The Spread of Montessori Education in Mainland China

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Abstract: This paper is a historical account of the spread of Montessori education in mainland China. It surveys the general picture of early childhood education (ECE) in China and discusses the factors leading to the popularity of Montessori education in the 1990s. Although first introduced into China in the early 1900s, for reasons explained, Montessori education was unsuccessful in catching on as an education method in the early part of the 20th century. Following policy changes and growing interest in western education methods, Montessori education reemerged in the 1990s and has remained a sought-out education method since. In this paper, localization is also discussed as a prominent concern expressed in the Chinese research is ensuring Montessori education promotes and instills values consistent with Chinese society. As is shown, elements of the Montessori method are consistent with Chinese culture, creating a cooperative relationship between these two systems. Of equal importance, Montessori education emphasizes the cultivation of collective identity and societal relationships similar to Chinese culture, the slight difference between them being that Montessori also emphasized the construction of the individual as well.

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Introduction

If it were possible to sum up China’s education history in one word, it would be change (Liu, 2010). This includes early childhood education (ECE), which has experienced frequent change since the first preschool opened in mainland China in 1903 (Feng, 2017). As a developing nation, China has routinely reevaluated ECE practices to keep up with research-based methods for educating its youngest citizens and ensuring methods suitable to the nation’s cultural and social values. One such method used is the Montessori method.

The Montessori education method is the educational philosophy and method designed by Maria Montessori of Italy in 1907. It was first introduced in China over 100 years ago yet remained underdeveloped until the 1990s.
and 2000s. This paper is a historical overview of Montessori education's development in mainland China and answers the following questions:

1. What is the historical account of the development of Montessori education in mainland China?
2. What circumstances influenced Montessori education's acceptance and spread in mainland China starting in the 1990s?
3. What are the concerns over the localization of Montessori education in mainland China in the 21st century?

Considering that China has the most Montessori preschools of any nation (Song, 2019; Whitescarver & Cossentino, 2008), information on its development and concerns surrounding it is of interest in sharing how Montessori education in China came to be.

The historical account in this paper “attempts to systematically recapture the complex nuances, the people, meanings, events, and even ideas of the past that have influenced and shaped the present” (Berg & Lune, 2012, p. 305). As discussed by Berg and Lune (2012), steps for conducting historical research have been followed to develop a narrative of the historical development and spread of Montessori education in China while connecting this development to localization. Localization is the process in which a concept or idea adapts to become suitable to the needs of the local culture, place, or time and is a repeated concern surrounding Montessori education in mainland China (Deng et al., 2016; Huo, 2001; Liu & Lin, 2003; Tian, 2007; Tian, 2008; Tian et al., 2014; Wang, 2012; Yang 2002, 2004).

The first section addresses Montessori education’s arrival in China in the early 1900s, including the educational and national climate at the time. The second section describes the development of ECE in China post initial interest in Montessori education and develops the story of what led to the widespread acceptance and implementation of Montessori education in mainland China in the late 1990s and early 2000s. Lastly, concerns surrounding localization are discussed to explore Montessori education’s applicability in mainland China in the 21st century.

Montessori Education’s Arrival in China

The earliest published record on Montessori education in mainland China is from 1913 by Chinese scholar Zhi Hou (志厚). Zhi Hou was an educational scholar in the early 1900s, active in translating international education theories into Chinese for publication and introduction in mainland China. Zhi Hou’s first article, titled “Ms. Montessori and her Teaching Method,” praised Montessori’s educational theory while describing her teaching instruments, theory, and classroom characteristics (Shi, 2012; Tian, 2007). In his article, Zhi Hou also expressed genuine respect for Montessori, which is evident in the title he gave to her. The original address Zhi Hou used in Chinese is 女史 (nv shi). The title contains the character female (女) and the character used to describe an important member of the king’s advisory council (史). Upon reading this title, readers would instantly feel reverence and esteem for Montessori and her theories as the title bestowed her associated her with the intellectual advisers surrounding the emperor (personal communication, former Zhejiang University professor of education, Liu Hua, October 22, 2020).

Montessori education initially stirred great interest in mainland China, which resulted in over 20 articles published from 1913 to 1928 on Montessori education (Shi, 2012, 2015; Tian, 2007). Considering the national condition of China in the early 1900s, primarily rural and delayed in technological advances (Gu, 2014), and the cost and scarcity of publications (Tian, 2007), it is evident that Montessori education received a significant amount of resources and attention in the early years. These publications were written by bilingual scholars who had studied Montessori’s writings in Italian, English, and Japanese and the handful of scholars who physically traveled to Italy to visit and observe Montessori’s schools (Lau, 2017; Shi, 2012, 2015). Some of these publications even included pictures of Montessori classrooms and teaching apparatus, which was quite extraordinary considering the rarity of pictures at that time (Shi, 2012).

As early as 1914, one of the first institutions to research Montessori education in China, the Montessori Institute of Education, was established in Jiangsu Province (Liu & Lin, 2003; Shi, 2012, 2015; Wang, 2012). Specific purposes put forward by the institute included exploration of sinicization (中国化) and localization (本土化) of the Montessori method, as well as an evaluation of the Montessori materials to see if it was possible to make them locally (Shi, 2015). Sinicization and localization are two terms used in China to address the process of adapting a concept or a method not originating in China to China’s cultural, economic, social, and national context (Choy, 2017). As modern Chinese education scholar Gu Mingyuan (2014) describes, a critical function of education is to spread, select and transform culture, which only
naturally implies that an education system is evaluated and assessed for its within a nation's culture, economy, and social values. Not only is assessing for important, but as Ho (2017) describes, it has remained critical to Chinese educators to recognize that western education practices are not to be taken as the standard for ECE, but as a reference point to adopting culturally sensitive and nationally appropriate methods. With localization and sinicization in mind, the Montessori Institute of Education sought to explore how to apply Montessori education within a Chinese construct to achieve contextualization.

According to the research conducted at the Montessori Institute of Education, educators and researchers quite early on developed a skeptical opinion toward Montessori education. One expressed reason for this skepticism is that researchers could not reproduce the Montessori materials, making Montessori education reliant on imported teaching materials (Duan, 2016; Lau, 2017; Shi, 2012, 2015). Reliance on imported teaching materials was an unrealistic expectation for China in the early 20th century. Jiang Minglin, secretary of the Ministry of Education in the 1930s, reflects this concern in his response to Montessori's invitation to send teachers to Rome for training:

> Your materials are varied and expensive; it is not quite economical to utilize throughout our country. Chinese pedagogy focuses on designing educational materials that pertain to real-life living without the need to purchase teaching materials (translated from Lau, 2017, p. 66, 245).

Seen as heavily dependent on expensive, imported materials, Montessori education was deemed incompatible for China in the early 20th century. Tagging onto the expense of Montessori materials, Chinese educators lacked sufficient knowledge of the method to implement Montessori education authentically, and there was also question surrounding how reading and writing should be taught according to Montessori principles, considering the difference between the Chinese language and Italian, or any other alphabet-based language system for that matter (Shi, 2012, 2015).

Another likely reason Montessori education experienced a decrease in acceptance in the early 1900s is in connection to educator William Kilpatrick's publicized criticism toward Montessori education (Kilpatrick, 1914). In 1914, Kilpatrick, a U.S. educator, wrote a critique of the Montessori method, questioning its claim as a scientific teaching method that negatively affected the method's acceptance throughout the world (AMS, 2020; Beck, 1961), including China (Shi, 2012, 2015; Wang, 2012). Adding to Kilpatrick's censure is the fact that influential Chinese educators of the early 1900s, namely Chen Heng, Tao Xingzi, and Jiang Mengxue, were all students of John Dewey at Columbia University in the United States (personal communication, Zhejiang University professor of education, Liu Hua, October 22, 2020), as was Kilpatrick (Thayer-Bacon, 2012). Having learned Dewey's pragmatism theories, Chen Heng, Tao Xingzi, and Jiang Mengxue not only felt more proficient in Dewey's theories but probably also felt a degree of loyalty to Kilpatrick, with whom they undoubtedly interacted at Columbia University. Some, therefore, believe that Montessori education in China was not well received in the early 20th century, not only due to logistical concerns surrounding reproducing Montessori materials but also due to possible loyalty by leading educators at the time to the educational philosophies and teachers they had been exposed to at Columbia University, namely William Kilpatrick and John Dewey (personal communication, former Zhejiang University professor of education, Liu Hua, October 22, 2020).

By the late 1920s, Montessori education was practically non-existent in China and would remain in such a state for about fifty years when a new generation of educators would rediscover the method and reawaken its appeal to the Chinese nation.

The period of 1919 to 1978 in China saw a series of changes in sociopolitical ideologies that adversely also resulted in changes to the education system. Before discussing how Montessori education returned in popularity in mainland China in the 1990s, it is vital to understand the internal changes and challenges that took place within China in the 20th century as these historical circumstances influenced not only Montessori education's development in China, but ideologies, systems, and values of the Chinese education system in general.

### Development of ECE in China

At the time of Zhi Hou's first article introducing Montessori education in 1913, ECE services had been in existence in China for around ten years (Zhu & Wang, 2005) and were strictly reserved for young children of elite families (Feng, 2017). This changed, however, in 1919, when China experienced both cultural and political reform as a result of an important event known as the May 4 Movement. The May 4th Movement led the nation to many reforms, including reforms in education, opening
educational opportunities to all social classes. The May 4 Movement also brought women into the workforce, increasing the need for childcare and educational opportunities for young children (Li et al., 2016).

To promote ECE accessibility and equality to all children following the May 4th Movement, Chinese educators labored to support working families by developing preschool programs within factories and near places of employment (Yang, 2017; Gu, 2014; Wang, 2012), making ECE services convenient and affordable (most programs were free) (Li et al., 2016). Simultaneously, educators developed preschool programs that had “Chinese characteristics” (Yang, 2017), meaning preschool programs supported, promoted, and reflected Chinese values and identity, as it had been seen that preschools previously were heavily concentrated with western culture and ideology instead of Chinese cultural values (Wang, 2012). Chen Heqin spearheaded ECE efforts, creating the slogan: “learn to be a person, learn to be Chinese, learn to be a modern Chinese person” (学做人, 学做中国人, 学做现代中国人), which means, one must learn the necessary skills to be independent (“be a person”), which includes teaching the elements of the culture (“be Chinese”) that will lead the person to become a contemporary member of their community (be a modern Chinese person) (Wang, 2012).

Chen Heqin also developed an educational philosophy resembling Dewey’s pragmatism theory called “living education,” stressing the importance of active participation on behalf of the child in the education process. Quite different from traditional Chinese education that focused on the upholding and memorization of Confucius teachings (Gu, 2014), Chen Heqin emphasized the importance of instilling good habits, manners, and skills for independence as the main goals of ECE (Wang, 2012). Chen Heqin’s theories eventually became the standard for ECE in China until the founding of the People’s Republic of China (PRC) in 1949, which again brought about another dramatic change to China’s education system altogether.

The founding of the PRC brought a series of transformations to the education system, including ECE, as Marxist educational ideologies were adopted throughout the whole education system, promoting the idea “that education [...] cannot] separate from the development of politics, and the economy” (Gu, 2014, p. 178). This means that politics and the economy are involuntarily connected to education, as education is seen as the vehicle to promote and maintain the state’s political agenda. As a new communistic government, China sought help from the Soviet Union with the hope that China could adopt a similar education system promoting Marxism-Leninism beliefs (Zhu, 2009; Zhu & Wang, 2005) and that by doing this, China would progress politically and economically as a nation (Gu, 2014). With the help of “Russian ECE experts, the Ministry of Education drafted the Kindergarten’s Temporary Curriculum (Draft) and Kindergarten’s Temporary Teaching Outline (Draft)” which deemed the subject-based curriculum model the model for the country and banned all other ECE methods, including Montessori education (CNSECE, 2003).

Unfortunately, the Soviet Union’s education system did not reflect developmentally appropriate teaching methods suitable for preschool-aged children. Where previously ECE reflected Chen Heqin’s theories of “learning by doing” (Wang, 2012), educational methods under the PRC were subject-based, didactic, and made children passive in the education process (Zhu, 2009). Nevertheless, during this period, from 1949–1957, preschool education expanded and saw an increase in programs and teacher training institutions, all with support from the Soviet Union.

Following this period, from 1958–1977, China “went through a series of political turbulence, notably the ‘Great Leap Forward’ (1958–1960) and the ‘Cultural Revolution’ (1966–1977)” (Li et al., 2016), radically influencing the education system once again. Due to political instability, preschool programs and many other educational institutions were closed down, leaving many children without educational opportunities.

Following these two historical periods, ECE experienced another renaissance from 1978–1993, following China’s move to a market economy, of en referred to as the “opening up” (Choy, 2017; Qi & M. Elhuish, 2016), that led to a flood of western education philosophies and pedagogies into China. The spread and interest in western educational philosophies in China during the 1980s provided the appropriate conditions for Montessori education to reemerge in the 1990s and 2000s because, as a society, educators and parents were growing in awareness of developmentally appropriate education methods of which Montessori education of ered.

In 1994, ECE received another setback when the central government cut off funding to ECE programs due to national budget cuts (Li et al., 2016; Zhou, 2011). Local governments at the provincial and city-level became responsible for funding public ECE programs, reducing public programs by a large margin. A dramatic decrease in public services took place from 1994 to 2009 as China adopted the policy of “Walking with Two Legs” (两条腿
The Reemergence of Montessori Education

The rediscovery of Montessori education in mainland China can be attributed to Beijing Normal University (BNU) professor Lu Leshan who started compiling information about Montessori education in the 1960s following her return to China from studying in Canada. After Lu’s re-introduction of Montessori education, a new appreciation for the method transpired, leading to a dramatic increase in Montessori preschools, teacher training, and research (Lau, 2017; Yu, 1998).

BNU professor Lu Leshan is known in China as being the forerunner of the modern Montessori movement. In 1985 Lu published Montessori Early Childhood Education (蒙台梭利的幼儿教育), highlighting Montessori’s education philosophy and rekindling interest in the method. Following Lu’s footsteps, BNU professor Liang Zhishen founded the first experimental Montessori classrooms in 1994 in Beijing with support from the Montessori Education Research Foundation (MERF) of Taiwan and two donated sets of Montessori materials from Shan Weiyu of MERF. These were the first complete sets of Montessori materials in China, allowing teachers and researchers a better opportunity for understanding and studying the Montessori method (Lau, 2017).

Shortly after the cooperation between BNU and MERF, plans were announced to begin Montessori teacher training courses through BNU. In 1998 Comparative Research Journal published a one-page article titled, “China Montessori Teacher Training Program Launching Ceremony and ‘Montessori Education in China’ Seminar” (Yu, 1998). In this brief article, plans are shared concerning Montessori teacher training to begin at BNU in conjunction with support from the American Montessori Society (AMS). The article states the goals of the training as follows:

A considerable number of kindergartens in China have begun to use the Montessori education method[…] The problem of combining the Montessori education method with the national condition is of great importance. Society urgently needs an authoritative Montessori teacher-training program to teach, train, guide, and help [educators] improve the quality of Montessori education (Yu, 1998 translated).

In the late 1990s, with enthusiasm over Montessori education came the concern over how to combine Montessori education with the “national condition” of China. This concern is reminiscent of the early 1900s when Montessori education was first introduced to mainland China and educators were trying to discover how to institute it within a Chinese context. Yu (1998) states the solution rests in establishing an authoritative Montessori training program that would be authentically Montessori and characteristically Chinese. This would ensure culturally and nationally sensitive concerns would be addressed appropriately while remaining faithful to the Montessori method. Recognizing the need for assistance from a more developed organization, the AMS was singled out to help organize this effort due to the AMS’s success in localizing Montessori teacher training in the United States and their commitment to helping Montessori education localize in other nations as well (Povell, 2010; Rambusch, 1962; Ungerer, 2016).

By the late 1990s and early 2000s, Montessori preschools continued expanding in China, leading to increasing demand for Montessori teacher training. In response, the two leading Montessori organizations globally, the Association Montessori Internationale (AMI) and the AMS, established Montessori teacher training in China in the 2000s. The AMS held their first diploma course in 2005 at Etonkids Montessori Training Academy in Beijing (personal communication, Montessori & More founder, Jemina Villanueva-Valle, February 2, 2019), while the AMI, the organization Montessori founded in 1929, held the first official AMI
special issue September 2024

32

Journal of Montessori Research    Special Issue September 2024

accepted and spread within the society. How to address
the extent and effect to which Montessori education is
Montessori education, as localization directly determines
a significant factor when reviewing the historical account of
Chinese cultural and educational needs. This is a sig-
literature is how Montessori education is localized to fit
growing popularity, a recurring issue found in the
classroom (Yang, 2004; Liu, 2010; Tian, 2007; Wang,
Tian et al., 2014, Wang, 2012; Yang 2002, 2004). Dif
erent from localization concerns in the early 20th century
that were more technical (how to manufacture materials
and how to teach Chinese writing), concerns of today are
more philosophical in nature. Researchers today state that
Montessori education originates from a different time,
place, and culture than China, philosophical elements of
the method need to be taken out or adapted to fit a modern-
day Chinese context. Understanding the elements of
analysis approach, which states that the development and
use of an education system reflects the cultural context
from which it came (Gu, 2014), it cannot be denied that
the climate in which Montessori education emerged
played a role in its foundations. Wang (2012) writes
ignoring the cultural context from which Montessori
education originates and blindly implementing it without
considering the national condition of China is like “root-
ing children in foreign soil” and educating them “to solve
western problems”.

As previously stated, when the PRC adopted Mar
xist education ideology in 1949, it specified that education
and government went hand in hand as education would
be the vehicle by which cultural values and the state’s
agenda would disseminate (Gu, 2014). As a socialist
country with “Chinese characteristics” today (Choy,
2017), this use of education is still in place in China, and
the argument for how Montessori education conforms to
this particular usage of education remains at the forefront
(Huo, 2001; Tian, 2007; Wang, 2012).

The main concern surrounding how to localize Montessori
education is how to ensure Montessori education’s place
within ECE practices in China and its potential for influence in the 21st century.

Localization of Montessori Education in China

Chinese research on Montessori education continues
to discuss the topic of localization and sinicization
(本土化，中国化) (Deng et al., 2016; Huo, 1999,
2001; Liu & Lin, 2003; Tian, 2007; Tian, 2008; Tian et
al., 2014; Wang, 2012; Yang 2002, 2004). Different from
localization concerns in the early 20th century that were
more technical (how to manufacture materials and how
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education system in China and it is essential that Montessori education possess and promote these beliefs as well.

**Fostering Chinese Moral Values**

Localization concerns as stated in the research surrounding the assumption that as a western education method, Montessori education does not respectively promote Chinese moral values, patriotism, or admiration for traditional Chinese culture (Deng et al., 2016; Huo, 1999, 2001; Wang, 2012; Yang, 2004), which are all fundamental functions of the education system in mainland China (Choy, 2017; Gu, 2014). Counter to Chinese culture, Yang (2004) writes that Montessori education promotes western values such as freedom of thought and action, development of the individual personality, and values each individual's unique ideas, where Chinese culture promotes modesty, restraint, submissiveness, and obedience (Choy, 2014; Yang, 2004).

The moral values of Chinese society are directly connected to Confucian ideology (Choy, 2017; Gu, 2014) and are at the forefront of Chinese culture, including Chinese education culture (Gu, 2014). Huo (2001) and Yang (2002, 2004) state that since Montessori was Catholic, Catholic ideology is inherently woven into the Montessori education system and before implementing the Montessori method, religious elements must be removed before it can be appropriately applied in China.

China is not the first nation to express concern over the religious undertones found in Montessori’s writings and philosophy. AM S founder Nanci Rumbusch also dealt with concerns over religious ideology when localizing Montessori education in the U.S. While at first Montessori education in the U.S. was predominately adopted by families of the Catholic faith (Povell, 2014), Rumbusch sought to remove Montessori education’s association to the Catholic religion, as the method is ultimately designed following rules of human development and applicable to all children. Maria Montessori, Maria Montessori’s son, supported this, stating, “The Montessori method is like a medicine—there is no Catholic medicine” (Povell, 2014, p. 154), implying the universality of Montessori education for all children, not just children of a particular faith.

As a scientific pedagogy (Montessori, 2012), Montessori education is not limited to religious or culturally specific contexts. Montessori’s theories of development apply to children of all backgrounds regardless of religion as it is based on the fundamental laws of human development as observed by Montessori. Including China that possesses its own cultural principles, Montessori education is an applicable pedagogy as its fundamental philosophies are designed according to developmental characteristics universal to all children. Montessori writes, “The art of education must become a service to these powers inherent in all children. It must be a help to life” (Montessori, 2012, p. 18). These inherent powers she speaks of are what Montessori termed sensitive periods—stages of development universal in all children that lead children to acquire specific skills or abilities essential to life. Sensitive periods and other critical components of Montessori’s developmental theories are founded on truths of human development, making the Montessori philosophy applicable to all children from all backgrounds.

**Building Collective Identity**

Emphasis on social relationships and cultivating collective identity are also explicitly stated concerns surrounding the implementation of Montessori education in China (Deng et al., 2016; Yang, 2002, 2004). Chinese culture is at its core a collectivist society, and social relationships are the basis for the functioning of the society (Choy, 2017). Yang (2002, 2004) questions whether children in Montessori classrooms cultivate collective identity seeing that in Montessori classrooms, children spend more time working independently from each other and the teacher than is typical in non-Montessori schools. It is suggested that in this way, children are not given adequate opportunity for social and emotional growth as most time is spent silently working alone. Deng et al. (2016) also highlight this aspect and suggest Montessori classrooms localize by holding more group lessons and whole-class activities to aid in the cultivation of a collective identity.

Yang (2002, 2004) and Deng et al’s (2016) perception of this issue stems from a misunderstanding about Montessori education as Montessori did emphasize the importance of social relationships amongst the children, socializing being the basis for these experiences. Consideration for the group and understanding one’s role as a member of the group is what Montessori described as the highest awareness in social development as children learn about themselves and their relationship to the group, and for the harmony of the group, will put other’s needs and the group’s needs above their own. She saw that what she called “normalized” children (children who exhibit self-controlled, purposeful, organized behavior) think about themselves in relation to the group in the classroom and make choices that not only benefit themselves but
that reflects an understanding of the classroom society (Montessori also used the phrase “spirit of the family of the tribe,” Montessori, 1967/1995, pg. 232). It happens through the children’s daily experiences interacting with each other, caring for each other and the environment, solving social problems together, learning to wait, and learning from each other. In Montessori classrooms, exercises and experiences that cultivate a collective identity happen daily as children participate in the classroom society.

As can be seen, Montessori education does uphold values associated with a collective identity, the only difference being in the organization of the experience. While in non-Montessori classrooms, it is perceived that social cohesion comes by keeping the children together as a group, Montessori believed social cohesion was the result of interactions amongst the children. Children in a Montessori classroom take part in their own society and learn to cooperate and help one another.

Simultaneously, Montessori was clear that the development of the individual was of equal importance. Montessori writes, “Individuality is the basic unit, the fundamental building block of a society, which is made up of many individuals, each functioning autonomously but associating with others for the common purpose” (Montessori, 1999, p. 55). What Montessori is highlighting here is the importance of the development of the individual so that the child may have a contributing role within his society. While Chinese culture and education may emphasize collective identity more so than the individual, Montessori saw these two developments as complementary and of equal importance. It can be seen in the Montessori classroom as children help one another and care for one another, yet progress in the Montessori apparatus according to their individual developmental needs (Montessori, 1967/1995).

While Chinese research expresses caution and concern when implementing Montessori education to ensure cultural, societal, and national integrity, as can be seen, elements of the method naturally share values consistent with the Chinese nation, creating a harmonious relationship between the two. Considering that Montessori education is based on human development principles, the essence of the method remains intact when religious ideologies are removed. Thus, Montessori education does operate within a Chinese context. Finally, Montessori education does emphasize the importance of societal relationships, the slight difference being the duality of cultivation of the self as well as the society, for a balanced, agreeable reality.

Conclusion

Montessori education has been an advancing educational philosophy in mainland China since the 1990s and enjoys popularity today. Considering the overall historical account of ECE in China, Montessori education has benefited from a series of ECE policies supporting the privatization of ECE programs resulting in curiosity toward western ECE ideologies in the 1980s and 1990s.

Simultaneously, aspects of localization need to be addressed and understood in order for Montessori education to continue to spread in mainland China in the 21st century. One of the primary goals of ECE in China is the transmission and cultivation of cultural values. As has been presented, Montessori education does share principles cohesive with Chinese culture. In order for Montessori education to continue to appreciate recognition within China, it is imperative that Chinese Montessori researchers grasp a deeper understanding of Montessori principles and practically implement a Chinese-centric Montessori program that supports child development according to Montessori philosophy that also identifies with and prioritizes a Chinese identity and perspective.

Competing Interests

The authors have no competing interests to declare.

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