretary General Ban Ki-Moon had this to say, "Together, we must strive to achieve the goals of the United Nations Convention on the Rights of Persons with Disabilities: to eliminate discrimination and exclusion, and to create societies that value diversity and inclusion" (UN Enable, 2012, "Message on International Day of Persons with Disabilities"). By holding this event in Bhutan, it signals that international rights-based discourse on disability resonates amongst the event organizers and also serves to promote the rights model agenda amongst the general population. For example, media coverage of the event was in all of the national newspapers. One article provided this statement:

> Although teachers and students face challenges, in terms of resources, teaching strategies and counselling skills, among others, their expectation is to learn social skills, and change attitude of the rest of the people, and community awareness on choices of names to call people with disability … Some roles and responsibilities that need to be recognised was with regards to the needs of a child by the family, support and assistance to the family by the community, and government support through infrastructure. (Sonam Choden, 2012, 4 December, pp. 1-2)

The quote from this article identifies that disability can be thought of more holistically than placing the onus directly on the individual impairment. It also suggests that there is a need to raise awareness of disability in the community. At the International Day event, one of the key speakers – a high-ranking government official – proclaimed, "We need to make the right real" (Field Notes, 3 December 2012). This phrase is the exact title of Incheon Strategy (UN ESCAP, 2012) that was also mentioned at the Disability Forum that same evening. Thus, regional/international discourse can be seen as having an effect on the language usage of rights-based discourse in Bhutan. At the Regional Seminar in December 2013, "Make the Right Real" was also used several times throughout the presentations, as well as phrases such as "Nothing About Us Without Us" – which is another common phrase in international disability rights advocacy that was commonly used in the United States during the disability rights movement of the 1980s and 1990s (Charlton, 1998).

Another way in which the International Day of Persons with Disabilities December 2012 event promotes the rights model of disability is that the event was also a Special Olympics event. The Special Olympic organization, while being interested in health and medicine, is primarily a disability awareness and empowerment organization. For example, the Special Olympics website proclaims, "We believe in a world where there are millions of different abilities but not disabilities. And we're spreading this message everywhere - at big Special Olympics events and small ones" (Special Olympics, 2013). While the Special Olympics, and the United Nations, are big organizations that purvey rights-based disability

discourse, it is the still the individual actor that export/imports, internalizes, and promotes these ideas.

The case of Bhutan presents a unique opportunity to observe this phenomenon because the actors disseminating rights-based disability discourse are a small and identifiable group and because this discourse is still quite new in the country. The Special Educational Needs Coordinator, along with the Principal, at Thimphu Public School hold many public events that promote disability awareness and acceptance (Field Notes, 8 November 2012). The Director, in an interview, had this to say:

> Government is bringing people from outside. They share their ideas from their country. That's how our people's way of thinking about disability … I think … is slowly changing. It will take time – many many years – I don't know. Acceptance is there now. In the school itself, we can find out that more and more children are coming in. Parents are more accepting. Now they know that these people can do. (Interview, 21 March 2013)

This quote is particularly important in that it highlights several of the major findings and themes of this research. First, this quote points to the fact that the Royal Government is the main force behind educational development in Bhutan, but it is also responsible for bringing in "people from outside" that "share their ideas from their country." Second, this quote suggests that the place of changing perceptions regarding disability is happening in the schools. Finally, and germane to this section in particular, this quote also highlights that there is a certain progression in thinking about disability and that influencing the parents and raising awareness about disability increases societal acceptance – "now they know that these people can do." This serves to frame disability not as an individual problem, but as a societal

problem. It is *society* that must accept persons with disabilities, eliminate barriers, and empower rights.

Other events that I observed in Bhutan in 2013 also brought a rights-based disability perspective to public awareness and discourse. In April 2013 there was another public event – similar to the International Day of Persons with Disabilities in December 2012 – that promoted autism awareness and its importance. This was held on World Autism Awareness Day, which is a global event initiated by the United Nations and advanced by Autism Speaks, which has a global presence and influence in disability discourse. The Facebook page for World Autism Awareness Day proclaims, "7000 Landmarks & Buildings / 90 Countries / 750 Cities / 7 Continents." An event to "Light it Up Blue" (the theme of World Autism Awareness Day) was held at Clock Tower Square in Thimphu and, indeed, the clock tower was lit blue for the event. Several prominent speakers espoused about autism awareness and there were many performances by youth with disabilities to commemorate the day.

Another event that was held in 2013 was the Family Health Forum, sponsored by the Special Olympics and hosted by the Program Officer at Thimphu Special School in June. While most of the talks were in Dzongkha, the selective use of English was present when discussing international human rights treaties. Specifically, the Convention on the Rights of the Child (CRC) and the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) were mentioned. Like the referencing of human rights treaties and initiatives during the December 2012 disability forum, explicitly using the names of these treaties and

initiatives signals a certain perspective on rights in Bhutanese society. It recognizes

that an international discourse has relevancy to Bhutan.

School officials, government officials, and civil society organization

employees are also aware of the rights model approach to disability and are active

participants in advancing that agenda. Because schools in Bhutan are not required

by law to accept students with disabilities, the few principals that push for greater

inclusivity in their own schools and *do* accept students with disabilities have some

of the more influential voices in policy implementation. The Principal of Mountain

Village School is one of those principals. In an interview, he expressed that

"education is a right, and therefore we must include students" (Interview, 17 July

2013). The Director of Bhutan Ability Center also was quite adamant that Bhutanese

society "needs to change. Needs to accept people with disabilities. They have a right"

(Interview, 15 July 2013). A top-ranking educational official in the Ministry of

Education expressed, "Inclusive education seems to be the global norm" (Interview,

17 May 2013), reinforcing both the influence of global discourse and the recognition

that inclusive education – a more rights-based model than special education – is

something to strive towards.

One of the more powerful incubators of the rights model in Bhutan is

UNICEF. In interviewing the officials at UNICEF-Bhutan, they indicated that the first

mention of inclusive education in Bhutan was in the late 2000s as UNICEF was

promoting Child-Friendly Schools. The officials at UNICEF-Bhutan see their role as

actively shaping education policy through a rights-based approach (Interview, 28

May 2013). While UNICEF may be an influential organization within Bhutan, the rights-based message is being carried out by individual actors across Bhutan.

In contrast to these rights-based events, the "Workshop on Management of Speech and Development Disorders in Children" during the 5th–7th of December 2013 presents a different model of disability. It is important to note that many of the same people that attended the International Day also attended the three-day workshop on speech and developmental disorders. This workshop was given by a group of visiting doctors and clinicians from the United States and, from the very beginning, set a different tone than the testimonials given by parents at the Forum on the evening of the 3rd of December.

There were several dominant themes of the workshop that set this contrasting tone. The first became apparent right away, namely, the "other worlding" (Katz, 2004) that was be created by both the US 'experts' and the Bhutanese themselves. The lead doctor in the group, in the very first session and on numerous occasions, referred to the US as "wealthy" and "developed" and to Bhutan as "developing" (Field Notes, 5 December 2012). In another session, the lead doctor downplayed traditional Bhutanese medicine – which he called "natural remedies" – which is reminiscent of Pigg (1995) when she discusses the interactions of international development practitioners and their encounter with local conceptualizations of medicine and healing in Nepal. She writes:

> [U]niversalizing principles inherent in development discourse systematically dismantle and decontextualize different socio-cultural realities in the course of taking them into account. Development institutions are thus positioned as authoritative mediators of all local worlds. Translation is a social act that, through the management of the circulation of discourses, reinforces the particular global-local power relations of international development.

Relations of power, as well as stales of health, are at stake in health development encounters. (p. 47)

The American doctor also made the statement, "Every family with a child with autism in the US has an iPad" (Field Notes, 7 December 2012). Not only is this not true, but it has the discursive effect of establishing a privileged position of wealth and status for those from the US. By stating to the Bhutanese audience that every American family with an autistic child can afford an iPad, while very few families in Bhutan can afford an iPad or even have access to a place in which to obtain one, the doctor reinforced his authority by creating the illusion that wealth and affluence are equated with knowledge.

Another way that privilege and distancing were produced at the workshop was through the materials that the US 'experts' used during their presentations. These were all US-based, including statistics on internet and television use, a video of a child from *The Today Show*, screening tools for ADHD (i.e. the Vanderbilt Questionnaire and the SNAP IV), and every quote and reference in the slides. There was no inclusion of examples from Bhutanese research, contexts, parents, or policies during the vast majority of this workshop (Field Notes, 7 December 2012). During the 'Vote of Thanks' – a customary Bhutanese ritual that follows every presentation by a perceived 'authority' figure – the Bhutanese speaker expressed his thanks that the US 'experts' were here to "teach us about things that we do not know about" (Field Notes, 5 December 2012).

In addition to the theme of authoritative knowledge that persisted throughout the workshop, a second theme was the notion of universal norms. One of the main purposes for the workshop was to better diagnose children with

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disabilities – even though a disability label has no legal or practical bearing on services in Bhutan. The epigraph that opened this section is a perfect exemplar of this mentality in that it shows how the doctor assumed that neurodevelopment is a universal phenomenon, rather than one that can also be influenced by culture and environment. The first presentation during the workshop on "Normal Child Development" spelled out the stages of child development that were normed on a US population but then presented as 'universal.' In a later presentation, the lead doctor spoke on "Developmental Surveillance" and stated, "Once you have those norms, then we have something to compare to in order to find difference" (Field Notes, 7 December 2012). The construction of disability as being about 'norming' places this discourse squarely in the guise of the medical model.

The last theme that immerged from the December workshop was the specific medicalized language that was used. Throughout the workshop, the language of 'normal' and 'abnormal' was used, as well as descriptors such as 'atypical,' 'different,' and 'deviance.' These words are firmly situated in medical model discourses, and they construct disability as being a symptom within the individual in relation to societal 'norms.' The rights model, in contrast, reverses this thinking and, instead, focuses on the barriers and constructions placed upon persons that make them 'disabled.' When stressing the need for early diagnoses, the lead doctor stated, "diagnoses are made for atypical, different, or abnormal children in relation to normal childhood development" (Field Notes, 7 December 2012).

In sum, this workshop can be seen as contributing to the disability discourse and construction of disability in Bhutan in several ways. It is further medicalizing

disability discourse because it was expert doctors from the US who ran the

workshop and focused entirely on diagnosis and treatment of the individual person.

While there was some mention of the environmental and contextual factors

surrounding disability – on one slide using ideas from the book *From Neurons to

Neighborhoods* (Shonkoff & Phillips, 2000) – the conversation consistently refocused

on the individual 'impairment,' how to properly diagnose, and the various treatment

options associated with that diagnosis. Already, much of the disability services

provided for the entire country are offered within the Jigme Dorji Wangchuck

National Referral Hospital (JDWNRH) in Thimphu rather than in schools, clinics, and

specialized home and community services, as is done in many high-resource and

low-resource countries alike (Schuelka & Johnstone, 2012). The most common

'treatment' for disability is physical therapy and, indeed, a majority of the audience

attending the workshop were physical therapy aides. Both of the primary civil

society organizations that work with youth with disabilities – Thimphu Special

School and the Bhutan Ability Center – originally operated within the JDWNRH.

Regionally, medical language permeates the disability discourse – especially in India

(Schuelka, 2010; Singal, 2006). This has certainly had an influence on the Bhutanese,

since many of those that work with persons with disabilities received their training

from India. For example, the Head Teacher at Thimphu Special School received his

diploma from the National Institute for the Mentally Handicapped (NIMH) near

Hyderabad, India, and many other people that work in disability services that I

interviewed had received training at NIMH or elsewhere in India. Together, the

medical discourse at the workshop, the location of the majority of disability services

at JDWNRH, and the training of many disability service delivery personnel in

medicalized environments produce a construction of disability based on the medical

model of individual impairment.

The need for a medical diagnosis to conceptualize disability is a strong

narrative that is fairly pervasive in Bhutan. For example, the Program Officer at

Thimphu Special School stated, "parents are confused when their child obviously

has a disability, but no diagnosis is given. There is a strong expectation that a cure

can be found" (Interview, 14 March 2013). Similarly, a parent of a child with a

disability and I had this exchange during a focus group session:

> Matt: Is it a relief to know the diagnosis? Does that help? Or…
> Parent 1: To be diagnosed?
> Matt: Yes, to actually have a name for something …
> Parent 1: Yes, then you get the right treatment. Otherwise, trying to find out what the problem is then we do a lot of tests … I think the best is to have a real diagnosis and then the right treatment. In Bhutan, we don't have – I don't know right now how it is, but those days we didn't have anybody to say that 'this was the diagnosis.' We sent to India and then … through the scanner … It's now we have the MRI and the CT scan, but those days we didn't have so we had to be sent to India to get all those treatments.
> Matt: And a lot of Western experts come in to talk about diagnosis? Maybe not necessarily treatment…
> Parent 1: Diagnosis is the most important right now to get the right treatment. Right now if you see a small baby you don't know what's wrong with her and then you try, with diagnosis you get so many medicines and that medicine affects the child. Sometimes it defects the child's brain, also.
> Parent 2: Like she said, when it comes to treatment and diagnosis, still we are not really getting what we are expecting. When we go to hospital, the wrong diagnosis delays the treatment …
> Parent 1: When the doctors give medicine, they have doubts, and then I feel so scared to give that medicine also. What if that reacts? So that's why I feel diagnosis most important … *correct* diagnosis.
> Parent 2: You feel comfortably once you know that this is his or her problem. Then you know what to take care of. When you don't know what it is, then there is a problem.
> Parent 1: We still have many children here that are still without diagnosis.

Maybe LD?
Matt: Like dyslexia…
Parent 1: It's just a guess. We don't know exactly what that child needs. If we
            have the correct diagnosis then we may know … maybe in the school
            we can help them.
(Focus Group, 21 March 2013)

What is intriguing about the above exchange is that while both parents express an

interest and strong support for diagnosis, there is skepticism in their belief in the

hospital and the doctors to make the correct diagnosis. Both a belief in the power of

medicine to heal, as well as to harm, is present. This could be why the emphasis of

the December 2012 workshop, and other discourses, is particularly on diagnosis –

because misdiagnosis is a particular problem, either perceived or real.

The workshop also served was to situate 'authority' and 'knowledge' in

foreign – in this case, US – experts and not in the disability community in Bhutan.

When foreigners come to Bhutan and work with people to develop or enhance

something, they are almost always referred do as an 'expert' or – in a group – the

'expert team.' This terminology situates the Bhutanese away from 'best practices'

and 'universal knowledge,' and marginalizes their expertise in understanding their

own context and culture. Even statements like the epigraph, where the lead doctor

assumed sameness in Bhutan and the US in terms of knowledge and understanding

of disability serves to further distance the Bhutanese from expertise because it

situates neurodevelopmental knowledge in a 'universal' space without questioning

whether that knowledge exists in other contexts. This assumption masks the

difference in power/knowledge relations that produce inequality even though the

discourse is presumably about the absence of difference. When, in fact, the

Bhutanese do not have the same knowledge of tools for diagnosing ADHD or

resources like iPads, this difference becomes a deficit as though there is something wrong with the Bhutanese.

In addition, the assumption of sameness in knowledge ignores the experiences and cultural contexts of the audience members. For example, another doctor from the US 'expert team,' when explaining functions of different brain regions, moved quickly through her explanation by stating, "I'm sure you all know this" (Field Notes, 5 December 2012). Not once did she ask the Bhutanese audience members to explain how they conceptualized the brain according to Buddhist and Tibetan medicinal worldviews, nor did any Bhutanese audience member volunteer this information. When the Bhutanese audience members did get a chance to ask questions, one of the first questions they asked was for the American 'expert team' to tell them specific decibel level criteria for different stages of deafness in order to sharpen their diagnosis. This example suggests that, similar to the earlier example of dismissing 'natural remedies' in Bhutan by the lead doctor, 'modern' medicine is clearly detached from 'traditional' medicine and that 'modern' (Western) conceptualizations of the human body and 'normalcy' represent progress. Pigg (1995) argues that this is a necessary distinction to make for international development practitioners in that identifying 'traditional' as 'what came before' clears space for modern medicine to enter.

I should also be quick to point out that "othering" discourse and the displacement of knowledge is not only under the purview of the medical model. Discourses in the rights model can behave in similar ways. For example, a top

official in the Bhutanese Ministry of Education remarked at the Regional Seminar in

December 2013:

> There is an urgent need to coordinate. All of this [development in the education system] has been made possible by the generous support of our development partners. The biggest challenge we have is capacity constraints. We need a better understanding of challenges and opportunities, more linkages established, to build collaboration. (Field Notes, 3 December 2013)

The remarks of the official indicate a reliance on exogenous persons and organizations, situating Bhutan as lacking the capacity to facilitate educational reform and development on its own. Another presentation by a UNICEF official from the United States used 'development-speak' phrases such as "transformative agenda," "change agent," "systems framework," and "normative framework" that can have the effect to discursively distance Bhutan from the acceptable nomenclature of global discourse because these phrases are not easily localized within the Bhutanese context (i.e. Utting, 2006).

Within local contexts, individual exogenous 'experts' enter Bhutan with their own personal constructions of disability, definitions of terms, and degrees of awareness that there may be different ways of conceptualizing disability. For example, currently two organizations – along with UNICEF – are supporting the development of inclusive education for the Special Education Unit (SEU): the Bhutan Foundation (USA) and Queensland University of Technology (Australia). A top official at the Ministry of Education informed me he was receiving a lot of ideas from the two different organizations and was convinced that Australia was providing them an inclusive model for development and the US a "special education" model for development (Interview, 17 May 2013). This official was making a distinction

between the two, even though both the United States and Australia have similar

educational models and frameworks (Davies & Guppy, 1997; Mitchell, 2005). The

following is a sampling of the list of organizations that have, at one time or another,

been involved in developing education for youth with disabilities in Bhutan:

- UNICEF
- Bhutan Foundation (USA)
- Bhutan-Canada Foundation
- Omega Foundation (Finland)
- *Kwinnliga Missions Arbetare* [Woman's Mission of Sweden]
- *Christoffel Blindenmission* [Christian Blind Mission of German]
- Bhutan-German Friendship Association
- Save the Children
- Japanese International Cooperation Agency (JICA)
- Danish Association of the Blind
- Norwegian Agency for Development Cooperation (NORAD)
- Danish International Development Agency (DANIDA)
- Perkins Foundation International
- Pro Bhutan (Germany)

These agencies have been invited by, or collaborated with, the Royal Government.

However, all of these agencies represent very different perspectives, with different

definitions of terms like 'inclusion,''mainstreaming,' and 'integration' that have been

constructed through their organizational cultures located outside of Bhutan. Some

of the above agencies were more successful than others in convincing the Royal

Government and Bhutanese stakeholders to support their specific disability agenda,

which speaks to the personality and efficacy of the individual members of these

agencies and the success of the networks they created. For example, the Bhutan

Foundation is a significant factor in disability development in Bhutan, based partly

on the fact that the benefactor of the Bhutan Foundation has a relationship with the

Royal Family.

My argument throughout this section has been that the exogenous voices that enter Bhutan are multitudinal and disparate. The two dominant disability models that are entering Bhutan are the medical model and the rights model, but beyond those models there is a lot of confusion in the definition of terms, meanings, and ideas. In the next chapter, I will explain how disability is constructed locally in Bhutan through religion, culture, and the current structure of schooling and further build the argument that exogenous and endogenous constructions of disability are both dialectically linked and also, at many junctures, diametrically opposed.

Theoretical Considerations

In the sections above, an analysis of the policies of education for children with disabilities – specifically the National Policy on Special Educational Needs (NPSEN) – as well as an analysis of the discourse on disability in Bhutan, reveals that there is a great deal of shaping of both policy and discourse from exogenous sources. In Chapter Three, I reviewed the literature that theorizes the reasons and processes behind this transfer of educational policies and ideas. What is clear from the data above is that the individual level of analysis becomes the most important element in the case of Bhutan because the policies, discourses, and ideas are all shaped by certain key interpreters and influencers. The analysis of policy interpretation at the individual level seems to support the arguments of the global constructivists and contradict the world culture and world-systems theorists. However, the findings are a bit more nuanced than merely endorsing one theory/set of theories and rejecting

others. In this concluding section, I will compare the research findings to the theoretical considerations from Chapter Three.

From the outside looking in, one could easily conclude that a world culture analysis of the development of education in Bhutan could account for much of the similarities between Bhutan and the rest of the world. Meyer, Boli, Thomas, and Ramirez (1997) argue that a hypothetical island isolated from the world would immediately legitimize itself by creating institutions and 'looking like' a nation-state. This could apply to Bhutan in many cases, but not as a whole case. As Karma Phuntsho (2013) and Lyonpo Om Pradhan (2012) both persuasively suggest, Bhutan was not in a period of 'self-imposed' isolationism; rather, Bhutan was a vital regional player in South Asia, actively exchanging and importing regional ideas, and was only characterized as isolated in that the West had not 'discovered' it yet. This is to say that any modern nation-state and institution building that has occurred in Bhutan in the 20th and 21st centuries were not built on a blank slate. Bhutan has reacted more to regional political, economic, and social changes than it has to international ones. This supports Schriewer and Martinez's (2004) argument that policy borrowing has more to do with regional position and politics than with connections to the world polity. The historical development of education in Bhutan occurred through the influence of India and the Jesuit priests that resided in Northern India. While not being Indian-born, these Jesuits nevertheless were one step removed from their Euro-American roots. They were not sent to Bhutan from

Europe or North America but were invited to enter Bhutan by the *Druk Gyalpo*.[9] To

the point, conceptualizations of 'schooling' and its place in society were already

being shaped long before Bhutan's entry into global discourses and institutions.

World culture theorists recognize that linkages to global discourses and

institutions matter, and they use them to study the isomorphism of education as an

institution, but their analysis does not cite the personal engagement with these

global discourses. There is a correlation between the level of participation in

international treaties, initiatives, and discourses and the cosmopolitan appearance

of a nation-state (Boli & Thomas, 1997; Ramirez & Wotipka, 2001; Suarez, 2007). In

the case of Bhutan, many international human rights initiatives were cited at

different times in my research as being important influencers to individual

members. These references occurred numerous times in seminars and workshops.

For example, two prominent Bhutanese citizens – both with disabilities themselves

– respectively mentioned the Convention on the Rights of the Child, the Convention

on the Rights of Persons with Disabilities (CRPD), and quoted messages from the

International Day of Persons with Disabilities. These individuals also are both

outspoken advocates of disability rights in Bhutan. The NPSEN itself cites

documents like the CRPD as being part of the inspiration for the new policy (not to

mention that Bhutan has signed the CRPD and will, in all likelihood, ratify the CRPD

in the near future). The explicit mention of these initiatives would seem to strongly

support the world culture argument that human rights treaties and international

participation do have an effect on shaping and 'norming' policies within countries.

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[9] Father William Mackey, perhaps the most influential of the Jesuit priest-educators, eventually became a Bhutanese citizen – the only non-Bhutanese ever to be given that honor (Solverson, 1995).

For example, during an interview with a top educational official at the Ministry of Education, this official seemed to echo world culture theory when he mentioned, "Inclusive education seems to be the global norm" (Interview, 17 May 2013). Again, it is the local individual that is connecting him/herself to global ideas and discourses.

From the majority of my interviews I conclude that there is genuine belief that education for youth with disabilities is a good thing, a desirable thing, and the adoption of inclusive education principles – no matter their ultimate interpretation – is seen as being in the best interest of Bhutanese society. However, this does not mean that development strategies and policies like the NPSEN are realistic given the structural and financial realities within Bhutan. Rather, policies like the NPSEN are idealistic, which some may interpret as 'overly-ambitious' and others may read as 'policy mimicry' (Ganderton, 1996) which leads to decoupling (Meyer, Boli, Thomas & Ramirez, 1997).

Decoupling occurs when policy language fails to make an impact on policy interpretation and implementation. This was seen in my research at many occasions, as terms like 'inclusive education' are given different explanations with every person I interviewed. For example, the top education official that suggested Australia had more to offer in 'inclusive education' than the United States because the US was a 'special education' model. Both this official, and principals and teachers I interviewed, expressed an opinion that we should 'include' all children, but put children with moderate to severe disabilities in separate specialized facilities. This is also reflected in the NPSEN and, as I noted above, is not an uncommon

interpretation of 'inclusion' – especially in India (Bach, 2009; Bagley & Verma, 2008; Singal, 2006). Compared with the international discourse on inclusive education, this is not the intent of the term.[10]

These individual actors filter their interpretation of 'inclusion' through their own personal history, culture, context, and situation. It is relatively easier to advocate for a complete systems change and paradigm shift of inclusive education from exogenous positions – from a place where there is not much to lose. However, those actors that actually have to *implement* policy have personal concerns such as finances, job security, institutional cultural norms, institutional hierarchies, and relationships. These are all factors which shape policy that is not completely captured in macro-sociological theories such as world culture.

The short-coming of world culture theory to fully explain educational policy transfer ultimately comes down to its failure to look beyond the macro-level. The theory does succeed, I believe, in observing a pattern of nation-state policies that appear similar. Even Carney, Rappleye, and Silova (2012) acknowledge this observation before they submit a scathing critique of world culture theory. Many in comparative education actively question whether this isomorphic observation of policy discourse is real, or superficial (e.g. Anderson-Levitt, 2003; Carney, 2009; Carney, Rappleye & Silova, 2012; Steiner-Khamsi & Stolpe, 2006). I contend that it is both.

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[10] There is a wide variety of interpretations, even at the international level (see Ainscow, Booth & Dyson, 2006; Mitchell, 2005; Artiles, Kosleski & Waitoller, 2011 for discussions on this topic). However, these interpretations all contain similar philosophical outlooks that identify 'inclusive education' as meaning the education of all children in the same setting. See Chapter One for more elaboration on the international discourse.

Following Steiner-Khamsi (2010; & Stolpe, 2006), the case of Bhutan is a clear case of 'policy talk' and 'global speak.' From the world culture theoretical perspective, Bhutanese policies like the NPSEN are significantly aligned with international discourse around educational rights for students with disabilities. Indeed, the NPSEN itself acknowledges as much, just as policy actors whom I observed and interviewed frequently cited international discourse and initiatives as influencing their own thinking. However, this theoretical perspective can also be viewed through a different lens. Bhutanese policies can also be seen as superficial in the sense that their ultimate interpretation and implementation deviate – or, in other words, 'loosely coupled' – from the original international discourse. What international initiatives, treaties, and discourses ultimately serve is to standardize the language of educational policy, but not its contextual reality.

At issue, also, is the fact that international discourse is not monolithic. As the Hannerz (2002) quote in Chapter Three suggests, "As people move with their meanings, and as meanings find ways of traveling even when people stay put, territories cannot really contain cultures" (p. 8). Nation-states do not import and transfer discourses and policies wholesale from the international ether. Rather, the persons involved in the negotiation and reconciliation of old and new information becomes the most important element for consideration. This occurs at multiple levels, and involves everyone from the policy leader that pushes a personal agenda forward, to the school principal that studied in Australia, the teacher that studied in the United States, the American doctor that comes to Bhutan to share his opinion,

and the parent that sometimes goes to India. It is these personal networks and lived-experiences that most inform the 'referential web' (Vavrus, 2004).

Any analysis of the formation of Bhutanese educational policy and perspectives needs to acknowledge this 'referential web' (Vavrus, 2004) from which these were formed. In the case of Bhutan, the 'referential web' consists of voices that represent contradictory views on disability and society. As individuals bring ideas on disability that represent a medical model or a rights-based model, these contradictory models of disability become paradoxically linked as one and the same, and co-exist in the discourse and construction of disability as was indicated in this chapter. This is not to say that the contradictions of the medical model and the rights-based model do not exist in other places and discursive spaces. All over the world, these two conceptualizations of disability play out in discourse and policy (Armstrong & Barton, 1999). The World Health Organization and the World Bank (2011) have recently tried to reconcile disparate conceptualizations of disability into one model: the bio-psycho-social model. The effectiveness of this model has yet to be tested, and a unity in models is certainly not what Bhutan is experiencing.

It is important to recognize that the power/knowledge position of the actors whose exogenous ideas are publicized through workshops and policymaking meetings in how and why these ideas become realized nationally and locally. As discussed above, the perception of power and authority cultivated by the medical 'expert team' during the neurodevelopment workshop helped establish the importance and weight of their particular perspective on disability and disability's domain in society. It seems that the authority of the medical perspective has been

quite successful in shaping Bhutan's disability discourse, as many Bhutanese whom I interviewed expressed a desire for increased and better disability diagnoses. At the same time, these same Bhutanese actors – the Program Officer of Thimphu Special School, the Director of Bhutan Ability Center, the Special Education Director at Thimphu Public School, and others – are deeply influential within Bhutan in spreading disability awareness and empowerment using a more rights-based approach. Still, the power/knowledge/authority of 'modern' foreign doctors in Bhutanese society cannot be ignored, and their discursive influence is widespread.

The importance of individual actors in Bhutan, and the empowerment of Bhutanese actors in shaping their own imagined world,[11] put the case of Bhutan in strong opposition to world-systems theory. While world-systems theory may explain the phenomenon of educational policy transfer in certain post-colonial contexts, the position of Bhutan in the 21st century does not suggest that Bhutan can be considered a peripheral country because its economy is not directly linked to the 'core' economies – as imagined by world-systems theorists. Much of the Bhutanese economy is either self-contained or dependent upon India and Bangladesh. Foreign direct investment (FDI) is severely limited by law (Schuelka, 2013f). There is also an absence of strong policy imposition or coercion by international agencies as one would expect to find in peripheral countries. Dasho Sonam Kinga (2009) makes a strong case in support of this position:

> [T]he development partners have never used the leverage of their financial aid to force any socio-economic and political changes within Bhutan. Instead, all of them have constantly lauded the efficiency of the Bhutanese state to utilize aid and comparatively achieve far better results. Bhutan had been

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[11] See Ortner's (2001; 2006) 'Practice Theory' for further elaboration.

careful in opting for a sort of conditional aids that development partners could provide [sic]. Instead, development partners had made commitments to help Bhutan actualize her development philosophy of Gross National Happiness which identifies good governance (based on decentralization and democratization) among others, as a key principle. (p. 8)

In the archery-development allegory by Dasho Karma Ura (2004), explained at the beginning of this chapter, international aid represents the energy in the bow, but it is the archer that ultimately focuses the energy to shoot the arrow on or off target. It is the Royal Government that approaches others when it has something that it wants to accomplish.

The Bhutanese set the agenda, and then collaboratively work it out with funders and experts. In the Special Education Unit, needs are identified by the Bhutanese officials, and then brought to UNICEF and the Bhutan Foundation (Field Notes, 7 May 2013; 17 May 2013; 20 June 2013). As a top education official stated, this is because "when it comes to expertise, we don't know" (Interview, 17 May 2013). Officials at UNICEF-Bhutan also confirmed that the Special Education Unit, and the Ministry of Education, do the agenda-setting (Interview, 7 May 2013). While UNICEF does sometimes have specific issues they would like Bhutan to focus on – child-friendly schools, early childhood, gender parity, nutrition – they work with members of the Royal Government to figure out ways to collaborate in Bhutan's best interest (Interview, 7 May 2013). This is a precedent that has been established since the very beginning of educational development in Bhutan. It would be easy to second-guess organizations like UNICEF when they state that they are a collaborative partner, given that there is a general scholarly distrust in comparative education that these types of international organizations are benevolent (i.e. Apple,

2010; Carnoy, 1995; Dale, 1999; Klees, 2008; Mundy, 1998; Rizvi & Lingard, 2010;

Stromquist, 2002; Samoff, 2007; Vavrus, 2005). However one may view the

relationship between UNICEF and the Ministry of Education from the outside, both

organizations are adamant that their relationship is collaborative and that Bhutan

sets the agenda. Given my year in Bhutan, and my conversations with many

stakeholders, I can also attest to this. The discourse on disability in Bhutan may be

heavily influenced from exogenous initiatives and discourses, but it is not coerced.

One piece of evidence to support this is the fact that all policies, local initiatives, and

funding for any social program must pass through the Gross National Happiness

Commission before their implementation, thus controlling and 'Bhutanizing' the

message of these programs and policies (Interview, 8 May 2013). In another

example of how the Bhutanese negotiate the influence of exogenous ideas, a high-

ranking education official at the Regional Seminar in December 2013 remarked, "To

those of you that are visiting Bhutan for the first time, you are truly the experts, but I

hope that you will also recognize our Gross National Happiness in development"

(Field Notes, 3 December 2013).

This is not to say, however, that development organizations in Bhutan are not

vying for recognition and 'territory,' just as Steiner-Khamsi and Stolpe (2006) attest

in the case of Mongolia. In several observations and interactions, I found the

importance to have 'ownership' of a project and to not work collaboratively was

very present (Field Notes, 7 May 2013; 17 May 2013; 20 June 2013; 16 July 2013; 17

July 2013). The Ministry of Education does not act as a centralized organization in

this regard, and actively runs several inclusive and special education development

projects from different 'experts' – from different organizations and different countries – all at the same time, and without informing these organizations that they are working with others. This is mostly the cause of misinterpretation in terms and policies, such as the case between the misinterpretation of the Australian and American systems of education for youth with disabilities (Interview, 17 May 2013). This is not coercion on the part of the international development organizations but, rather, another example of the incongruity of development discourses when multiple sources and individuals are used.

The world-systems theoretical stance on the importance of nation-states in the world system (Wallerstein, 1983; 2004) also does not explain the case of Bhutan. While it is true that the Royal Government and the Ministry of Education are the primary sources for educational development in Bhutan, it cannot fully control the movement of people and ideas. As one educational bureaucrat remarked, "The Bhutanese have been very careful on what they have brought in. Before the digital age, there were limited choices. But now, the internet has brought so much choice" (Interview, 13 June 2013). The presence of the internet in Bhutan is enough to displace the nation-state as primary filter of global discourse, but the movement of peoples in and out of Bhutan has long been influential is shaping discourse more than the Royal Government alone. The Jesuit priests, the Bhutanese studying in Darjeeling, the handful of 'experts' like the American doctors, the Indian teachers in the early days of the school system – these are just a few instances in which the nation-state cannot completely control the flows and scapes of exogenous information and ideas (i.e. Appadurai, 1996). If anything, the nation-state of Bhutan

presents an outlier in the world-system analysis since it is not being placed into peripheral status by a powerful core capitalist system. In fact, quite the opposite is happening as many countries – in what Wallerstein (1976) would label the 'core' – are now squarely looking towards Bhutan for ideas on alternative development strategies like GNH, even gaining economist Jeffrey Sachs as an advocate for this alternative approach (Helliwell, Layard & Sachs, 2012).

At a macro and at a micro level, both world-systems and world culture fail to capture the realities of policy making, interpretation, and implementation. One of the central tenets that hold the Global Constructivist scholars together is their belief that it is at the school level that international discourses and policies ultimately become shaped and changed (Anderson-Levitt, 2003; Carney, 2008; Levinson & Holland, 2006; Sutton & Levinson, 2001). Shore and Wright (1997) argue, "Not only do policies codify social norms and values, and articulate fundamental organizing principles of society, they also contain implicit (and sometimes explicit) models of society" (p. 7). This is certainly the case with inclusive education policy, and it seeks to reimagine school in a different way. The inclusive education model of society is complicated by the fact that, wherever it travels, it encounters already existing histories and contexts (Alur & Timmons, 2009; Artiles, Kozleski & Waitoller, 2011; Mitchell, 2005). The next chapter will specifically explore these interactions between actors at multiple levels as they appropriate, interpret, and shape policy and discourse pertaining to the education of youth with disabilities.

CHAPTER FIVE: Constructing Disability in Bhutanese Education

Introduction

"One cannot be disabled alone," remind McDermott and Varenne (1995, p. 337). For many scholars in both anthropology and disability studies, the idea that 'culture' is disabling and that 'disability' itself is a constructed condition has become an accepted building block in developing disability theory and in an understanding of 'disability' in society and culture. McDermott and Varenne, however, elaborate upon this notion by suggesting that schools and the institution of education in society are major sources and locations of disability. For example, without literacy there would be no illiteracy; without tests there would be no failures; without a constructed sense of 'normal' there would be no 'abnormal.' Policy could also be considered a location of disability. As Shore and Wright (1997) suggest, policies can be read by anthropologists "as rhetorical and discursive formations that function to empower some people and silence others" (p. 7).

In the previous chapter, I discussed the transfer of educational policy and discourse in the case of Bhutan. The transfers and exchanges of ideas, born of another place and in another context, highlight that the very notion that disability is constructed within cultural and societal contexts. To put it succinctly, disability is constructed *differently* in dissimilar places and times. Not only that, but *education* is also constructed differently in dissimilar places and times. When these two ideas of disability and education collide with each other and then interact in other cultures

and spaces, there can be much tension and confusion as societies negotiate new

ideas and old ideas; new constructions and old constructions.

Underwood (2008)[12] provides an excellent framework in which to socio-

culturally analyze and understand disability that will inform this chapter. The levels

of analysis in this model are the following:

> *Individual Beliefs*
> The individual belief about the nature of barriers to learning is based in a pathological understanding of disability. Learning problems are perceived be a result of something being physically, emotionally, or intellectually wrong with the child. The difficulties faced by the child are not considered to be a symptom of their social interactions or the communities to which they belong. (p. 16)
>
> *Situational Beliefs*
> The situational belief about barriers to learning explains a child's difficulties as a function of the interactions with his or her immediate environment. This might include the attitudes of the people with whom the child interacts, or physical barriers, which create difficulties for a child with physical or sensory disabilities. The child's difficulties are not attributed to group attitudes or policy issues, not are they perceived to due to impairment. (p. 17)
>
> *Socio-Political Beliefs*
> The socio-political belief about barriers to learning situates the child's difficulties within their social and political community. That is to say a child's disability is not a function of his or her immediate environment but of the underlying values of the society, education system or educational policy. These values are symptomatic of systemic pressures such as power, economics and political will. (p. 18)

All of these levels of analysis will be included in my analysis of Bhutan, although the

individual beliefs level of analysis is very much akin to the medical model

(Underwood, 2008) discussed extensively in the previous chapter.

With this background in mind, the focus of this chapter is on how Bhutanese

schools construct disability through practice that has been informed by culture and

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[12] See also, Barnes, Mercer & Shakespeare, 1999 (cited in Underwood, 2008)

history. The first section explores how religious and cultural heritages have constructed disability in Bhutan, both historically and in the present, to better understand how schooling and education for persons with disabilities is being shaped endogenously by local actors, as well as realize the local context to which inclusive education policy and discourse is interacting. This section also touches upon both the situational beliefs and the socio-political beliefs levels of analysis in that disability in Bhutan is constructed through the attitudes and values in society. The next section is organized around four themes that emerged from my data analysis and show how Bhutanese schools 'disable': structural exclusion, curricular exclusion, pedagogical exclusion, and linguistic exclusion. These sections allude primarily to the socio-political beliefs level of analysis in that this analysis focuses on systemic structures in society and policy.

The Religious and Cultural Construction of 'Disability' in Bhutan

There is not *one* culture of the country of Bhutan. There are, in fact, significant variations in language, culture, religious practice and expression, dress, food, architecture, and way of life. This is all the more remarkable given that Bhutan is approximately the size of Switzerland and contains only around 600,000–800,000 inhabitants.[13]

There are two principal cultural movements happening in Bhutan at the moment. In one, there is an increasing amount of cultural homogenization. Perhaps the single biggest contributor to this is mass media. In one sense, media like radio

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[13] According to the 2005 Census (Office of the Census Commissioner, 2006), Bhutan had a population of 672,425. However, nearly 40,000 people are listed as 'floating,' which could imply undocumented migrant labor from India and Nepal.

(begun in 1973) and television (begun in 1999) are creating a unified Bhutanese

identity. Pommaret (2006) argues that the broadcast of regionally-specific *cham*

[religious dances] to the national audience helps to forge a shared national identity

as Bhutanese recognize and embrace the country's diversity as a national feature.

However, with most local media – print, radio, television, internet – in the languages

of English and Dzongkha, other languages of Bhutan are getting relegated to a

second-tier status. *Tshangla*, more commonly known as *Sarchop* [the language of the

East], is widely spoken as the primary language by many Bhutanese but is not

widely present in mass media. Also present in Bhutan is a feeling that mass media

has opened up the 'dangerous' door of globalization and corrupting traditional

Bhutanese culture through its outside influences and ideas (Karma Dorji, 2006;

Phuntsho Rapten, 2001).

The other cultural movement occurring in Bhutan is an increasing awareness

of Bhutan's multicultural history, although this sits uneasily in its present reality as

a homogenized nation-state. In 2013, a significant valorization of this cultural

diversity occurred through an international conference on 'Leveraging Cultural

Diversity' in Bhutan (Schuelka, 2013a). New Bhutanese histories, like Karma

Phuntsho's exhaustive *The History of Bhutan* (2013), emphasize the movement and

syncretization of peoples, religions, and cultures through and within Bhutan during

its long history. However, many Bhutanese scholars, are also quick to observe that

much of Bhutan was consolidated and centralized during the rule of Zhabdrung

Ngawang Namgyal in the 17th century (Ardussi, 2004; Karma Phuntsho, 2013;

Sonam Kinga, 2009), and began the dominance of the *Drukpa* [Tibetan-Buddhist

ethnic group from Western Bhutan] in religion and politics. In this way, the tension between the multicultural state and a shared national identity has existed in Bhutan for at least four hundred years.

This tension surrounding multiculturalism and national identity came to an apogee in the late 1980s and early 1990s. During this time, the porousness of the southern border with India was increasingly seen as a problem. Immigrants of Nepali origin – many who had been in Bhutan for generations – suddenly found themselves in a Bhutan trying to find its identity as a modern nation-state. There were also Assamese separatist groups that were taking advantage of the loose border controls to make camps on the Bhutanese side of the border, while conducting terrorist activities in Assam state to the south. The result of this tension is that the *Drukpa*-centered State began actively enforcing a nationalistic code of language, dress, and religion called *driglam namzhag* and tightened the control of the border while the *Lhotsampa* [ethnic Hindu-Nepalese; in Dzongkha, literally 'Southerners'] in the south became more militant about asserting their religious and cultural identity. Accounts differ as to what actually started first, the aggressiveness of the Nepalese or the nationalistic actions of the Bhutanese State. In short, thousands of people of Nepali origin were expelled and sent to refugee camps in what became Bhutan's first international crisis.

This history is important to understand in order to provide context in which to have a conversation about *difference* in Bhutanese society. The story of the 'Southern Problem,' as it is called in Bhutan, is spoken about in hushed conversations or not at all. When I had a student at Royal Thimphu College that

wanted to do her senior project studying the 'Southern Problem,' several Bhutanese faculty members tried to steer her away from it because of the controversy of the topic. As mentioned above, many Bhutanese are all too ready to have conversations about forging a shared identity and repelling the 'moral corruption' of the West, but most are quite reticent about having a conversation in regards to being a multicultural society where many ideas, opinions, and worldviews coalesce.

The conceptualization of 'disability' plays into this discourse on societal differences and is shaped by these cultural forces. Despite variation among ethnic groups in Bhutan, Buddhism does play a significant role in shaping the meta-culture of Bhutan. As Karma Phuntsho argues, "Buddhist teachings and practices play a fundamental role in Bhutanese life and, like nature, are dominant factors which shape the Bhutanese personality" (2013, Chapter 2, "The People"). There are two primary schools of Vajrayāna Buddhism in Bhutan – the *Nyingmapa* [old school] and the state-supported *Lho Drukpa Kagyu* [southern thunder-dragon school of oral transmission] – which, together account for 75% of Bhutanese who themselves as Buddhist (Central Intelligence Agency, 2013).

While religious scripture and doctrine can deviate dramatically through its cultural expression, certainly the origins of outward cultural manifestation have their roots in the dogmas and original texts. The *Dharma* [teachings, or 'path'] of Buddhism provides a contradictory message on conceptualizing disability, which I have written on previously (Schuelka, 2013b). In short, the belief in *karma*, in which the actions and merit of previous lives give consequence for the current life, identifies having a 'disability' as a consequence of past life transgressions. This is the

most common explanation for disability in Bhutan, which I will detail later in this section. However, Buddhism also supports compassionate thinking, and the interconnectedness of all sentient beings, which allows for one to treat kindly a person with a disability. The notion of social justice and action is fairly new in Buddhism, and sits uneasily next to a general mistrust that the presence of 'disability' is evidence of transgressions in the past lives of the individual (King, 2009).

There is no central text in Vajrayāna Buddhism, but there have been many writings and interpretations by revered religious authorities and reincarnations that are regarded as scripture. One of the most common religious books found in Bhutan is Patrul Rinpoche's *Words of My Perfect Teacher* (1999), which was originally transcribed in the 19th century. This is a foundational text of the *Nyingmapa* school, and contains the original ideas of Buddhism brought to Bhutan in the 8th century by Padmasambhava [literally 'lotus-born' but also known as the 'Second Buddha' and most commonly refered to in Bhutan as Guru Rinpoche].

Words of My Perfect Teacher does mention disability specifically, and it is here that one can begin to get a sense of how Buddhist conceptualizations of disability begin to shape Bhutanese conceptualizations as well. In Buddhism, the concept of 'freedom' means being able to practice Dharma. Consequently, the 'lack of freedom' means having no such opportunity. In *Words of My Perfect Teacher*, there are eight states in which there is no opportunity to practice Dharma (1999):

> Being born in the hells
> Being born as a *preta* [hungry ghost]
> Being born as an animal
> Long-lived gods (i.e. whose mental state is blank)

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Those born in border countries because the doctrines of the Buddha are
　　　unknown there (aka 'barbarians')
Those born as *tīrthikas* [adherent of non-Buddhist religion, implying 'wrong
　　　views']
Those born during a dark *kalpa* [period where there is no Buddha]
**"Those born mute or mentally deficient have no opportunity to practise
　　　the Dharma because their faculties are incomplete."**
　　　(emphasis added, p. 20)

The text goes on to explain that the teachings of the Buddha are incomprehensible

to a person born deaf and/or mute because they cannot understand language, and

"the process of listening to the teachings, expounding them, reflecting on them and

putting them into practice is impeded" (p. 21).

　　　Further in *Words of My Perfect Teacher*, there is another direct reference to

disability in constrast to someone who is fully able-bodied. There are five 'individual

advantages' to being able to properly practice Dharma, and these are:

Being born a human
Being born in a central place
Being born with all one's faculties
Not having a conflicting lifestyle
Having faith in the Dharma

Again, the text enforces that a 'completeness' of the physical and mental body is a

requirement to be a complete practicioner of Buddhism. This is further emphasized

in the text when it is stated, "Not to have all your sense faculties intact would be a

hindrance to the practice of Dharma. If you are free of such disabilities, you have the

advantage of possessing the sense faculties" (Patrul Rinpoche, 1999, p. 22).

　　　While Buddhism may not be as exclusionary today as the texts would imply,

there is still the notion of 'completeness' that is preferential. A Bhutanese scholar

whom I interviewed noted that Buddhist monastic practice still has a requirement

to inspect for disability. During one of the initial ceremonies to become a monk, a

full nude prostration happens in front of an Abbot to check to see that the human body is complete – especially that the sexual organs are complete – so that "the monk has the right vessel for Dharma" (Interview, 14 June 2013).

From my many interviews with authorities, teachers, scholars, etc., it is clear that disability in Bhutan reflects this cultural notion that 'things are perfect when they are complete,' and deviance from this standard represents a threat. According to a Bhutanese scholar, if a family is doing a *puja* [household ritual], a person with a disability is considered a "bad omen" and is not allowed inside the house (Interview, 14 June 2013). It was, and still is, common practice to exclude a person with a moderate to severe disability – e.g. cerebral palsy, intellectual disability, autism – from participating in household and agricultural tasks. This was an interesting finding, given that in other agricultural settings it has been found that the needs of the subsistence agricultural rural community *require* inclusion and participation from *all* of its members (Schuelka, 2013c). This is not to say that community exclusion is a *universal* experience for persons with disabilities. However, as Karma Phuntsho (2013) points out, there have been several historical examples of the people of Bhutan rejecting rulers because of a perceived disability.[14]

The most common explanation in Bhutan for the cause of disability is the belief in karma. However, parents of children with disabilities were far more likely to reject the karmic explanation in favor of a direct medical cause. The prevailing notion that past life action directly affects present life circumstance leads to a general level of mistrust and blame placed on the person with a disability. One

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[14] The son of Zhabrung Ngawang Namgyal, Jampal Dorji, suffered from 'karmic impurities' and was deemed unfit for rule; Nyerpa Longwa, *Dzongpön* [district governor] of Bumthang in the 17th century, was partially blind and rejected by the people

popular *Khenpo* [spiritual master] in Bhutan wrote an entire treatise on how the transgressions of past lives is a direct link to being born ugly and with disfigurement. He writes, "… if the soul is not accompanied with the merit of practicing restraint, the body will take shape of an ugly person. Therefore, in whatever physical form, good or bad, that one is born in the next life, its cause is in our own hands in this life" (Jangsem Tashi, 2010, p. 86). This passage highlights both the emphasis on 'completeness' as a condition for beauty, and also on the individual responsibility – and, ultimately, blame – that is placed on having a disability.

The other local discourses on the causes of disability, moving away from karma, pertain to the heavy alcohol consumption of the Bhutanese and also to the practice of *Sergamathang Kothkin* [cross-cousin marriage; literally, 'golden cousin' marriage]. *Chang* [grain alcohol] in Bhutan comes primarily from homemade sources mostly in the form of *ara* [distilled] or *bangchang* [soaked], although cheap commercial varieties of alcohol are becoming more available. Alcohol is deeply embedded in Bhutanese culture and is almost always a part of the household ritual of receiving guests. For example, when guests arrive at one's home, they are served *phebchang* [arrival drink], when they depart they are served *shruychang* [departure drink], then the host, now lonely, invites neighbors over for a *tongchang* [lonely drink], then will retire for the evening after a *zimchang* [sleeping drink]. The next day they will typically wake up with a *shengchang* [rising drink] (Kunzang Choden, 2008b). There are many more occasions when alcohol is consumed that are not listed here. In 21st century Bhutan, many are now beginning to question and

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research the large-scale and accepted societal practice of alcohol abuse (Chencho Dorji, 2004; Lham Dorji, 2012). My students told me that local knowledge dictates that a pregnant mother is encouraged to drink alcohol to ensure the health of the child and, similar to other cultures, a child is given small amounts of alcohol to lessen crying and to alleviate the pain of teething. While the exact number of fetal alcohol syndrome (FAS) cases in Bhutan is hard to come by, many of my interviewees mentioned this as a problem. The Director of Eastern Special School informed me that FAS is especially a problem in that part of the country (11 June 2013) and this has been supported in subsequent interviews with parents and school officials (21 March 2013; 17 May 2013). During the Special Olympics health forum event on 26 June 2013, one of the participants remarked, "It was said that the children of the East were dull because their parents drank alcohol." Anecdotally, Luitel, et al. (2013) found that alcohol consumption was at hazardous levels in the Bhutanese refugee population, although there are general mental health concerns around forced migration populations.

Sergamathang Kothkin [cross-cousin marriage] is mostly practiced in rural Bhutan and in certain parts of the South and East. It is a practice largely on the decline, not the least of which because of the medical risks associated with children of consanguineous marriages. Lham Dorji (2003) states, "Medical reasoning that close-kin marriage has [a] greater chance of producing physically and mentally defective children encourage people to shun blood marriages" (p. 36). However, Sergamathang Kothkin is still practiced in isolated rural communities. The presence of Seramathang Kothkin was discussed at the 2013 Conference on Leveraging

Cultural Diversity (Schuelka, 2013a), but the presenters argued that they did not see any "presence of deformity" as a result of this marriage practice. Nevertheless, *Sermathang Kothkin* is still perceived by many as causing disability.

The onus on the individual for having a disability can lead family or community members towards feelings of compassion and, often, sympathy. I encountered many disability discourses in Bhutan centered around disability as 'suffering' and of people 'feeling sorry' for a person with a disability. In Bhutan, this manifests itself as an inclination of parents of children with disabilities who want to protect their children and 'shield' them from the mistrust of other community members. Several teachers that I interviewed touched on this and said that this belief leads parents to, as they see it, severely pamper their children and not allow them any autonomy or to develop independent living skills. One Vice-Principal addressed this directly when she remarked that "parents are spoiling their children" (Interview, 17 July 2013). The word 'spoiling' came up many times in interviews with school personnel around the Thimphu area. For example, in the Prologue to this dissertation, the Special Educational Needs Coordinator at Thimphu Public School instructs the new student about the presence of students with disabilities at the school: "Don't spoil them" (Observation, 15 March 2013).

One of the other things that the Special Educational Needs Coordinator at Thimphu Public School implores during the new-student orientation is not to call students with disabilities names. The practices of name-calling and the naming of nicknames are extremely common, even though some teachers and school leaders are actively trying to eliminate this tradition. Often, nicknames emphasize physical

attributes of an individual that are different or stand out from others. These

nicknames can last an entire lifetime, especially if one remains in his/her home

community with the same community members, and often they can be quite

negative and embarrassing. Throughout my yearlong study, I kept a list of

expressions that people will shout at persons with disabilities as a way to examine

the prevalence of such labels and the attributes associated with them. The most

prevalent are as follows:[15]

> *Kukpa* ["dumb"]
> *Jadu* ["deaf"]
> *Lengo* ["dumb"]
> *Tschow* ["handicapped"]
> *Tsagay* ["stupid/simple"]
> *Tsagyem* ["dumb"]
> *Zhaw* ["blind"]
> "Pig disease" is the expression for epilepsy.[16]

The most common expression on this list was *tsagay* (pronounced "saw-gay").

Interestingly, this term is used both as a term of endearment and as a negative name

to call a person with a disability. Babies and young children are often called *tsagay,*

which, in that context, can loosely be translated as "my stupid little one." In a more

negative usage, and as it is commonly used with older children and adults, this same

term can loosely be translated as "retarded" and would elicit the same effect as it

would in the United States.

While teasing and highlighting difference is often done in a joking manner, it

can be quite emotionally damaging as many of the interviewees told me. One

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[15] These spellings are mostly phonetic and/or rely on informants supplying me with their spelling. As was noted in the introduction, spelling in Bhutan – especially in English – is not uniform. Also, not all of these terms are Dzongkha.

[16] On epilepsy, it should be noted that the Bhutanese in the rural areas believe that it is contagious and that eating pork causes epileptic events. If a Bhutanese person has epilepsy, it is believed that they should not eat meat.

respondent – a young adult with mild development disabilities, including a stutter –
told me that when he goes to the central bazaar in Thimphu he often gets "made fun
of" (Interview, 11 June 2013). Children will mimic his stutter and imitate his
movements. Another respondent – a young adult with intellectual disabilities –
informed me that he is harassed at the bus stop by community members because of
his disability (Interview, 2 April 2013).

These cultural constructions of disability – as a way of encountering
difference in Bhutanese society – such as name-calling and teasing are being
challenged through encounters with other disability constructions and discourses.
As noted in the previous chapter, the medical model of disability has now become
quite common and is being imported from international sources more than any
other way of thinking about disability in society. This has the effect of changing
people's perceptions as to the causes of disability away from the karmic explanation
and toward an explanation of disability using individual impairment

This tension between cultural and religious constructions of disability, the
medical model of disability, and the rights model of disability pertaining to the
'location' of disability in Bhutanese society also expresses itself in the school system.
Schools were generally not thought of as places for persons with disabilities.
However, with changes in government policy shaped by international disability
discourses, Bhutanese schools now have students with mild/severe disabilities.
This does not mean that students are being included in the ways one might expect
given the inclusive education policy. The existing structures of the Bhutanese school
system serve as barriers to the full realization of the inclusive education philosophy.

Structural exclusion is the first of the four themes that show how disability is being constructed in Bhutanese schools. In Chapter One I discussed the educational policies in Bhutan related to students with disabilities, and in Chapter Four I discussed how these policies have been shaped by both internal and external forces. In this section, I extend this conversation by exploring how the structural elements of schooling in Bhutan serve to create, reinforce, and maintain disability in Bhutanese society even though policy would suggest that these structures have changed significantly. The structure of schooling does not simply mean the physical structures but also in the educational system as a matter of practice and policy. This section discusses the socio-cultural elements embedded in the Bhutanese school system that exclude and 'disable.' I begin with a conversation about physical accessibility.

By default, Bhutan is an incredibly inaccessible place. Being situated entirely in the Himalaya, the lives of the Bhutanese are lived vertically. This is problematic for those persons with disabilities who live with certain mobility restrictions. To use a wheelchair in Bhutan is nearly impossible, not to mention impractical, unless one is in an urban area with paved streets and sidewalks. However, even sidewalks with ramps are too steep for comfortable use of a wheelchair. The result is that most persons with mobility issues in Bhutan either have to be carried up and down mountains or, more commonly, they are homebound.

Figure 1: A Public Sidewalk in Thimphu

The physical infrastructure of public buildings, including schools, is also woefully inadequate for the accessibility of a person with physical disabilities. While one of my primary research sites did have some ramps for wheelchair use, most other schools I visited could be accessed only by traversing steps or hills. In addition to the accessibility problems, the physical state of Bhutanese schools is more broadly problematic. For instance, nearly 41% of Bhutanese schools lack a sufficient water supply, 26% lack electricity, and 64% lack access to the internet (Ministry of Education [MoE], 2012a). Related to questions about accessibility, only 63% of Bhutanese public schools have access to a road (MoE, 2012a). This is important to note because one solution to accessibility issues is to provide transportation to students, but this is impossible without a road leading to the school. In addition, the access to schools by road is very uneven across the country:

in the urban Thimphu *dzongkhag* [district], road access is 98%, but in the rural and southern *dzongkhag* of Zhemgang, road access is a mere 40% (MoE, 2012a).

Inaccessibility to public spaces like schools and government offices is a critical element in the construction of disability in that it creates a physical barrier to inclusion that also has psychological effects on those excluded (Eleweke & Rodda, 2002). It has also been argued that physical inaccessibility has an economic impact both on the individual and for society at large because people cannot access public and private spaces to be economically productive (Metts, 2004). In sum, disability is constructed through exclusion from places deemed public and established for 'all' citizens. The physical structure of schools leading to the exclusion of children with disabilities reinforces the view that access to knowledge is reserved for those who are deemed 'complete'.

The physical access of schools is not the only structural form of exclusion. Overall quality issues in the Bhutanese educational system for all of its students lead to structural exclusion that is particularly felt by students with disabilities. One of the most important purveyors of educational quality is the personnel that make up the school.

There is very little in the way of specialists, classroom aides, or educational support staff in Bhutanese primary schools. As noted in Chapter One, there is no special education certificate so most teachers that work directly with students with disabilities have little specific training in the unique skills and techniques necessary to provide a quality education to a student with a moderate to severe disability. Without the presence of specialists and additional aides in the classroom, the

general classroom also has a difficult time being able to effectively differentiate instruction and meaningful include all students in lessons. This becomes an issue when the average student to teacher ratio I observed was about 40:1.[17] At Thimphu Public School, my observations were mostly conducted in Class I in the Fall of 2012 and then Class II in the Spring of 2013. In Class II, there were over 50 students on an average day, and 12 of these students had mild to moderate developmental disabilities. The following excerpt from my field notes describes a typical lesson and also indicates the kinds of issues facing both teachers and students with disabilities in putatively inclusive schools in Bhutan:

Class II, Period 4: Mathematics

Today the class is learning to do 'skip counting' (counting by twos, threes, fives, tens, etc.). There is a prompt on the board with numbers, but some numbers are missing:

3s = 3, 6, 9, □, □, □
2s = 2, □, 6, □, 10, □
5s = 5, 10, □, □, 25, □
10s = 10, □, □, □, 50, □, □, □, □, 100

The teacher instructs the class that they are to fill in the blanks, and helps them understand how we got from 3 to 6 to 9 by counting aloud and using fingers. The class is a bit rowdy today, and there is lots of talking. The students are very physical with each other, and they are constantly touching each other – arms around shoulders, poking backs, pulling ears, etc. There is a constant swell of movement in front of the teacher, and she does her best to try to hold it at bay.

Ngawang, a student whose Individualized Education Plan identifies as having "Mild MR [mental retardation] with delayed speech and language," is providing a constant distraction to the teacher and to the other students. He has a metal pencil case that he slides across his table with gusto, making a very loud scraping sound. When the teacher finally attends to the pencil case

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[17] The average student to teacher ratio, as reported by the Ministry of Education (2012a), is 22:1. I would suggest that the discrepancy is either due to the selection and sample of my research sites as being unrepresentative, or to the inaccurate statistics gathered by the Ministry of Education – either intentionally or unintentionally.

during the lesson, Ngawang takes his chair and begins moving around to other tables and trying to distract the other students. The teacher tries to ignore Ngawang for as long as she can, but eventually she has to divert from her lesson again and attend to Ngawang's behavior. When she leaves the students to work on the task on their own, the teacher walks around the room trying to help students either academically or behaviorly. During work time, the teacher becomes most focused on Ngawang and sits beside him for at least 10 minutes.

Meanwhile, the 49 other students are working on the problems in their notebooks, their heads looking up and down, scanning the board and going back to their papers. The students are very social and vocal when they work. Many sing to themselves out loud, and are talking to their neighbors. Every time the students are given a task to write in their notebooks it turns into group work. The other students with disabilities in the classroom, around 10 today, are semi-working on the task at hand. A few are actually working on the problems, especially with prompts from their tablemates. Most students with disabilities in the room do not understand what they are supposed to do, or how to do it, and just sit and draw in their notebooks. The teacher tries to get to them when she can, to try to guide and instruct them, but she is getting swamped with other students asking questions and the near constant behavioral issues of Ngawang. Trying to get the class's attention, the teacher uses a procedural prompt called "Lights! Camera! Action!" where the students are supposed to be quiet and listening when they shout "Action!" The students respond enthusiastically – actually, *too* enthusiastically and must go through the prompt several times. Some students are not finished with the first activity, but the teacher keeps the lesson going – especially for those students that have finished the first activity awhile ago and are now proving to be a distraction. She gives them a new task of skip-counting fours, sixes, and sevens, and the entire work-time chaotic ballet begins again. (Observation, 29 March 2013)

There are many examples of structural exclusion in this vignette, but I will highlight the workload and job expectations of the Class II teacher to show why Bhutanese teachers struggle to fully realize and implement inclusive education in their classrooms. On a daily basis, this teacher is responsible for monitoring the learning and understanding of 50 children. This is a herculean task under the best of circumstances, and this teacher appeared to do the best she could with a large class where nearly a quarter of the students had disabilities. Occasionally in Thimphu

Public School, I observed an aide that worked with the students with disabilities specifically, but she came into the classroom irregularly. In the last few months of field observations at this school, social workers from Bhutan Ability Center were going into the classrooms to help as well. However, they were not trained in education, let alone special education. The social workers at Bhutan Ability Center received mostly on-the-job physical therapy and behavior management training – from two Americans that volunteered at the center – and it is these kinds of services that they provided in the schools. I was asked to give several talks to the social workers on how to work as a special education paraprofessional.

At Thimphu Primary School, there is one primary special educator who received training in the United States. There are also six other teachers that teach special 'pull-out' classes in English, Maths, and Dzongkha, although these teachers are not trained in special education specifically. Most of the additional support and assistance that goes towards the 65 students with disabilities at Thimphu Primary School comes from volunteers. A parent or other family member of a child with severe disabilities needs to be at the school in order to assist the child with tasks such as toileting, eating, taking medication, and assisting in any behavioral issue. These family members sit outside the Special Education Unit building on the Thimphu Primary School campus throughout the entire school day – sacrificing their wages to support their child or family member in receiving an education. Often they converse with each other and the women weave, serving as an informal support group for parents with children with disabilities.

At Thimphu Special School, the staffing is even less adequate to the needs of the student population. There are 142 students at both the Thimphu Special School and its sister school, the Eastern Special School. These students are being serviced by a handful of parent volunteers and partly-paid adults with little to no training. Thimphu Special School operates as a vocational training center and special school, with little observed curricular or organizational structure to the student's day. Most of the work of the students is centered around vocational projects such as making wallets, bags, wooden carvings, and paintings. The lack of adequate and quality staff at Thimphu Special School led to several uncomfortable situations as an observer where children at the school were being physically violent with each other and there were no adults around to stop it. The question, in my mind, was whether or not I should intervene in that situation. Sometimes I would intervene when I felt like there was a severe risk to a student's health. The following is an excerpt from one of my first observations at Thimphu Special School (Field Notes, 28 August 2013):

> *Lunch Time*
> - Unstructured
> - Students everywhere, wandering, unsupervised
> - Some groups of students policing others, monitoring for behavior issues and any students not being safe
> - Two students in fight, no adults present, some monitoring by other students, some intervention; most are hitting the fighting students to discipline them

At another observation at Thimphu Special School, I noted the following:

> In the classroom there are 6 students (with moderate to severe disabilities), 1 parent-teacher (volunteer), and one volunteer from a local college. The students are given a coloring task, although with no clear curricular goal observed. One student – who has severe autism – is not doing the task and is wandering around the classroom and disrupting other students. The parent-teacher and the volunteer hit this student with pieces of bamboo, trying to get him to behave. Several times, they threaten to hit this student in the face.

Finally they take this student out of the classroom and isolate him in an adjacent room; unsupervised in the woodshop filled with machinery and saws.

The parent-teacher leaves the classroom unannounced and does not return. Meanwhile, the students grow bored with coloring and their behavior begins to spiral downward. They begin pulling things off the shelves and throwing colored pencils around the room. The volunteer chases after students, trying to guide their behavior after-the-fact, using the bamboo stick to hit students when she feels it is necessary.

The students mimic the actions of the adults, using physical punishment on each other and against the adults themselves.

Eventually, the student with severe autism is let back into the classroom, but is tied to a chair so that he cannot cause trouble. (Field Notes, 10 September 2013)

That same day in another classroom:

In this classroom there are 8 students (with moderate to severe disabilities). There is no teacher for a long while. There is a strong smell of urine in the classroom, but the source is unknown.

The teacher eventually turns up. Their teacher has vision impairment. He drills them on multiplication facts, going from student to student and demanding "7 x 4." No one knew the answer. Eventually, the teacher grows frustrated and tells them that it is "28" and moves on without checking for understanding or telling them how to solve the math problem.

Students are hitting each other, but the teacher cannot see them. No students intervene.

The teacher is called out of the classroom, and some students continue to study, but not very assiduously. Mostly, the students are trying to memorize the multiplication table. The teacher does not return to the classroom for the rest of the day, nearly one hour before the end of the school day, and the students are left on their own with no adult supervision. (Field Notes, 10 September 2013)

As an observer in these situations, it was hard to remain objective as I found the

conditions at Thimphu Special School to be uncomfortable coming from my own

background in the American education system. At times I did intervene, but I

frequently did not and reminded myself that there were many factors in Bhutanese society that made Thimphu Special School the way it was that could not changed by intervening every time I was uncomfortable. As I made more and more observations throughout 2012 and 2013, I came to understand that many Bhutanese schools look and feel like Thimphu Special School; these disciplinary practices (and their absence) were not specific to this school and to this student population. What makes Thimphu Special School unique was that it served a student population composed of students with moderate to severe disabilities, which typically necessitates increased staff and structure.

The situation at the private Inclusive Thimphu School was better in terms of staff quality, and the school was more academically rigorous and focused. However, the teachers struggled with including students with disabilities while still maintaining this focus on the learning objectives and outcomes for the entire class. The Principal of Inclusive Thimphu School confided that she was "a little worried at first to take students with disabilities, but then we were up for the challenge" (Interview, 21 May 2013). She continued that re-training teachers and convincing parents of the continued quality of the school was, and is, an on-going issue. The stakes are higher being a private school, because parents have options in terms of where they want to send their kids. Being 'up for the challenge' meant that the school needed to invest quite a bit of time and energy not only into training teachers, but re-thinking their educational philosophy. The following observation from Inclusive Thimphu School accentuates these challenges:

Class II Math

There is 1 teacher and 16 students in this small classroom. One of the students is identified as having a learning disability. The students were given instructions on a task before I entered the classroom, so now they are at work filling in their workbooks. The teacher is moving around the room, helping students with questions and monitoring their progress.

The student with a disability is working in a different workbook than everyone else. It is a workbook from a grade-level below the rest of her peers. One of her classmates is helping her while also trying to do their own work in the upper workbook. During work time, students collaborate together and give each other the answers and they figure them out.

The teacher has difficulty getting students attention, but once she does she more thoroughly explains a question in the workbook that most students did not understand. While the teacher instructs the class, the student with a disability is distracted with a crayon box and with other students. The teacher finishes explain the misunderstood question and send the class back to work.

During the second work time, the student with a disability goes to her backpack to get another book. She has gotten her English workbook to work on instead of math. The teacher takes a minute to talk to me about this student, "It is difficult to teach her. She is a self-starter, but never doing what the class is doing. Her behavior is good, but distracting sometimes." As the teacher is explaining this, the student with a disability is filling in the English workbook with her own words – not following any of the prompts in the workbook. Today, I am accompanied in my observation by an American speech-language pathologist. She works with the student with a disability one-on-one in the back of the classroom for awhile, and prompts the student to get the right answers in the English workbook. However, the student cannot get that kind of tutorial everyday. (Field Notes, 21 May 2013)

Both of these examples from Thimphu Special School and Inclusive Thimphu School identify one of the primary findings from my research: the lack of professionalization in special education services (see also Schuelka, 2013d). Many inclusive education scholars suggest that the primary factor in influencing educational quality is special education personnel training that is locally relevant to

the needs of the school system (Abosi & Koay, 2008; Eleweke & Rodda, 2002; Johnstone & Chapman, 2009).

The Bhutanese education system is trying to make itself more locally relevant and raise educational quality through increased teacher qualifications. Currently, just over half of the teachers in Bhutan have a bachelor's degree in education or above (MoE, 2012a). There is still a small percentage of teachers (3%) with only a Class X or XII education that were matriculated into the new standards. Thirty-three percent of the teachers in Bhutan only have a teaching certificate, which requires one additional year of coursework after Class X. The certificate is no longer offered in favor of the bachelor's degree of education. Out of the 10,300 teachers in Bhutan, 600 (8%) are non-Bhutanese. This is a notable change from the beginning of the mass education program when nearly 100% of teachers were non-Bhutanese and even since 2002, when 22% of the teachers were non-Bhutanese (MoE, 2012a). This is important not just in the development of local educational practice in Bhutan, but also in terms of the control of educational quality because it gives the Bhutanese education system greater say over the training that its teachers receives.

Without appropriate services delivered by well-trained special education and inclusive education teachers, schools in Bhutan are structured in such a manner that excludes a great many students. Physical disabilities are constructed through the inability to access the school, thus limiting access to educational space in which formal knowledge is transmitted. Learning disabilities are constructed through the limitations of the teachers to reach the individual both through class-size and

through training. In the observation from Thimphu Public School, it is clear that the Class II teacher cannot differentiate the lesson 50 different ways, nor can she take much time to check for understanding of more than a handful of students. The observations from Thimphu Special School identify that a lack in training and adequate staffing levels can lead to less-than-desirable behaviors from the teachers. While at Inclusive Thimphu School the student:teacher ratio was better, and the training level higher, the teacher still expressed difficulty in how to properly and meaningfully include her student with a disability into the rest of the class.

Schooling in Bhutan can be successful for *some* students, but only for those students that the schools are structurally set up to benefit. All other students who struggle with learning, or are not fluent in English and Dzongkha, or even have trouble accessing the school buildings, are 'disabled' by structural exclusion. Education in Bhutan is now formalized and institutional, perpetuating deep divides in the construction of 'ability' and 'disability' by strongly linking school and society, meaning that the outcomes/success of schooling for a student are connected with the outcomes/success of that student in society. In other words, the structure of school reflects the structure of society. As McDermott (1993, pp. 272-273) argues,

> In allowing schools to become the site of sorting for recruitment into the wider social structure, we may have gone too far for the collective good. We may have made it necessary to invent occasions – millions of them – to make learning disabilities institutionally and unnecessarily consequential.

The structural elements of exclusion of physical access and teacher quality are just a vehicle for the primary activity in education – the curriculum – and it is this structural element to which I will turn next.

Curricular Exclusion in Bhutanese Education

In the first theme of school-related disability construction, a set of structural

elements were found to disable children in Bhutanese schools. These included the

physical accessibility of school buildings, the lack of specialized support, and the

lack of professionalization in special education, which, ultimately, leads to issues in

school quality. The second theme illustrates how the curriculum and organization of

Bhutanese education constructs disability. Specifically, I will focus on the

centralized control of educational curriculum, the role of high-stakes examinations,

the curricular materials themselves, and the making and location of knowledge in

the Bhutanese curriculum.

The control and implementation of education curriculum in Bhutan comes

from the Ministry of Education. This can be helpful in many ways to standardize and

maintain educational practice and quality, but it can also lead to inflexibility and

bureaucracy in the face of locally specific issues (Weiler, 1990). In the case of

students with disabilities, the centralization of curriculum means that there is little

that a teacher or a school can do in adapting that curriculum to the meet the

individual needs of their learners. This might not be an issue if the curriculum

adheres to the practices of *universal design*[18] for the accessibility of all learners

(Rose & Meyer, 2006). However, this is a fairly nascent movement in curriculum

design, and most education systems around the world try to 'retro-fit' their

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[18] The definition of universal design for learning (UDL) is defined as "an approach to designing instructional materials that are flexible enough from the outset to accommodate learning differences. UDL emphasizes teachers as coaches or guides … learning as a process … cooperative learning … and reciprocal teaching for literacy. UDL is also a way to differentiate instruction. In these approaches, teachers support learning rather than impart knowledge; students construct knowledge rather than passively receive it" (Rose & Meyer, 2006, p. 2).

standardized curriculum to fit the individual needs of students with disabilities

(Udvari-Solner, Villa & Thousand, 2005). In Bhutan, this centralization and

standardization of the curriculum causes problems in that the teachers feel that

there is little flexibility for them to adapt material for their students.

In all schools I visited, the curriculum for students with disabilities was the

same as the general education students, with the exception that students with

disabilities were learning from a lower-grade curriculum. For example, at Thimphu

Public School, students with learning disabilities in one English pull-out class were

receiving lessons from a Class I curriculum, but they were in Classes XII and XIII.

The Class I curriculum consists mostly of picture books and workbooks filled with

animals, children, and games. Teachers at Thimphu Public School shared that they

did not feel comfortable using other materials because either they did not have

access to them, or because they felt that they needed to follow the government

curriculum (Field Notes, 8 October 2012; 29 March 2013). In the case of the

students in Class XII and XIII, they had received the *same* lesson from the *same* book

since Class I, with little advancement to show from it. Teachers at Thimphu Public

School felt that they could not move them on in the curriculum if they had not at

least partially mastered it (Field Notes, 8 November 2012; 29 March 2013).

Unexpectedly, I found little stigma around using non-age-appropriate

materials – given that one of the main criteria for the development of inclusive

schooling is age-appropriate materials and learning alongside same-aged peers

(Giangreco, 1997). When I interviewed students about this – both those with

disabilities and those without – they informed me that that it was no problem that

someone was using a different reader or were learning different materials. "It's okay, Sir," said one informant, Class IV, "because we are all at the level that we can learn" (Interview, 17 May 2013). At Mountain Village School, I interviewed two students in Class IV – one that was 15 years old, and another that was around 18 years old (age somewhat unclear). Both students were identified by the Principal and the teachers as 'having disabilities,' but they had never been formally diagnosed. The 15 year-old blamed herself for remaining in Class IV, and said that she "didn't put enough effort in to pass the classes" (Interview, 17 July 2013). Both students indicated that they had friends in Class IV and were not teased too much because of it – which was interesting given the prevalence of name calling and teasing that I had encountered elsewhere.

One reason that would suggest that there is little stigma around being of a different age than other classmates is that it is quite common in Bhutanese schools. In Figure 2, (MoE, 2012a, p. 102), the proportion of students that are "right age" for their class is given alongside those that are "underage" and those that are "overage."

Figure 2: Right age, Underage, and Overage Details by Class 2012

	PP	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
Right Age	51.6%	42.5%	35.9%	30.6%	26.3%	23.7%	22.3%	19.5%	20.0%	18.9%	19.2%	21.9%	19.0%
Underage	7.7%	11.7%	13.6%	12.4%	10.4%	9.6%	8.8%	8.0%	7.1%	6.4%	6.5%	8.0%	7.1%
Overage	40.7%	45.8%	50.5%	57.0%	63.3%	66.7%	68.9%	72.5%	72.9%	74.7%	74.3%	70.1%	73.9%

The above figure highlights that very few students in Bhutanese classrooms are of the "right age" for the assigned age group of the class. Thus, it becomes readily apparent that age and educational development are not highly correlated in Bhutan.

In this way, a 21 year old reading about "Momo the Monkey" in a pre-primary picture book may not think anything is wrong with that scenario. Knowledge is built sequentially and exists independently from age appropriate development.

The construction of knowledge is important to consider when exploring how high-stakes testing factors into the Bhutanese curriculum. As was discussed in the history and development of the Bhutanese education system in Chapter One, the Bhutanese educational system was based on the Indian educational model. Memorization, rote learning, and testing are the primary tools for learning in such a model. In another research article, I argued that educational testing narrows the curriculum and bends it towards what can and is tested. This can exclude and construct disability in that a narrow curriculum focused on content like math and language do not capture all of the non-formal learning and social development that is such an important factor in schooling for children with disabilities (Schuelka, 2013e).

Testing is a strong component of Bhutanese educational culture and, until 2006, all of the educational testing in Bhutan was conducted by the Council for the Indian School Certificate Examinations (CISCE) in New Delhi (Department of Curriculum, Research, and Development [DCRD], 2013). At every class level, students are administered an end-of-the-year exam that determines whether or not the student will advance into the next grade. This is a stressful time of year for the students, and involves *all* students from pre-primary to Class XII. In Class VIII, all students must take the Lower Secondary School Certificate Examination (LSSCE). At the end of Basic Education, or Class X, students take a high-stakes test called the

Bhutan Certificate of Secondary Education Examination (BCSE)[19]. This determines

whether or not the student will be allowed to attend Classes XI–XII, and whether or

not they will be government supported. While about 97% of the students that sit for

the BCSE pass the exam, only 40% of the top students are offered the chance to

attend government higher secondary schools. Another 31% of the students that pass

the BCSE go to private Higher Secondary schools (MoE, 2012a). After Class XII,

students again take a high-stakes examination – the Bhutan Higher Secondary

Education Certificate (BHSEC) – for the chance to enter tertiary education. The

BHSEC only has an 86% pass rate and there are only a limited number of

placements for government scholarships either to study abroad or to attend colleges

in the Royal University of Bhutan.[20] Placement is based on the BHSEC score.

At every step of way in this educational testing game, there is an opportunity

to cull students and separate them based on academic performance (Schuelka,

2013d). There are virtually no accommodations available on these tests. Testing

conditions are strict and taken very seriously, as I found out when I one of my duties

as a faculty member at Royal Thimphu College was to 'invigilate' final exams. The

final exams at the college involved verified examination booklets with multiple

signatures and an official college stamp, increased security to check students for crib

sheets, locked doors, assigned seats, and little flexibility in the exhaustive rules and

regulations placed on both students and teachers. Teachers invigilating exams were

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[19] Admittedly, there is some confusion on my part as to the definition of the acronym, BCSE. In Ministry of Education documents, this is defined as the Bhutan Certificate for Secondary Education (MoE, 2012a). However, in many other instances, I have seen this acronym being defined as the Bhutan Civil Service Examination – which, obviously, is a different exam. It could be that both are correct, which is all the more confusing.

[20] A note about these statistics: Very few students sit for these exams that believe that they will not pass. This is one reason why the pass rates are so high. Also, a student may only sit for exams if they have attendance of over 90%. It should also be noted that, in Bhutan, a passing mark on an exam is only 40% and the students only need to pass 4 out of 6 subject tests (DCRD, 2013).

not allowed to read or grade their own exams during the testing period; instead, teachers were required to remain vigilant of student cheating. It was hard to determine if all of these rules and regulations were put into place because of rampant student cheating, or if student cheating was a result of the atmosphere of such a strict environment. Students may have been inclined towards cheating because they have been trained through the primary and secondary school system that examinations were all-or-nothing, zero-sum propositions. This stressful environment of Bhutanese testing sends a clear signal to students with disabilities: *you are not welcome here*.

If educational testing is strong exclusionary factor in the structure of Bhutanese education, the content of the curriculum presents a barrier to learning as well. The Bhutanese curriculum underwent a 'Bhutanization' in the 1980s and 1990s that pulled the content away from the Indian-based curriculum and made it more locally relevant (Singye Namgyel, 2011). However, the quality of the materials still remains an issue. In one of the classrooms at Thimphu Public School, the workbooks they were using had not been updated since 1990. Another classroom was using a workbook that was printed in 1982, and developed by David Horsburgh, a British educationalist who worked in India. Not only has there been a lot of changes in the world and in understanding child development – even within Bhutan – since the 1980s, but the errors that were present in these early editions were never fixed. Besides numerous spelling errors and ambiguous instructions with little context, the workbooks, in some cases, contains English being taught incorrectly. For example, in the *Class I English Workbook B,* the example at the top of

the page has a picture of one bean, and then a picture of several beans. The example

reads, "This is a bean" and then under the group of beans, "These are bean." Another

page instructs the students, "Look for seven animals word" while another instructs,

"Deep your finger in green colour and colour the grapes." On another page, the

students are asked to "Look, read, and match" where the words do not correspond

at all with the pictures. As another example of ambiguous instructions, another page

features fill-in-the-blanks with little guidance as to what the correct answer might

be. All of these examples can be seen in Appendix G.

Most teachers I observed struggled with English to some degree, even though

English is supposed to be the medium of instruction in Bhutanese schools. Teachers

gave their instructions and lessons in English, but then during work time they would

bounce back and forth between Dzongkha, Nepali, and/or Sarchop, if not another of

the 20 languages that are used in Bhutan. The challenges of language in Bhutan will

be discussed in a later section of this chapter.

The flow of most classes I observed was the same: the teacher writes

something on the board; the students copy from the board; they write more

examples in their notebooks. For example, the following is an observation I made at

Thimphu Public School:

EVS [Environmental Science], Class I

The teacher holds up a flower [*metho*, in Dzongkha] and several other
different kinds of plants (tomato [*^lam bendha*], chili [*ema*], betel [*paney*],
etc.), lecturing about the differences between flowers and other plants. She
employs a call-and-response method during the lecture, where she asks a
question and the students respond in unison. As I look around the room, not
all students are responding to the group questions, but the absence of their
voices is not felt in the volume of the students that are literally shouting the

answers. The teacher is unable to discern if all students are participating just from volume alone.

The teacher draws a chart on the chalkboard of flowering and non-flowering plants, taping several of the items [plants] that she has collected to the chart. She then instructs the students to draw this chart in their notebooks.

The students take to the task, and begin working together to make their charts, copying each other at their tables of 6–7 students. The students with disabilities are mostly integrated and spread out in the classroom. I comment on this to the teacher during work time, and the teacher informs me that mixed-ability grouping works well because the students with disabilities can copy from other students to get the right answers. (Field Notes, 4 October 2012)

What this teacher demonstrates is that the pedagogical technique of call-and-response and mimicry fail to meaningful involve all students and make it so that the teacher is unable to accurately assess student learning during a lesson. Some teachers were trying to stretch the curriculum and their pedagogical techniques. For instance, the same Class I teacher from the above example also used things like semantic mapping of a story (Field Notes, 17 May 2013) and kinesthetic activities to teach ordinal numbers (Field Notes, 15 March 2013). However, most Bhutanese teachers I observed tended to follow the curriculum with fidelity and relied heavily upon whatever curricular materials are given to them by the Ministry of Education.

While I will address the pedagogical implications of this below, in terms of curriculum it is important to understand that without strong teaching, the textbooks and other materials are the access point to education in Bhutanese schools. Out-dated and error-filled texts are one more dent in the overall quality of Bhutanese education that serves to 'disable' children.

As it has already been seen, the structural and curricular elements of Bhutanese education go far in disabling students and constructing disability. In the structural exclusion section, teachers were mentioned in that they were overwhelmed by the student to teacher ratio and undertrained to handle heterogeneity in the classroom. In the last section on curricular exclusion, teachers were also mentioned in that they have little autonomy and little training to adapt centralized curriculum. The third theme in the construction of disability in Bhutanese schools will focus primarily on teachers in the *manner* in which they teach the curriculum and are members of the overall structure of the educational system. Connecting teaching practice with curricular control and content, Fuller (1991) appropriately states:

> Educational tools invented by the state often reinforce the social rules and form of classroom management enacted by the teacher. Throughout Africa, for example, lessons involve frequent oral recitation of vocabulary or arithmetic exercises, delivered in unison by all pupils. This mechanical process, set by the curricula or teacher guide, helps control and engage the fifty to ninety restless pupils that commonly sit before the teacher. Thus curricular content helps signal and legitimate certain forms of authority and human interaction that come to be seen as normal in modern (hierarchical) organization. (p. 68)

The pedagogical approaches employed by teachers, as encouraged by the culture and structure of the overall education system, is an important factor in the construction of disabilities in the Bhutanese classroom.

The first element of pedagogical exclusion present in Bhutanese schools is the presence of physical and psychological punishment used by teachers. For example, at Thimphu Special School, I observed the following typical lesson:

The students sit outside on the porch, most of them on the floor. This group of students are from the 'Advanced' grouping of students, but the group is a composite of all kinds of different disabilities. Some students are deaf, some have mild to moderate intellectual disabilities, some cerebral palsy, some others have unknown diagnoses. There are several adults present – volunteers mostly – but there is one main teacher at the end of the porch.

The lesson today is on sign language, which all students learn at Thimphu Special School, regardless of their hearing level. The teacher gives one prompt, the sign for 'bottle,' followed by a group response. The sign language used in Bhutan is a mix of English and Dzongkha that was developed by UNICEF and the Paro Deaf Education Unit. The lesson goes in the following manner: the teacher gives a sign, spells out the word, gives the sign-word, and the students repeat. This happens over and over again, and focuses entirely on vocabulary words.

One student is getting bored and has stopped paying attention. The teacher hits the student with a book to get him to pay attention. This student is then made to stand and demonstrate the lesson as a punishment for his inattentiveness. The student struggles with the signs, having a scared 'deer in the headlights' look across his face. The adults and other students laugh at the standing student for his mistakes, and eventually he sits down, embarrassed and ashamed.

Another student is asked to stand, and this student also struggles to demonstrate the lesson. The teacher chastises the students, makes fun of her, and talks about the student's abilities to the other adults present (including myself). The students with hearing impairment, those that are fairly fluent in sign, are pretty bored in the back of the student group. The standing up, the struggling, the chastisement, and the fear and shame repeat itself over and over again.

Meanwhile, when one student is standing up, the other students do not pay attention at all. The teacher is only quizzing the standing student, and the other students do not feel that they need to pay attention. The focus of the lesson is *only* between the teacher and the standing student. (Field Notes, 28 August 2012)

Scenes such as this – where the teacher hit children or shamed them – played out

over and over again in most schools that I visited.

In 2008, the Ministry of Education decreed that corporal punishment would

no longer be tolerated in Bhutanese schools (MoE, 2008). While this may have been

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a positive development in the progressiveness of Bhutanese schools, unfortunately teachers were not trained in any other classroom management techniques to help them maintain decorum and discipline without the use of force (Norbu Wangchuck, 2009, 29 August; Sonam Tenzin, 2006). Many teachers I interviewed were exasperated by their diminished authoritative role in the classroom, and they were desperate for new techniques that could help with their classroom management. For example, a teacher at Inclusive Thimphu School told me, "the will is there, but we are severely lacking in techniques and expertise [in classroom management]" (Interview, 21 May 2013). In fact, as part of my participant-observer role, I gave several workshops to teachers at Thimphu Public School and Inclusive Thimphu School on classroom and behavior management. During those workshops, I explained the techniques of firmly establishing rules and expectations, being consistent in feedback and discipline, and teaching desired behaviors rather than reacting to undesired behaviors. The teachers were very enthuastic to learn and apply these techniques, as evidenced by the lengthy question and discussion sessions that followed these presentations (Field Notes, 11 April 2013; 12 April 2013). The lack of discipline in Bhutanese schools is a societal concern, echoed frequently in media discourse and frequently referred to as the 'youth problem' (Lham Dorji, 2009; Sonam Kinga, 2005). However, on the other side, the Bhutanese populace has been appalled by recent cases of teacher abuse such as shaving the heads of bad students and injecting misbehaving students with air from a syringe.[21]

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[21] This incident was especially troubling and potentially lethal to the students both because air bubbles in the blood can travel to the brain, and also that the teacher was using the same syringe on multiple students. Public outcry about this case was also centered around the fact that the offending teacher was allowed to teach while being investigated and then was merely put on suspension by educational authorities (Tanden Zangmo, 2012, 17 October).

Despite the policy decree, corporal punishment is still rampant in Bhutanese schools and identified as a major factor in problems of retention (MoE, 2009; Sonam Tenzin, 2006). An educational administrator told me the number one question that he receives from parents about his institution, rather than the quality of the instructors or the progressiveness of the teaching, was about "how strict are we with our rules and discipline" (Interview, 12 September 2013). There is still a strong perception, regardless of the extreme cases, that schools *should* be a harsh environment and that knowledge can only be 'won' through hard work, determination, and endurance. In interviewing teachers about corporal punishment, Sonam Tenzin (2006) concludes:

> I came to believe that corporal punishment may never be totally banned from Bhutanese schools, firstly because of the culture, secondly, because of the large number of students resulting in poor classroom management, and lastly, because it has become a culture in many schools. (p. 11)

Sonam Tenzin also interviewed many students for his research on corporal punishment and found them receptive to it as a pedagogical technique. In my own research, students I interviewed echoed this sentiment. For example, at Mountain Village School, I asked a focus group of children about discipline. They indicated that they liked having a Western teacher (from Australia, through the Bhutan Canada Foundation) because he did not hit them. However, they also had this to say:[22]

> Matt: If the school isn't strict, does that still make it a good school?
> Students (in unison): Yes Sir.
> Student 1: Maybe they can focus more on their studies.
> Student 2: If teacher beats student, then they will be sad.
> Matt: Does that ever happen at this school, that the teacher beats students?
> [some indistinguishable chatter]…

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[22] Note that at many instances in this interview, students spoke in unison or talked all at once, mimicking their classroom experience. I have tried to clean up the script a bit, but there still may be some discrepancies.

Student 3: Yes, many teachers before would hit, Sir.

Matt: With a hand or a stick?

Students: Yes

Matt: With both?

Student 3: Yes, but the government makes the rule not to beat student. Now teachers are thinking about new punishment. Making students stand for long time at assembly and pulling ears. Making students stand outside for one hour.

Matt: Do you think that's good? That teachers are that strict?

Students: Yes Sir.

Matt: Why?

Student 1: It is good that student thinks that if they do naughty that teacher will punish them. They will do good work Sir.

Student 2: If the teacher not punish them, they will continue to be naughty.

…

Matt: Are you ever afraid in the classroom?

Students: Yes Sir.

Matt: Is that helpful or is it better if you weren't afraid of the teachers?

Students: Helpful.

Matt: Helpful?

Students: Yes Sir.

Student 3: If teachers are not strict, the students are talking when teachers are trying to teach the other students, are making lots of noise, disturbing by throwing papers. If the teachers are strict, they will concentrate on studies.

…

Matt: What happens when you answer a question wrong?

Student 4: You feel nervous.

Student 5: It is better not to make a mistake than to try.

In this final statement, the student clearly highlights the educational atmosphere of a fear of making a mistake to the prevailing pedagogical techniques in Bhutanese classroom create in the students, and this atmosphere continues as students continue through the school system, from the pre-primary level to the tertiary level.

The harsh pedagogical environment created by a fear of getting answers wrong is deeply engrained in Bhutanese education and comes from two primary sources. First, the Indian system – from which the Bhutanese educational model was initially transferred – was a strong proponent of this kind of educational practice,

themselves a product of British colonial educational practices that emphasized this model of pedagogy where knowledge is placed almost out of reach for the student and therefore must struggle to obtain, reinforcing the exoticism and desire for 'modern' and 'Western' knowledge (Seth, 2007). This history of educational philosophy and practice in India is cited as being a preventative barrier to realizing inclusive education in that country as well (Alur & Bach, 2009; Bagley & Verma, 2008; Giffard-Lindsay, 2007; Mitchell & Desai, 2005). The other source of the pedagogical practice of fear and punishment comes from the Buddhist monastic education system in Bhutan that goes back until at least the 8th century. In the monastic education system, students are frequently beaten and the learning environment was extremely strict, according to a former monastic student that is now at Thimphu Special School (Interview, 11 June 2013). In traditional Buddhist education, knowledge is situated as a life-long pursuit that is "characterized by passive reception and repetitive exposition, an enterprise to receive and uphold, to preserve and prolong rather than innovate and invent" (Karma Phuntsho, 2000, p. 103). The passivity and repetition of perceiving and constructing knowledge are influential in forming the pedagogical practices of Bhutanese teachers today. In this, teachers are a product of context, history, and tradition. If teachers are not trained properly and do not 'buy in' to the reforms in an educational system, their pedagogical practice will mimic the pedagogical practices that they themselves received as students (Johnstone & Chapman, 2009). As the Ministry of Government begins to reform the educational system, aligning it with such principles as Gross National Happiness (Karma Ura, 2009; MoE, 2012b) and Child-Friendly Schools

(Rinchen Dorji, 2006), training and maintaining the training of teachers becomes vitally important if the Ministry wants to truly reform the system.

The reliable pedagogical technique that most Bhutanese employ because of their own experience as students – and another element in pedagogical exclusion that constructs disability in the Bhutanese classroom – is teacher-entered pedagogy. This pedagogical practice places knowledge and learning firmly in the hands of the teacher, and it is up to the teacher to distribute that knowledge. Techniques in this manner of viewing learning such as call-and-response, repetition, and recitation are very poor at engaging all students in the classroom, and make the monitoring of student learning difficult. Granted, this may be the most efficient technique to employ in a classroom of 50 students. During these call-and-response portions of lessons, I observed many students not participating; nevertheless, their lack of participation was drowned out by those enthusiastic participants that shouted out the correct answers with glee. (See the Environmental Science lesson in the previous section – Field Notes, 4 October 2012). The students with disabilities are especially sent adrift during these pedagogical exercises, left to tune-out unobstructed.

The teacher in Bhutanese education takes on the primary role in the classroom, meting out punishment and distributing knowledge in equal measure. The pedagogical techniques of fear, shame, call-and-response, drill and repetition construct 'disability' in the classroom through rewarding only those students where learning is fairly effortless; where it is unchallenging to sit still, listen, internalize information, memorize, and communicate. Those that cannot function in such an

environment are marginalized through the silencing of their voices and contributions to the classroom. McDermott, Edgar and Scarloss (2011) put it this way:

> Everyone is born equal and is free to move up, but not everyone moves up, so those who do not move up must have something really wrong with them. In school, the same three steps deliver a similar magic: all children can learn, but many do not, so those who do not learn must have something really wrong with them. (p. 230)

The structural elements, curriculum, and pedagogy in the Bhutanese school system continue to reinforce and construct the view that children that do not learn 'have something really wrong with them.'

Linguistic Exclusion in Bhutanese Education

The fourth theme in the construction of disability in Bhutanese schools is language. Bhutan is a small country with over 20 unique and qualitatively different languages. A Dzongkha speaker from the West cannot understand the Lhop and Rai languages from the South, and s/he can barely understand Sarchop in the East. Dzongkha itself is a difficult language that is derived from Tibetan and has little in common with other language groups. Despite all of these disparate languages, the language of schooling and education is conducted in English and Dzongkha. At the beginning of mass education in Bhutan, the language of school was Hindi. A map of the languages in Bhutan is provided in Appendix C.

Language is an important factor to consider in inclusive education, especially if one takes inclusive education in the broad meaning of accommodating difference within the classroom. In the vignette in the Structural Exclusion section above, little

Ngawang was quite the disruption to the classroom. One of the factors that most likely influence his behavioral issues is that Ngawang's family is from the East, they do not know Dzongkha, Ngawang does not hear Dzongkha at home at all, only Sarchop, and yet must spend his school day immersed in Dzongkha and English. The language of the school does not include Ngawang in a meaningful way. Fortunately for him, his teacher does speak a bit of Sarchop and can give him instructions in the language of the East (Observation, 4 October 2012; 29 March 2013).

A dominant language's place in education can create a desired national identity, but it also has problems in its perception as being the language of dominance and power and of erasing ethnic identity, such as the case in Malaysia (Samuel & Tee, 2013). By choosing a language that not everyone speaks, the Bhutanese educational system is essentially 'disabling' a significant portion of its population immediately upon entering the school door. It is thought that English could serve as a *lingua franca* of sorts – even more neutral than Hindi – but this still disadvantages rural populations that have not had much exposure to English through media.

One the major issues of language in Bhutanese schools is that all of the languages common in Bhutan – Dzongkha, Nepali, *Tshangla* (Sarchop), Bumtahgkha, Kheng, etc. – were originally oral languages with no written equivalent. Only Chökey, the classical Tibetan language used in the monasteries, existed as a written language in Bhutan. Dzongkha has only recently been fitted with a written Tibetan alphabet, but Karma Phuntsho notes:

> Embarrassing and ironic as it may sound, English is now used in Bhutan more than Dzongkha, the national language. Most Bhutanese languages are

basic spoken languages lacking in terminologies for sophisticated ideas and spoken by only a small number of people. Even Dzongkha, the national language and the only written Bhutanese language, was until recently the only spoken vernacular and thus still in want of a fully developed grammar and orthography. The Bhutanese languages do not have sufficient vocabulary and literary resources to be able to cope with the rapid expansion of knowledge in the country … This linguistic conundrum of multiple imperfect tongues with no solid grounding in one as the first language aptly reflects the very fragmented but dynamic personality of many young Bhutanese, who are grappling between the traditional past and postmodern future. They have neither fully relinquished the old world and embraced the new, nor fully inherited the old and rejected the new; they linger in a limbo halfway between tradition and modernity, the East and the West, simplicity and sophistication, between linguistic poverty and proficiency. (2013, "Many Tongues")

Without mastery in any one language, and without a significant literary history outside of the Buddhist monasteries, an educational system bent on literacy has a difficult task.

Going back to the pedagogical discussion earlier, the way language is taught in Bhutan is a challenge for students with reading difficulties. Essentially, literacy is taught through vocabulary acquisition and memorization. There is little application or synthesis of words into ideas, sentences, paragraphs, or themes. The poor writing ability that is a product of the Bhutanese education system became all too apparent to me as a teacher in the higher education system. English is the language of academia in Bhutan, but it is structurally quite different from Dzongkha or other Bhutanese languages. Because of this, I received many college papers that had incorrect tenses, plurals, pronouns, articles, and conjunctions. The primary issue, as I mentioned above, is that teachers who teach language often are not masters of it themselves. Even the curricular materials use English incorrectly.

The teaching of language that I observed at Thimphu Public School was whole word reading, which is a form of sight-word memorization without breaking down the word into phonemic parts. While this may be effective in certain situations, in general this approach to learning literacy has poorer results for students with reading difficulties than using techniques such as phonemic awareness (Joseph, 2008). Reading disabilities such as dyslexia are now thought to be attributed more to how we visualize words, rather than how we phonologically deal with them (Vidyasagar & Pammer, 2009). Learning words visually in their whole form, without breaking them down phonemically, can limit a student's ability to learn literacy. In an educational system that is highly standardized, featuring teachers with limited pedagogical techniques, large class sizes, and with so few specialized personnel, taking the time to help a student with a reading disability using a plethora of proven practices and techniques is nearly impossible in Bhutan. This issue is multiplied when the language that the student is learning is not even their primary or secondary language. Thus, language and linguistic curriculum are also key factors in constructing disability in Bhutan.

Conclusion

Almost the entirety of this chapter was devoted to many negative traits and challenges in Bhutanese education, but there are positive traits as well. To conclude, I want to identify some positive trends that I have witnessed in my field observations.

First, it is worth noting that the Bhutanese educational system is still quite young and has come very far in just a short while. The system has seen exponential growth since 1961, and that has only come into establishment in the past 30 or so years. Since the 1980s, Bhutan has increasingly become entirely independent in how it manages its education system. It was only in 2003 that the Royal University of Bhutan was established. Before that, the Bhutanese higher education system was beholden to Delhi University.

Second, in the past 10 years there has been incredible growth in trying to get *all* children into school. The Special Education Unit in the Ministry of Education is only four years old, and its policies are only in the beginning stages of being realized. There are those are frustrated that change is not happening fast enough, but a little perspective points out that change has actually happened rapidly – especially in a country where change does not tend to happen rapidly.

Third, Bhutan is in a position today in which many Bhutanese find themselves eager to engage with the world and appear 'modern.' While there are widening generational gaps and a lot of identity confusion among Bhutanese youth, this engagement with cosmopolitan ideas has brought about newer thinking and recognition of different experiences and worldviews and continues to influence greater thinking around what it means to be a multicultural society.

Fourth, I observed many instances in my fieldwork in Bhutan where I found children to be inclusive in their play. The following is a representative example from my school observations at Thimphu Public School:

Recess, Class IV

Today, the children with severe disabilities from the self-contained classroom are joining all of Class IV for recess time. The boys play a large group ball-throwing game, some girls play ball in smaller groups; others play a game that resembles "London Bridge is Falling Down." The students with disabilities blend in seamlessly with the 'regular' students and it takes me a minute to locate them.

Dorji, a student with severe autism, throws the ball while a pack of boys chase after, tackling each other in quest of the prize. There are no rules to this game, at least from my observational viewpoint. The boy that wins the ball returns it to Dorji and Dorji winds up to throw the ball again and the mad scramble beings anew. No adult is supervising, nor is any adult facilitating Dorji's inclusion – at least not directly. Every time Dorji throws the ball, he extends his hands in the air and cheers.

Meanwhile, a small group of girls has engaged with Sonam, another student with severe autism. The girls chose to play with Sonam, and try to get her to throw the ball, patiently instructing and prompting her and fetching the ball when – inevitably – Sonam flings the ball wildly askew.

When I asked the 'regular' boys in Class IV about recess, they enthusiastically stated that it "was very fun, Sir" and, without much prompt from me, also stated, "we like playing with the disabled kids." (Observation, 13 October 2012)

Finally, the Ministry of Education is pushing Education for GNH, which could have positive systemic and structural implications for inclusivity in the classroom. This initiative is based on progressive and student-centered curricula that seeks to promote education as a positive experience. It synthesizes elements from the 'Best Practices' of 'Western' examples with Bhutanese moral and values. The *Training Manual* for Education for GNH includes these goals:

We want to see school graduates who are genuine humans beings; realizing their full and true potential; caring for other; ecologically literate; contemplative as well as analytical in their understanding of the world; free of greed and without excessive desires, knowing, understanding, and appreciating completely that they are not separate from the natural world and from; in sum manifesting their humanity fully. (MoE, 2012b, p. x)

The emphasis on creating a positive, caring, contemplative space to 'manifest humanity fully' is certainly in line with many advocates of inclusive education, and universal design for learning (Rose & Meyer, 2006). However, most teachers and school administrators believe that the Ministry of Education is having a hard time implementing and operationalizing this initiative to produce any kind of meaningful outcome. This was also found by Pema Tshomo (2013) in teacher interviews that teachers were overwhelmed by having to put more thought into lesson planning and had a hard time adjusting to a student-centered pedagogical style with little training.

Ultimately, reforming the embedded structural and cultural elements of any school system is difficult work. Currently, the place of schooling in Bhutanese society is to segregate, exclude, and marginalize. Throughout this chapter, I have explored this process through structural, curricular, pedagogical, and linguistic elements of the Bhutanese education system. If initiatives like Education for GNH are to take root, than a greater recognition of the ways in which the current system constructs disability is important.

CHAPTER SIX: Conclusion

Introduction

Disability in Bhutan is a complex, dynamic, and transmutational phenomenon. In this dissertation, I have attempted to show that disability is a constructed phenomenon that becomes constructed through a complex interaction of culture, history, societal structure, policy, and in negotiation with exogenous constructions of disability that underwent similar constructions within their own local contexts. In this chapter, the conclusion of this dissertation, I will review the central argument and research questions of this dissertation and summarize how each chapter contributed to addressing these questions. I will conclude this chapter with the implications of this research and future research plans in continuation of this dissertation.

Research Questions and Arguments

My four research questions can be used as a guide for organizing the contributions of the previous chapters to the overall study:

- What contextual factors help to explain why the Bhutanese government has recently adopted an education policy for youth with disabilities?
- How is 'inclusive education' being interpreted and enacted by key educational stakeholders in Bhutan (educational administration officials, principals, teachers, students) and through Bhutan's educational policies?
- How are international constructions of disability incorporated or contested in local constructions of disability?
- What structures exist in Bhutanese schools today that 'disable' students?

The first research question on the contextual factors that explain the adoption of education policy for youth with disabilities was primarily explored in Chapter Three and Chapter Four. Some of the most important contextual factors were a desire to reach the goals of 'Education for All,' a value placed on certain key international human rights initiatives such as the Convention on the Rights of Persons with Disabilities, the international experiences of influential educational policy makers, and the work of a select number of international development 'experts' who have shaped the discourse of disability in Bhutan. Many of these contextual factors, I argue, come down to the individual level of analysis because in many cases individuals can be found that have influenced Bhutanese policy decisions. Individual Bhutanese policy actors whom I interviewed and observed in public forums were able to articulate that they, themselves, were influenced by their personal experiences travelling outside of Bhutan. These individuals strongly advocate for a vision of disability and society that is informed by exogenous constructions of disability, but are uniquely situated because they are Bhutanese citizens.

The second research question on the interpretation of 'inclusive education' was explored both in Chapters Four and Five. As explained in Chapter Three, this study was a vertical case study that examined 'inclusive education' at multiple levels and with an emphasis on the socio-cultural elements of policy. At the meso-level, policy makers were found to be interpreting 'inclusive education' to mean a specific policy for students with disabilities, which is only one of many ways to interpret the meaning of inclusive education (Ainscow, Booth & Dyson, 2006). Intermingled with this interpretation was a particular deference to the medical model of disability,

which pathologizes disability and focuses on the individual impairment for 'treatment.' Policy makers, not to mention the National Policy on Special Educational Needs itself (MoE, 2012c), openly support the separation of youth with moderate to severe disabilities into special schools and facilities. At the micro-level, Chapter Five demonstrates that inclusive education policy becomes filtered through teachers' practices and school structures that disable certain groups of students. The construction of disability through curricular and pedagogical elements encounters inclusive education philosophy and alters its form to fit pre-conceived conceptualizations of 'schooling,' rather than inclusive education radically changing the educational philosophy of the school system of Bhutan.

While inclusive education represents a paradigmatic change in how education and schooling are conceived, the reality in practice is that a belief in inclusivity becomes interwoven with existing beliefs of education and schooling. As Rizvi and Lingard (2010) suggest, policies are 'palimpsests,' meaning that when new policies are written, traces of old policies still remain and can never completely be erased. In this case, a new policy of inclusivity may be spreading in Bhutanese schools, but inclusive policy may never completely erase deeply embedded practice. My classroom observations suggest that curricular and pedagogical techniques in the Bhutanese classroom are counter-productive to the philosophy of inclusive education because of their teacher-centeredness, placement of knowledge, and view of how students learn. Inclusive education policy shifts in the face of this practice to become more about ways to educate students with disabilities *somewhere*, rather

than reimagining an educational system that provides accessibility and quality to all students at the same time and in the same place.

The third research question on the interaction between international and local constructions of disability was similarly explored at the meso- and micro-levels in Chapters Four and Five. Specifically, Chapter Four examined the co-existence of the medical model and the rights-based model. These two discourse streams actually interact with each other at all levels. Internationally, there is a vigorous debate on the merits of each construction of disability (see Chapter One). The debate and contention between models is somewhat masked as it becomes picked up in Bhutan, so that all that remains is an uneasy relationship between the medical model and the rights-based model. The medical model construction of disability coalesces well with existing religious-cultural constructions of disability in that the focus is on individual impairment, although perhaps it is somewhat incongruous with traditional Bhutanese medicine – which was dismissed by the American doctors during the neurodevelopment workshop. The rights-based model represents a more radical shift in Bhutanese society, and many disability advocates influenced by this expressed frustration that changes in society were not occurring fast enough.

The final research question on the structural elements that exclude and disable students in Bhutanese schools was entirely the domain of Chapter Five. In this chapter, I first examined the existing religious and cultural conceptualizations of disability that both students and staff could possibly bring into their schools everyday. Next in this chapter, I examined how structural, curricular, pedagogical,

and linguistic elements of the school system exclude and 'disabled' students through elements such as physical accessibility; teacher staffing, training, and quality; high-stakes testing; corporal punishment; teacher-centered pedagogy; and the complex and challenging language usage and instruction that is a reality in Bhutan. These structural elements all were cited as disabling students in various ways.

Central to these research questions was a theoretical debate on educational policy transfer. In Chapter Three, I examined the theoretical claims and stances of world culture theory, world-systems theory, and global constructivism. At the conclusion of Chapter Three, I argued that a world culture theorist could look at the case of the educational policy transfer in Bhutan and observe convergence and isomorphism. However, the level of decoupling and 'loose coupling' present in the case ultimately reject world culture theory as a significant explanation for Bhutan. Central to this claim is Steiner-Khamsi's (2010; Steiner-Khamsi & Stolpe, 2006) work and arguments around 'global talk' and 'policy speak.' A world-systems theoretical analysis was rejected more decisively as the level of coercion necessary for such an analysis was not found in my data or research. Ultimately, I argue that the global constructivists – specifically Anderson-Levitt, Carney, Steiner-Khamsi, Levinson, Phillips, Schriewer, and Vavrus – had the most relevancy in providing a socio-cultural understanding of the Bhutanese case.

This dissertation contributes to the global constructivist body of literature in the following ways. First, it provides a vertical case study demonstrating a gap between socio-cultural practice of policy and the policy language and discourse used. The gap between discourse and reality supports Steiner-Khamsi's (2010)

argument of 'global talk' as being more than simply a case of decoupling. Second, this dissertation identifies that policy transfer can be best viewed in stages and levels of interpretation (e.g. Phillips & Ochs, 2003) because the case of Bhutan demonstrates that multiple actors and contextual factors influence policy transfer. It also situates policy as something existing as an ideological flow that is appropriated locally – in other words, Carney's (2009) notion of a policyscape. Third, this dissertation supports an anthropology of policy approach – as promoted by Shore and Wright (1997), Sutton and Levinson (2001), and Vavrus and Bartlett (2009) – of examining the meanings of policy through the local actors tasked with interpreting and implementing such policy. This is also an approach advocated by Anderson-Levitt (2003) in her argument that world culture theory fails to capture the practice and creolization of education by local actors.

This dissertation makes other contributions as well, particularly to research on the cultural constructions of disability, disability and globalization, disability and education in Bhutan, and to the field of comparative education. First, my research in Bhutan demonstrates a specific case where the international discourse streams of the medical model and the rights-based model interact and weave themselves through multiple levels of society. This study helps to understand that these contradictory constructions of disability are problematic when encountering differently constructed views of disability. Through interviews, I was able to discover that many Bhutanese try to reconcile these two discourse streams into their construction of disability, which is problematic when thinking about the philosophical foundations of inclusive education. Inclusive education, itself,

originated from a particular context and has its own construction of disability (Artiles, Kozleski & Waitoller, 2011).

Second, my research in Bhutan demonstrates that inclusive education reform is challenged by the existing historical and cultural contexts of a school system. In the case of Bhutan, the entrenched curricular and pedagogical structures of the school system – informed by Indian colonial education and Bhutanese monastic education – provide little space for inclusive education philosophy to enter. However, Buddhist-informed Bhutanese society does provide some opportunities to conceptualized disability in a more inclusive manner, although the expression of Buddhism in Bhutan represents a complex phenomenon that should not be thought-of as one-dimensional. This study helps to understand at a deeper level the complexity and challenges of implementing inclusive education policy reform into existing contexts.

Third, my research in Bhutan is one of the first explorations of the phenomenon of disability in the country. There is an identified research deficit in studying disability in Asia through a religious and cultural lens (Miles, 2000). Chapter Five, in particular, explores the phenomenon of disability as it is experienced religiously (Buddhist) and culturally. This study helps to enrich and deepen scholarship on disability in Asia – especially in the under-studied country of Bhutan.

Finally, my research in Bhutan also contributes to the research and literature of field of comparative education. Specifically, I engaged with the major theoretical debates between world culture, world-system, and global constructivist theorists.

These theories represent major debates in the field of comparative education, and I believe – as does Vavrus and Bartlett (2009; 2011) – that a vertical case study approach can contribute to these theoretical debates by grounding them in the lived realities of the cases and actors. The central argument throughout this dissertation has been that individual actors matter, at all levels, and that this is often missed by macro-sociological theories such as world culture and world-systems. This study helps to advance the global constructivist argument that more attention needs to be paid to the lived-experiences and social imaginations of individual actors.

Implications for Policy

One the main purposes for conducting a vertical case study in Bhutan was to examine the relationships and transversal spaces between local and global levels, as well as multiple policy actors, interpreters, and implementers. This dissertation demonstrated that a policy such as inclusive education faces a plethora of interpretations at multiple levels because of differentiated constructions of disability, education, and schooling. Understanding this allows policy makers and advocates to better inform their own policy-making practice in the following ways.

First, it is important that advocates for inclusive education – especially those that travel with this policy internationally – understand that inclusive education calls for a radical revision in the relationship between school and society in most societies. Countries such as Bhutan still primarily view schooling as an elite activity. Even though Bhutan has been successful in getting most children in school, the system itself is still structured to support only the top learners, while marginalizing

the rest through structural, curricular, and pedagogical practices. Similarly, the relationship between knowledge and student was – and still is – viewed in a teacher-centered and uniform way. Inclusive education in which educational structures are universally designed for heterogeneous learners represents a vastly different approach to the relationship of teacher and student, as well as the student to the curricular material.

Second, and related to the first, advocates for inclusive education need to better work within existing socio-cultural contexts. Rather than using tactics such as coercion, "other worlding," and "best practices" to transfer one complete inclusive education policy from one context to another, advocates for inclusive education should better understand the local realities and contexts and work within that system. The case of Bhutan represents an opportunity to observe this in action, as in many cases it is the Bhutanese themselves that are working within their own context (albeit, informed by their international experiences). So, too, there are opportunities to implore local initiatives to help realize inclusive education. This is the case with Education for GNH, which should be more strongly recognized and implemented.

A third implication for inclusive education policy through this dissertation is that there are dilemmas within inclusive education that the case in Bhutan highlights. Many Bhutanese – including those with disabilities – feel strongly that education for students with severe disabilities and sensory impairments should be educated separately. Many international inclusive education advocates balk at making exceptions to inclusivity, but also fail to recognize that sometimes students

choose to exclude themselves and they have a right to do so. While it is true that persons with disabilities are stigmatized and marginalized in many different ways in Bhutanese society, many also feel empowered through attending special schools. It is hard to say whether or not a completely realized inclusive education policy would ultimately empower students with disabilities more, or would enforce standardization and a loss of identity – there are fierce arguments on both sides. What is certain, however, is that this is a dilemma in inclusive education thinking that has not, and will not, go away. Hopefully, this dissertation serves to enrich and recognize this dilemma further.

Fourth, and more specific to Bhutan, this dissertation identifies many instances where the Bhutanese school system constructs disability. There are, however, places in which a full realization of the National Policy on Special Educational Needs would serve to alleviate these exclusionary elements. This is especially the case in the pre-service and in-service training of teachers and the call for additional teachers and aides in the classroom. A more flexible curriculum and pedagogy can be introduced through a fully realized Education for GNH policy that would greatly support inclusive education in Bhutan.

Another specific policy implication for Bhutan is the construction of disability through high-stakes testing. This may be one of the harder things to change, as it seems the global trend is an increase of testing and examination rather than a decrease. However, it is entirely possible to create prescribed modifications, accommodations, and alternative assessments to these high-stakes exams that would be more inclusive for more learners. This is still a 'square peg in a round hole'

solution in that it tries to provide short-term solutions without addressing larger systematic concerns. Given that widespread systemic change cannot happen overnight, the primary focus should be on making examinations more accessible and more authentic to applicable life and vocational skills.

Lastly, there needs to be greater coordination amongst those that work in disability service delivery. I would suggest that this could occur through the already-existing Special Education Unit within the Ministry of Education. Currently, many stakeholders are not aware of other on-going projects that other stakeholders are enacting. This dissertation has demonstrated that there are many individuals that are working towards greater realization of inclusive education – and an inclusive society in general – but each person and group that they are involved with have slightly different messages and perspectives. Greater cohesion between education, health, civil service organizations, and other government services surrounding disability would help control and focus the exogenous discourses that enter Bhutan. Previously in Bhutan's history, this was perhaps easier to do given the absolute monarchy system. In a democratic Bhutan with so many connections to the outside, portraying a coherent message on anything is a seemingly impossible task. However, this is also an opportunity to more significantly engage the citizenry and, with a stronger unified policy around disability amongst all stakeholders, mobilize the Bhutanese people to support greater access and quality in education.

Future Research

In the future, I plan to continue this research and the findings discovered in Bhutan. One way to do this is through a deeper, more longitudinal, study to affirm these findings. A year in Bhutan is not enough to truly understand all of the discursive and cultural elements at work. The fast-paced changes of Bhutanese society in the 21st century also represent an opportunity to study an evolving society as it engages and negotiates its identity and place in the world.

A continuing study on disability and schools in Bhutan would begin by following the ratification and implementation of the National Policy on Special Educational Needs in the next few years. Ideally, this research would be in partnership with the Ministry of Education in order to provide some evaluation as to program implementation.

At the Regional Seminar on Inclusive Education in December 2013, the Ministry of Education officials revealed that they hope to expand their inclusive education pilot program to 15 schools – doubling the number of inclusive schools in the country. This is another opportunity to obtain rich ethnographic data on the experience of transforming existing schools into inclusive schools. Teacher and parent interviews would be invaluable in this situation in order to better understand how attitudes and constructions of disability change with a change in educational philosophy.

Another aspect of disability that warrants a deeper study is the transition of youth with disabilities into adults with disabilities in Bhutanese society. This dissertation barely scratched the surface of the experiences of adults with

disabilities in terms of employment, vocational training, housing, medical support, and other societal implications. As more youth with disabilities are served in schools, the result is that there are more adults with disabilities that have real skills that can be applied to work. There are only a handful of employment opportunities for adults with disabilities that I know of currently in Thimphu. A whole other study should be conducted to study the interplay between schooling and employment pertaining to persons with disabilities.

Concluding Thoughts

The Druk Air plane engages every bit of thrust from its engines as it barrels down the runway at Paro International Airport. It is a short runway on one of the only bits of land flat enough to have an international airport in Bhutan. The plane must climb steeply, clearing nearby peaks and sling-shoting out of the Paro valley.

I glue my face to the window, thinking about my year in Bhutan and all of the life-changing experiences I have had. Below me is the Paro *dzong* [fortress], perched magnificently above the Paro valley with its red and yellow roofs and thick white walls. The rice paddies below the dzong are an emerald green, engorged with water from the summer monsoon rains. As the plane rapidly ascends, I can just make out some Bhutanese in the fields – men hunched over in their *ghos* and women with babies tied to their backs.

Eventually, the plane climbs too high to make out individuals and Bhutan becomes a vista of ragged peaks shrouded by clouds. This too, disappears below me and all I can see is a blanket of clouds and haze that accompany me all the way to the

Indira Gandhi International Airport in New Delhi. As Bhutan disappeared from view, lost in the clouds, I thought: *did that really happen? Did Bhutan really exist?*

The answer to both those questions, obviously, is a resounding, *yes*, but I can understand how and why many think of Bhutan this way – a mystic Brigadoon of mountains and clouds. It is a place that encompasses the people in the rice paddies, as well as the mountains and the clouds. They shape each other. They each exist because of the other. In *The Snow Leopard*, Peter Matthiessen writes,

> Snow mountains, more than sea, or sky, serve as a mirror to one's own true being, utterly still, utterly clear, a void, an Emptiness without life or sound that carries in Itself all life, all sound. Yet as long as I remain an "I" who is conscious of the void and stands apart from it, there will remain a snow mist on the mirror.

What will become of Bhutan? No one knows this, of course, but many speculate that globalization will ruin it, alter it, kill the unique cultural forces that inhabit it. I am more optimistic. Spending more time with Bhutanese youth than many of the doomsayers, I see vibrancy in their eyes and resilience in their spirit. I see youth negotiating the future while understanding the past. The children walk up the hill to school, they walk down the hill to school. They wear their *gho* and *kira* and recite the Buddhist prayers by heart. They listen to Katy Perry, have Spiderman backpacks, and are extremely loyal to Real Madrid or Barcelona but never both. For youth with disabilities in Bhutan, as well, there are negotiations occurring. These youth are defined by others – through socio-cultural constructions, by the structures of the school system, by global discourses – and they attempt to forge their identity and agency against these social structurations.

In Buddhism, one of the central pillars is the concept of impermanence. "There is no there there," as Gertrude Stein once remarked. Bhutan has not arrived anywhere, nor will it ever in the future. Bhutan is not at an impasse … only change; endless permutation and transfiguration. All of us trying to make sense and imagine the world before it evaporates once again.

The clouds swirl the mountains and the rain becomes the sun.

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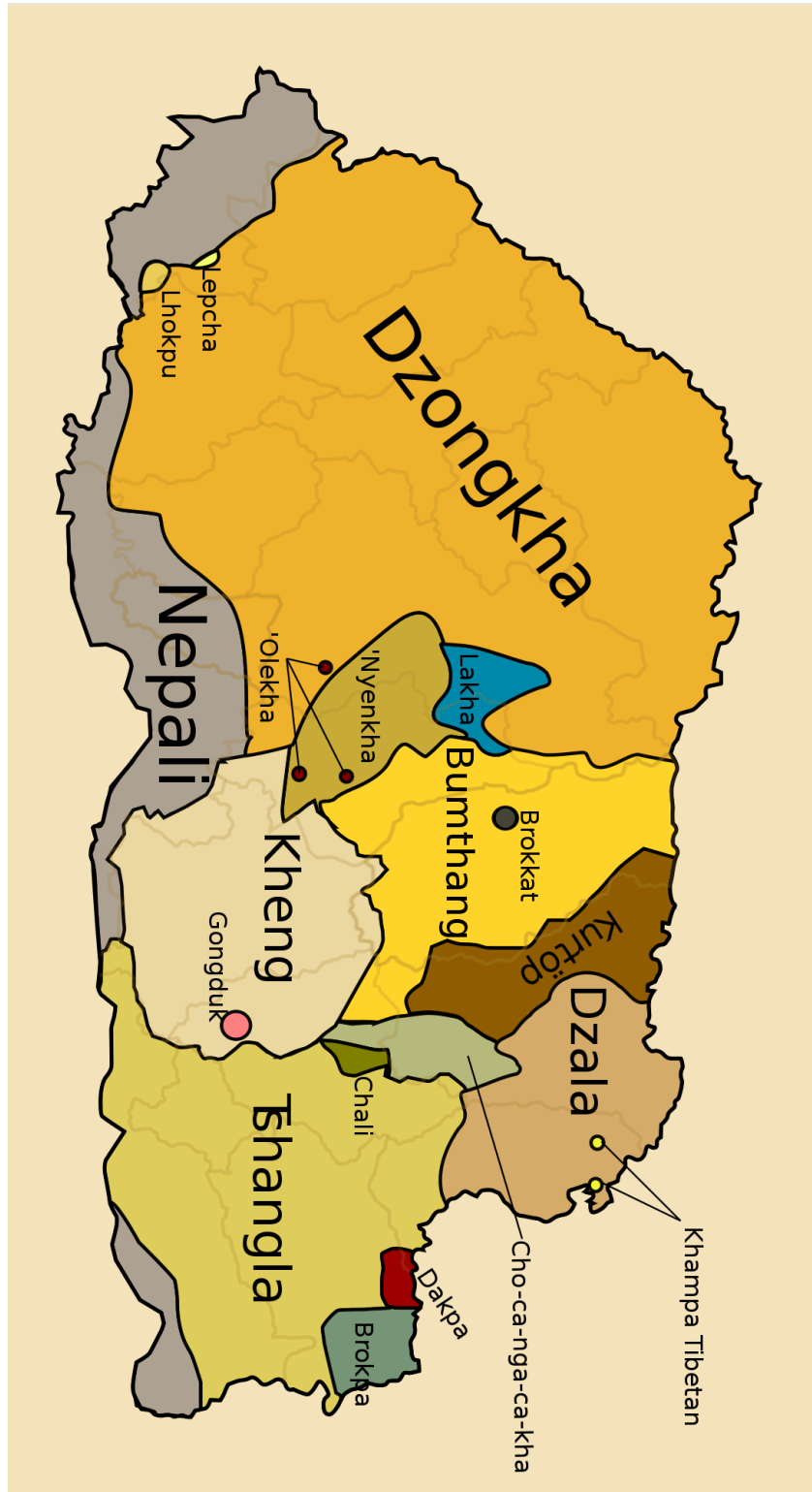
APPENDIX A: Map of Bhutan and Region
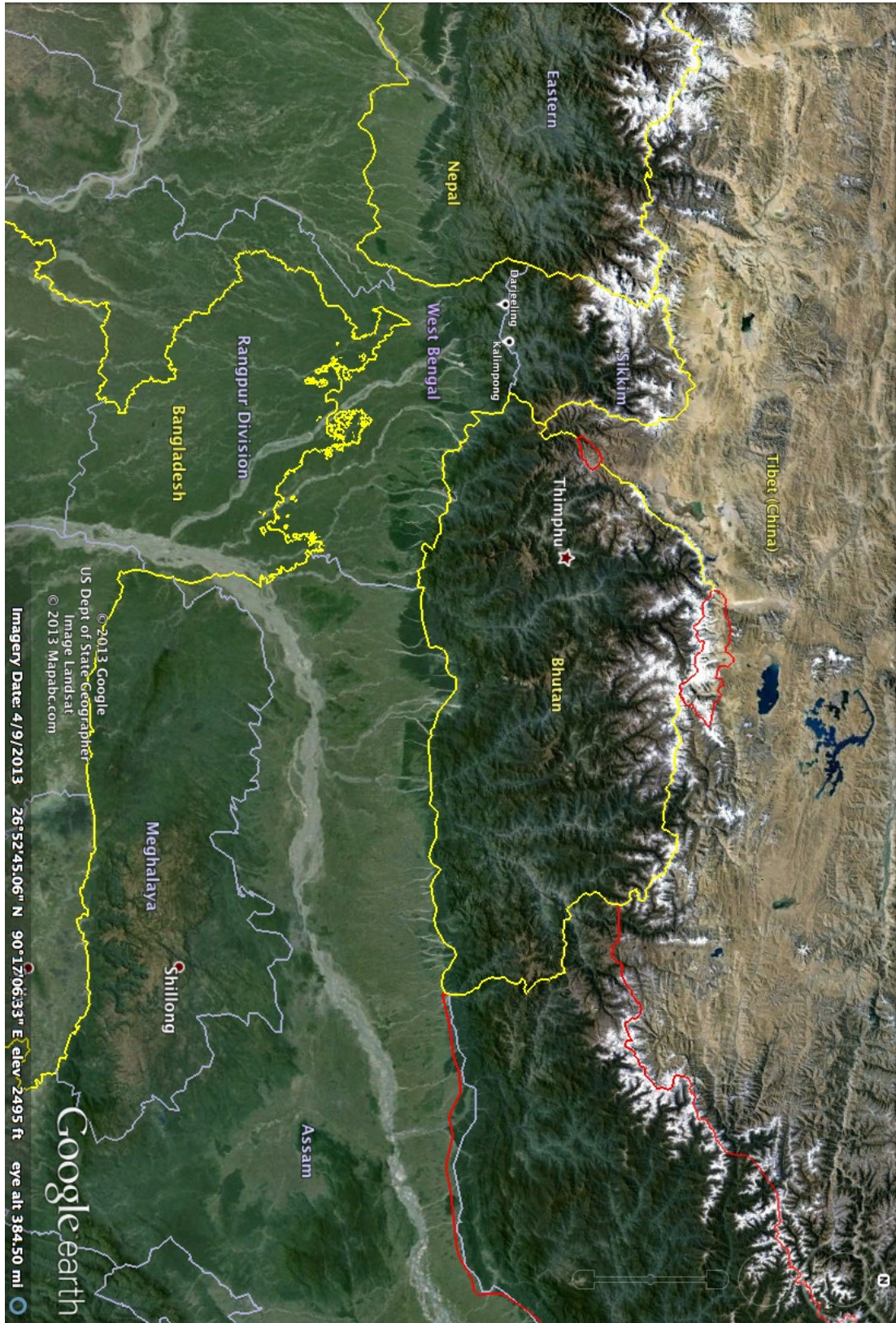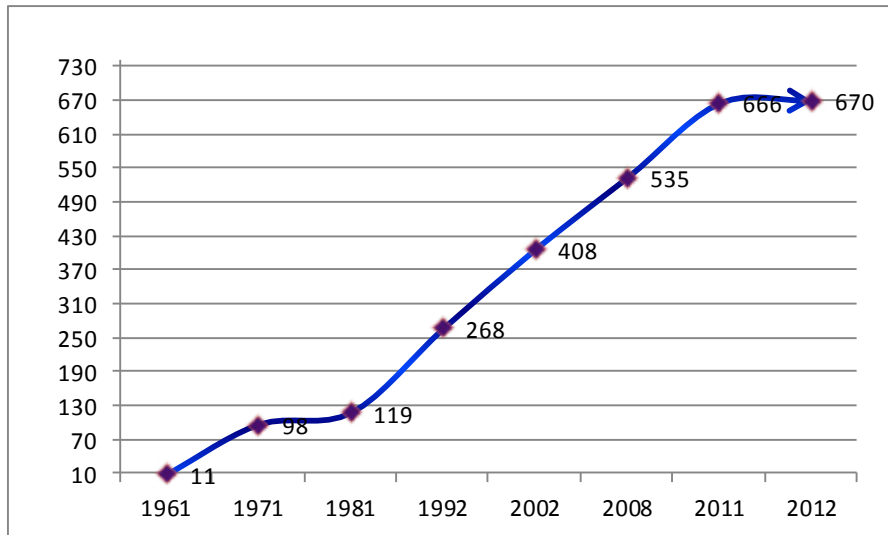
APPENDIX B: Bhutanese Political Map

APPENDIX C: The Languages of Bhutan

APPENDIX D: The Bhutanese Education System At-a-Glance (MoE, 2012a)

Growth in the Number of Schools and Institutes (1961–2012)

Growth in the Number of Students in the Bhutanese Education System (1961–2012)
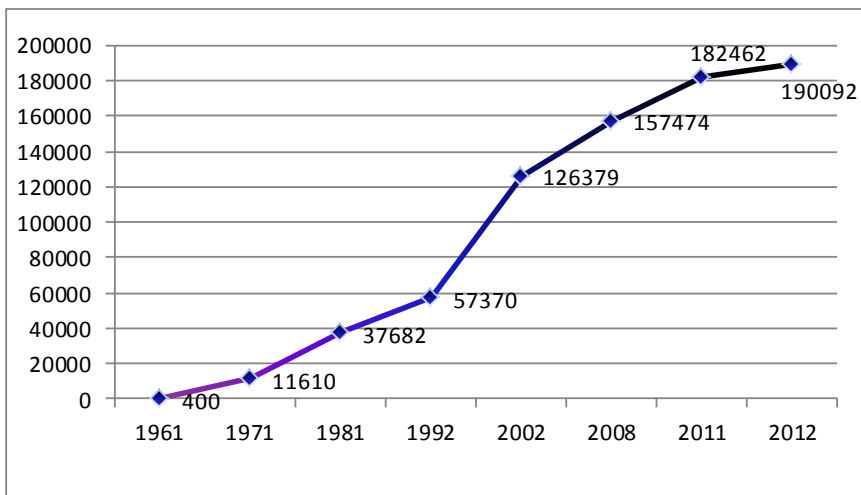
General Education Structure

General Eduaction Structure in Bhutan									
				Education System					Labour Market
Level	Age (in years)	Class		School/Tertiary Education System			voc. Edu. System	NFE	
				Public	Private	Continuing Education			
Tertiary Level	22 21 20 19	4th Yr 3rd Yr 2nd Yr 1st Yr							
Hogher Sec. Level	18 17	XII XI							
Secondary Level	16 15 14 13	IX VIII VII							
Primary Level	12 11 10 9 8 7 6	VI V IV III II I PP							
Pre-School (ECCD)	5 4 3	Day Care Day Care Day Care							
	2 1 0								

(Note: Shaded-in boxes indicate level at which a student may enter that particular track; NFE = non-formal education)

Curriculum, Class PP–XII

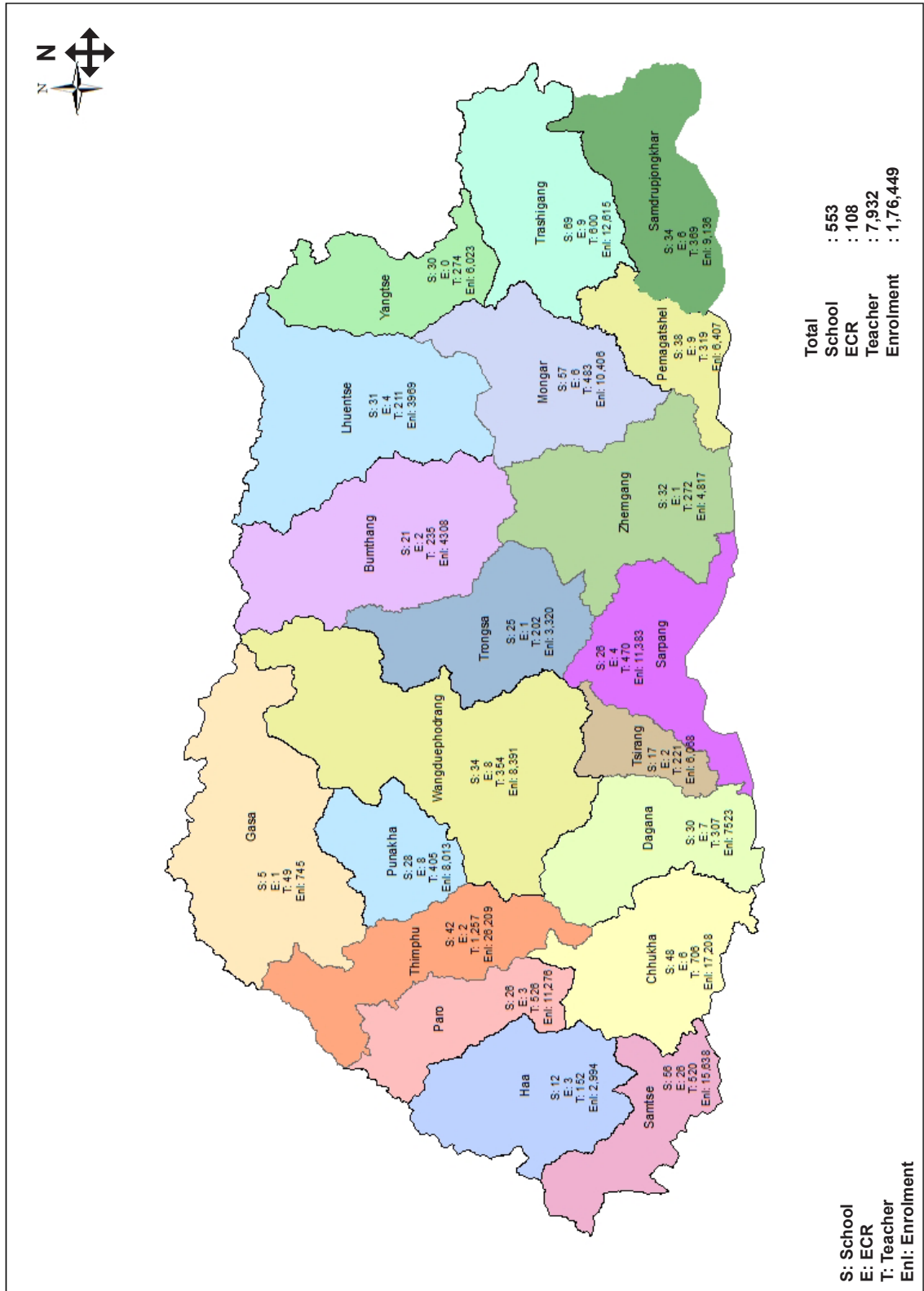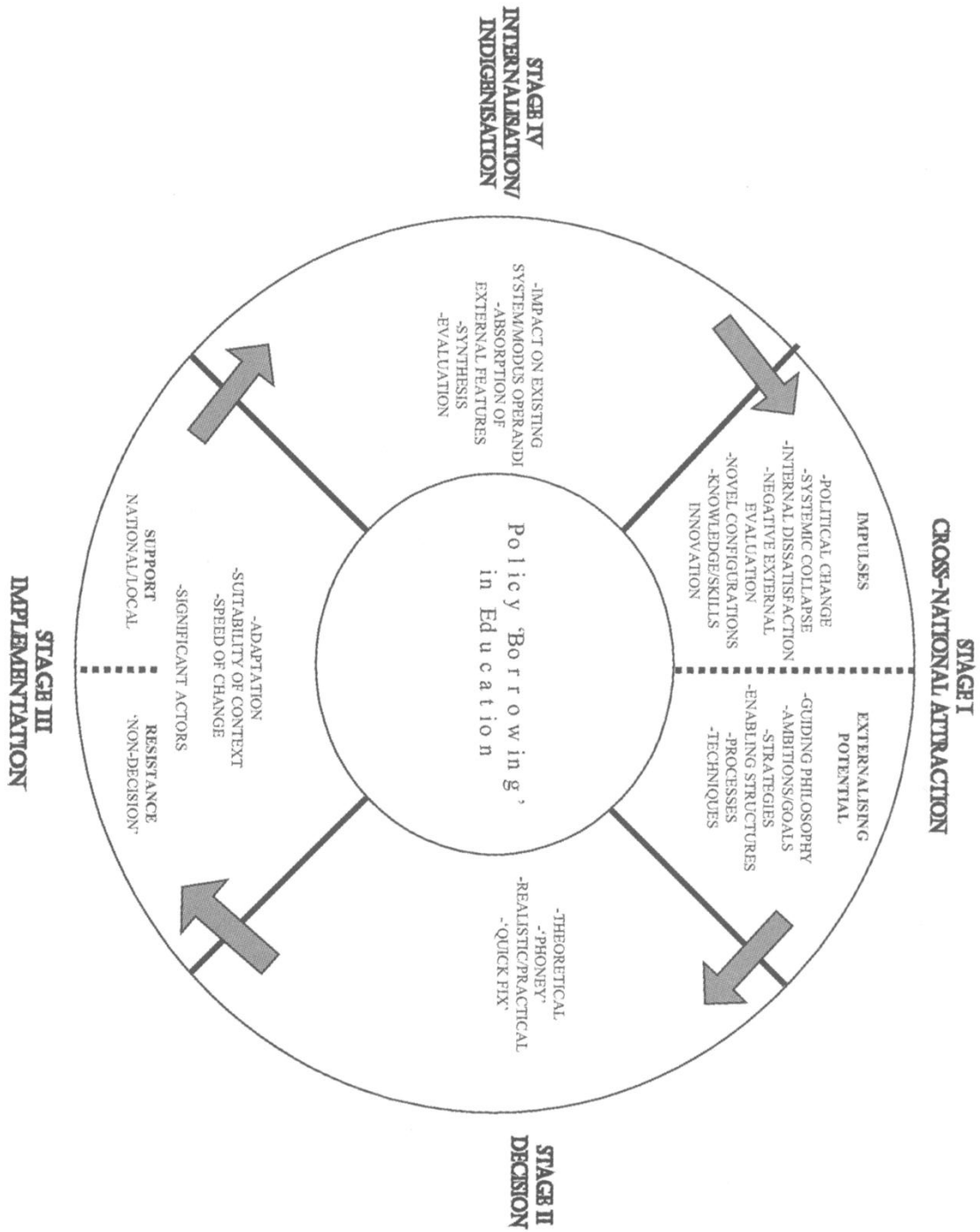| Area	Subjects	Primary Education							LSS		MSS		HSS	
		PP	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
Language	Dzongkha	■	■	■	■	■	■	■	■	■	■	■	■	■
	Rigzhung												■	■
	English	■	■	■	■	■	■	■	■	■	■	■	■	■
	English Literature												■	■
Mathematics	Mathematics	■	■	■	■	■	■	■	■	■	■	■	■	■
	Business Mathematics												■	■
Science and Technology	Science					■	■	■	■	■				
	Physics										■	■	■	■
	Chemistry										■	■	■	■
	Biology										■	■	■	■
	Computer applications										■	■		
	Computer Science												■	■
Human Society and Environment	Environmental Studies	■	■	■	■									
	Social Studies					■	■	■						
	History								■	■	■	■	■	■
	Geography								■	■	■	■	■	■
	Commercial Studies										■	■		
	Commerce												■	■
	Accounting												■	■
	Economics										■	■	■	■
Creative and Practical Arts	Visual Arts and Craft	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣
	Songs, Dances, Music	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣
Health, Physical Education and Personal Development	Health and Population Studies					▣	▣	▣	▣	▣	▣	▣	▣	▣
	Games and Sports	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣
	Moral and Value Education	■	■	■	■	■	■	■	■	■	■	■	■	■
	Scouts				▣	▣	▣	▣	▣	▣	▣	▣	▣	▣
Socially useful and Productive work	Agriculture and Social Forestry	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣	▣
	SUPW										▣	▣	▣	▣
	Basic Vocational Skills								▣	▣	▣	▣	▣	▣

■ Learning areas with specific subjects and periods set in the time table

▣ Learning areas addressed in co-curricular programmes, school organisations or integrated in the subject areas

Distribution of Schools, Extended Classrooms (ECR), Teachers, and Students

Yangtse
S: 30
E: 0
T: 274
Enl: 6,023

Trashigang
S: 69
E: 9
T: 600
Enl: 12,615

Samdrupjongkhar
S: 34
E: 6
T: 369
Enl: 9,136

Lhuentse
S: 31
E: 4
T: 211
Enl: 3969

Mongar
S: 57
E: 6
T: 483
Enl: 10,406

Pemagatshel
S: 38
E: 9
T: 319
Enl: 6,407

Bumthang
S: 21
E: 2
T: 235
Enl: 4308

Zhemgang
S: 32
E: 1
T: 272
Enl: 4,817

Trongsa
S: 25
E: 1
T: 202
Enl: 3,320

Sarpang
S: 28
E: 4
T: 470
Enl: 11,383

Gasa
S: 5
E: 1
T: 49
Enl: 745

Wangduephodrang
S: 34
E: 8
T: 354
Enl: 8,391

Tsirang
S: 17
E: 2
T: 221
Enl: 6,088

Dagana
S: 30
E: 7
T: 307
Enl: 7523

Punakha
S: 28
E: 8
T: 405
Enl: 8,013

Thimphu
S: 42
E: 2
T: 1,257
Enl: 26,209

Chhukha
S: 48
E: 6
T: 706
Enl: 17,208

Paro
S: 26
E: 3
T: 528
Enl: 11,276

Haa
S: 12
E: 3
T: 152
Enl: 2,994

Samtse
S: 56
E: 26
T: 520
Enl: 15,838

Total	
School	: 553
ECR	: 108
Teacher	: 7,932
Enrolment	: 1,76,449

S: School
E: ECR
T: Teacher
Enl: Enrolment

APPENDIX E: Policy Borrowing Model (Phillips & Ochs, 2003, p. 452)

STAGE IV
INTERNALISATION/
INDIGENISATION

STAGE I
CROSS-NATIONAL ATTRACTION

STAGE III
IMPLEMENTATION

STAGE II
DECISION

Policy 'Borrowing'
in Education

IMPULSES
-POLITICAL CHANGE
-SYSTEMIC COLLAPSE
-INTERNAL DISSATISFACTION
-NEGATIVE EXTERNAL
EVALUATION
-NOVEL CONFIGURATIONS
-KNOWLEDGE/SKILLS
INNOVATION

EXTERNALISING
POTENTIAL
-GUIDING PHILOSOPHY
-AMBITIONS/GOALS
-STRATEGIES
-ENABLING STRUCTURES
-PROCESSES
-TECHNIQUES

-THEORETICAL
-'PHONEY'
-REALISTIC/PRACTICAL
-'QUICK FIX'

-IMPACT ON EXISTING
SYSTEM/MODUS OPERANDI
-ABSORPTION OF
EXTERNAL FEATURES
-SYNTHESIS
-EVALUATION

SUPPORT
NATIONAL/LOCAL

-ADAPTATION
-SUITABILITY OF CONTEXT
-SPEED OF CHANGE

-SIGNIFICANT ACTORS

RESISTANCE
'NON-DECISION'

APPENDIX F: Key Questions for Analysis of Educational Policy in a Globalized Context (Rivzi & Lingard, 2010, pp. 53-55)

Policy issues	Questions for analysis
Contextual Issues	
Historical, political and bureaucratic origins	Where did this policy originate, including consideration of any relevant global factors/institutions?
	Why was this policy adopted?
	Why was it adopted now?
	Does this policy have incremental links to earlier policy/policies?
	Is the policy part of a policy ensemble?
	Who were the 'players' (groups, interests, individuals) involved in establishing the policy agenda and the policy?
Policy and Textual Issues	
Discursive formation of policy and policy problem	To which 'problem' is the policy constructed as a solution?
	How is the policy problem conceptualized? What alternative problem constructions have been rejected/neglected?
	How has the policy constructed its context and/or history?
	Will the policy as constructed 'solve' the problem to which it is a response?
	What complementary policies are required (in education and elsewhere) to ensure the achievement of the policy's goals?
Textual considerations	How has the policy text been constructed linguistically? Are there similarities between international discourse and this policy?
	Has the policy text been 'mediatized'?
	How have any competing interests been sutured together in the text?
	What is the 'intertextuality' of the policy; that is, how does it sit in relation to other policies or a 'policy ensemble'?
Interests involved and underpinning the policy	Who has advocated and promoted the policy and why?
	Where are the advocates located (inside/outside the state bureaucracy and policy processes, inside and outside the nation)?
	How have competing interests been negotiated in relation to the policy agenda and in relation to the production of the specific policy text?

Policy structuration	What have been the effects of national/provincial state structures on the policy processes?
	What role have international agencies played in its promotion?
	Have globalization and associated changes been invoked as a rationale for the policy?
	Has the policy been 'borrowed' from a 'reference society'?
	Is the policy driven more by ideology than by research evidence?
Resource issues	How have empirical research and policy precedents been used in support/justification/production of the policy?
	What resources (intellectual, empirical, research, human, material)
Implementation and Outcomes Issues	
Implementation strategies	How is the policy 'allocated' and disseminated to its target population?
	What are the strategies for implementation?
	Is this a material or symbolic policy?
	Is this a distributive or redistributive policy?
	Are adequate resources and professional development mobilized by the policy?
	Is there an evaluation strategy for the policy and its implementation?
	Have indicators been constructed for measuring policy effects and accountability?
	Are these relevant and appropriate?
	What is the reception given to the policy at the site of implementation practice?
	What is the implied 'ideal professional practitioner' in the policy?
	How does the policy fit with other policies at the implementation site?
Policy outcomes	Does the policy have unintended consequences?
	In whose interests does the policy actually work?
	Is this a significant material or symbolic policy in terms of outcomes?
	Has the policy had material effects or largely discursive ones?
	How does this policy fit with other cognate policies within education and across government?
	Will the policy achieve its goals and objectives? (Policy evaluated against its own goals and framework)

	What are the social justice effects of the policy? (Policy evaluated against some articulated ideal)

Look, read and match
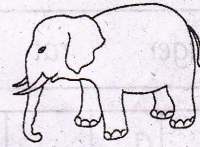
Pig and goat

Grass and leaves

Apple and maize

Grass and trees

Bananas

1

Look at the picture and write

Karma was a baby _____

He ha_ a short _____

He w_____ to a _____

He looked _____ the house.

There w _____ lots of _____

in the _____ .

Look for seven animals word

c	u	m	h	i	v	w	q	c	u	m
x	h	o	r	s	e	z	r	x	h	o
b	k	n	h	l	b	g	a	b	k	n
l	t	k	t	y	e	o	p	l	t	k
e	l	e	p	h	a	n	t	e	l	e
o	a	y	s	i	r	k	i	o	a	y
p	e	l	m	z	p	n	g	p	e	l
a	s	d	o	g	f	d	e	a	s	d
r	g	j	l	o	p	x	r	r	g	j

Write the names of the animals here.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Finger printing

Deep your finger in green colour and colour the grapes.
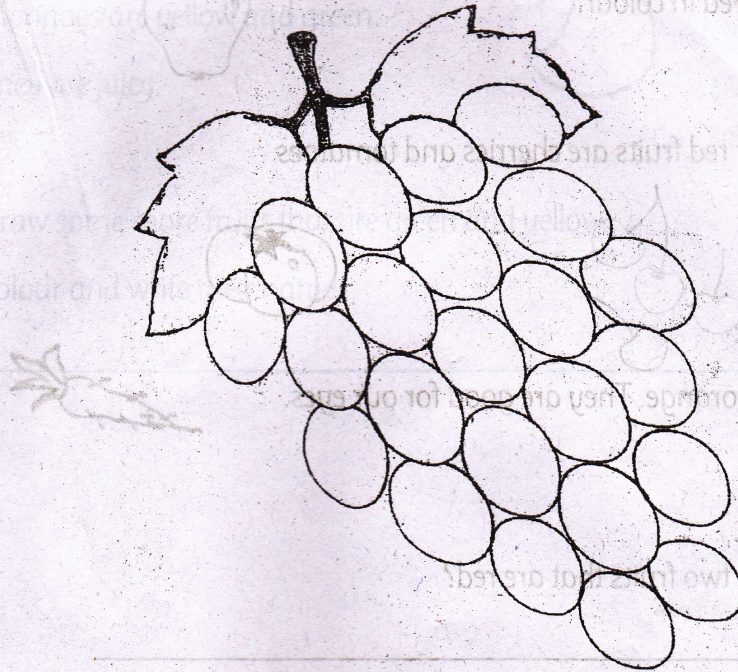
1. What are these?

   _____

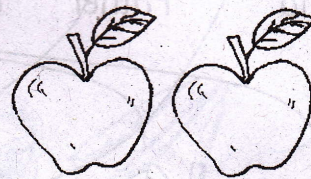2. What colour are they?

   _____
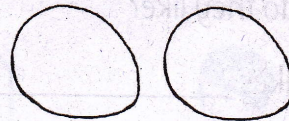
13

250

Read and complete the sentences

This is a bean.

These are bean

This is an _____

These are _____

This is an _____

These are _____

This is a _____

These are _____

22