LHA1825: Comparative Education Theory and Methodology  
Autumn 2014, Tuesday 13:00 – 16:00  
Ontario Institute for Studies in Education  
University of Toronto

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Office Hours: By appointment – please email to schedule a meeting

Purpose of the Course

This course is intended as an introduction to the field of Comparative Education, including the various academic schools that have emerged and the literature linked to such international organizations as UNESCO and the World Bank. We will also see a film entitled “Comparatively Speaking” which features presidents of the Comparative International Education Society of the USA, including three OISE professors.

The course was developed in the mid-1980s, and first taught in 1986. It has been taught at OISE fairly regularly ever since. It is can be seen as a kind of intellectual history of the field, with the different schools or paradigms presented in a roughly chronological way. The intention is to trace changing approaches to Comparative Education research over time, and link them to wider debates in the literature of the social sciences. It is also to reflect on the connection between theoretical paradigm and research methodology. The roots of the course go back to the ideas and methodology of Professor Brian Holmes at the University of London Institute of Education, one of the leading figures in the development of the field. The course has been updated and changed a number of times, but the original framework and many of the core readings have been kept, in order to maintain this link to history. Sessions that have been added in recent years include Session 7 on Comparative Education and the Postmodern Challenge, Session 8 on Globalization, International Organizations and Comparative Education, Session 9 on Policy Borrowing, Globalization and Comparative Education and Session 11 on mixed methods in Comparative Education. For session eleven, Dr. Anne Wong will serve as our guest lecturer.

Students are encouraged to focus their attention on such fundamental questions as the purpose of Comparative Education, the views of social change that underlie different approaches to Comparative Education and the question of what "scientific" methodology entails and whether or not it should be a goal in Comparative Education research. By the end of the course students should have developed their own critical perspective on the various paradigms found in the literature through careful reading and sustained thought and discussion.

Class Format:

Class sessions will involve brief lectures, elaboration on the common readings, some small group
discussions and student presentations from the additional reading list.

**Student Assessment and Evaluation:**

Two short papers (400-600 words or 1-2 typed pages) should be prepared for class presentation and handed in during the term. The first will be a brief critical summary of an additional reading, either an article or book (chapter) that relates to one of the paradigms under consideration. This will be presented in class at the appropriate session, and will be due to be handed in by **mid-October**. The second will be a summary of one or several items from the additional readings, or freely selected from the wider literature in consultation with the instructor, that may be used in preparing the final research paper. When presenting this short paper in class, the student is encouraged to get feedback on their tentative thinking for the final research paper. The paper is due by the end of term. These short review papers will make up 30% of the final mark. 70% will be based on a final research paper of 3-4,000 words (15-20 typed pages). Students may choose their own topics in consultation with the instructor and the paper will be due in later December.

In evaluating the final research paper, I take several things into consideration: the clarity with which you have presented your topic or theme, the originality of your argument, the range and appropriateness of the reference materials you have drawn upon, the degree to which your paper achieves a thoughtful analysis and makes a coherent presentation of your argument, and/or your findings. Let me try to give you a sense of my approach to grading: **B** is a basic pass mark, while **B+** is awarded for acceptable and solid work; **A-** is for work that achieves considerable clarity of argument and richness of thought; **A** is for work that is excellent in terms of coherence of the analysis, and the thoughtful use of the reference materials drawn upon. **A+** would be for a paper that I judge might be acceptable for publication in a refereed journal in the field. The final mark for the course is reached through a careful consideration of both your research paper and your two short papers and their presentation in class.

**Expected Learning Outcomes:**

At the completion of this course, successful students will be able to demonstrate their learning by explaining and distinguishing several basic theoretical approaches in the field of Comparative and International Education, which may include positivism, interpretivism, the problem approach, critical approaches and postmodernism, among others. Students will also be able to connect those theoretical paradigms with corresponding research methodologies and methods. In addition, they will be capable of critiquing theoretical literature in the field, within the wider context of debates in sociology, history or philosophy. Above all, students will be able to develop a conceptual/analytical framework, based on a particular theoretical paradigm in the field, and use it in their final paper and in future research investigation.

Beyond their cognitive learning, it is expected that all students will be strengthened in their ability to communicate clearly and logically about theoretical concepts and issues concerning comparative and international education. Students will be capable of articulating their own opinion in a coherent and defensible way, supported by their increased understanding of the theories and methodologies in the field. Finally, students will be active participants in ensuring a respectful and collaborative class,
grounded in respect for and appreciation of different viewpoints, regardless of their own preferred worldview or theoretical orientation.

**Overview of Course Themes and Topics**

Introduction: The Origins and early development of Comparative education
1. The Historical Approach
2. The Positivist Approach
3. Phenomenological, Ethnographic & Narrative Approaches
4. The Developmental Approach: Neo-Marxism, Dependency Theory and World Order thinking
5. The Problem Approach
6. Ideal Types in Comparative Education
7. Comparative Education and the Postmodern Challenge
8. Globalization, International Organizations and Comparative Education
9. Policy borrowing, Globalization and Comparative Education
10. The Collection and Classification of Statistical Data in Comparative Education
11. A Dialectical Paradigmatic Stance and Mixed Methods in Comparative Education

**Major Influential Books**


Altbach, Philip, *Comparative Higher Education: Knowledge, the University and Development* (Hong Kong: Comparative Education Research Centre, University of Hong Kong and Springer, 2008)


Bray, Mark, Adamson, Bob and Mason, Mark, *Comparative Education Research: Approaches and Methods* (Hong Kong: Comparative Education Research Centre, University of Hong Kong, 2007.)


Gu Mingyuan, *Education in China and Abroad: Perspectives from a Lifetime in Comparative Education* (Hong Kong: Comparative Education Research Centre, University of Hong Kong, 2001).


Holsinger, Donald and Jacob, James, *Inequality in Education: Comparative and International Perspectives* (Hong Kong: Comparative Education Research Centre, University of Hong Kong and Springer, 2008).


Manzon, Maria, *Comparative Education: The Construction of a Field* (Hong Kong: Comparative Education Research Centre, University of Hong Kong and Springer, 2011).


Mundy, Karen, Bickmore, Kathy, Hayhoe, Ruth, Madden, Meggan and Madjidi, Katherine,


Noah, H. and Eckstein, M. Doing Comparative Education: Three Decades of Collaboration (Hong Kong: Comparative Education Research Centre, University of Hong Kong, 1998).


Schriewer, Juergen, Discourse Formation in Comparative Education (Frankfurt: Peter Lang, 2003)


Major Comparative Education Journals

Canadian and International Education (CIE), Comparative Education Review (CER) [USA.], Comparative Education (CE) [UK], Compare [UK] International Review of Education (IRE) [Europe] Prospects (UNESCO)

Session 1: The Historical Approach to Comparative Education (September 16)

Common Readings


Discussion Questions:

1. Compare and contrast the way in which Hans and Kandel viewed the purposes of
Comparative Education.

2. What underlying notions of social change do you find in the historical approach to Comparative Education?

3. Do you find any view of scientific method implicit in the historical school?

4. How has William Cummings applied a historical perspective to his suggested approach to comparative education through what he calls “institutionalism”?

5. How does Cumming’s insistence on understanding historical context enable him to deal critically with many of the widely accepted views of educational convergence, and the effects of globalization on education systems?

Additional Readings


Monroe, Paul, Essays in Comparative Education [New York: Teachers College Columbia, 1927].


**Session 2: The Positivist Approach to Comparative Education (September 23)**

**Common Readings**


**Discussion Questions:**

1. Compare views on the purpose of comparative education in the two positivist
approaches to the field presented in the readings.

2. What underlying notions of social change do you find in these two approaches?

3. What did Bereday mean by making comparative education "scientific"? How did Noah and Eckstein further develop this move towards being more scientific in method?

4. Explore the progress that has been made in the degree of precision and sophistication in positivist scientific method by following the argument in Baker, Goesling and Letendre. What are the benefits of this kind of comparative study? What limitations may it have?

Additional Readings


Torney-Purta, J., Schwille, J. and Amadeo, J. (eds.) Civic Education Across Countries: Twenty-Four National Case Studies from the IEA Civic Education Project (Amsterdam: International Association for the Evaluation of Educational Achievement, 1999).

Websites:

http://nces.ed.gov/timms - for the most recent IEA study on achievement in mathematics and science

www.pisa.oecd.org - for an alternative study of educational achievement in OECD countries

**Session 3: Phenomenological, Ethnographic and Narrative Approaches to Comparative Education (September 30)**

**Common Readings**


**Discussion Questions:**

1. What role does language play in King’s approach to comparative education, and how does this contrast with the scientific approach of Noah and Eckstein?
2. What does King see as the purpose of comparative education, and how does this shape the framework he suggests, which moves from context to concepts, institutions and operations?
3. Compare the approach to "participant observation" suggested by King with the ethnographic approach suggested by Masemann in her 1982 article? How do they differ in their views of social change? What is the importance of the adjective “critical” in Masemann’s approach to ethnography?
4. What new elements does narrative methodology bring to comparative education? Why is it seen as particularly important in a period of globalization?

**Additional Readings**


*King, E.,* *Post-Compulsory Education: A New Analysis in Western Europe* [London: Sage, 1974]


*Masemann, Vandra Lea, “Culture and Education,” in R. Arno and C. Torres, *Comparative*


Stenhouse, Lawrence, "Case Study in Comparative Education: Particularity and Generalization", CE, Vol. 15, No. 1, 1979, pp. 5-10.

Vavrus, Frances and Bartlett, Lesley (eds.) Critical Approaches to Comparative Education: Vertical Case Studies from Africa, Europe, the Middle East and the Americas (New York: Palgrave MacMillan, 2009).


Session 4: The Developmental Approach to Comparative Education: Neo-Marxism, Dependency and World Order Thinking (October 7)

Common Readings


Discussion Questions:

1. What views of social change lie behind the dependency approach to comparative education? What kinds of major problems does it bring to the fore for consideration? How are they different from the problems addressed within positivist or historical approaches?
2. How far might comparative research within this framework claim to be scientific, and on what basis?
3. Which aspects of the dependency framework does McLean find helpful, and which does he suggest may be misguided? Do you agree?
4. What elements in Galtung's suggestions for peaceful research open up the possibility of positive action in relation to global inequalities? How does his approach differ from the
classical dependency/world systems analysis, with its basis in Marxism or neo-Marxism?

Additional Readings


*Carnoy, Martin, Education as Cultural Imperialism [New York: MacKay, 1974]


Epstein, E., "Currents Left and Right" plus Commentaries by Carnoy, Foster, Masemann, Noah
and Holmes, CER, Vol. 27, No. 1, February, 1983.


**Session 5: The Problem Approach to Comparative Education (October 14)**

**Common Readings**

1. Holmes, Brian, “The Positivist Debate in Comparative Education – An Anglo-Saxon Perspective, (Chap. 3) and “A Framework for Analysis – ‘Critical Dualism’ (Chap. 4) in

Discussion Questions:

1. What does Holmes see as the purpose of Comparative Education?
2. In what sense does he try to make Comparative Education research "scientific"? What does Holmes mean by critical dualism and how important is it to the endeavour of making Comparative Education “scientific”, in Holmes’ view?
3. What does Holmes mean by a "problem" in education? How does he draw upon the philosophers John Dewey and Karl Popper to define problems and clarify the steps of problem analysis and solution?
4. How far has Hayhoe followed Holmes’ problem approach in her research journey? How has she deviated from it and why?
5. Why do Bray and Thomas see the multilevel (CUBE) model as an important “analytical tool” in comparative education research? In what way might this CUBE analytical model be used within Holmes’ problem approach?

Additional Readings


**Session 6: Ideal Types in Comparative Education Research (October 21)**

**Common Readings**


**Discussion Questions:**

1. How does Weber define the "ideal type"?
2. What is its importance with reference to problems of scientific method in sociology?
3. How could it be used within different approaches to social change?
4. How is it applied to Comparative Education research by Holmes?
5. How has Hayhoe used ideal types within different paradigms and which use do you find most persuasive?

**Additional Readings**


*Hickling-Hudson, Anne, “Towards Caribbean ‘Knowledge Societies’: dismantling neo-colonial
barriers in the age of globalisation,” in Compare Vol. 34, No. 3, pp. 293-300.


**Session 7: Comparative Education and the Postmodern Challenge (October 28)**

**Common Readings**


**Discussion Questions:**

1. What does Cowen see as the crisis leading to the emergence of late-modernity and its educational patterns? How does postmodernity connect to this?
2. How does Val Rust explain the emergence of postmodernism? What key concepts does he identify and how does he see their relevance to comparative education? What cautions does he suggest for doing comparative education within a postmodern framework?
3. How helpful is Paulston’s map for reflecting on the various theoretical paradigms used in comparative education? Are you convinced by his defence of postmodernity?
4. Which of the five versions of postmodernity, on Paulston’s map (p. 8) do you resonate with most and why?
5. Can you find your own position somewhere on this map, either the modern or postmodern side?

**Additional Readings**

Doherty, Joe et al., *Postmodernism and the Social Sciences* (Basingstoke: Macmillan, 1992)


**Session 8 Globalization, International Organizations and Comparative Education (November 4)**

**Common Readings:**

2. Crossley, Michael and Watson, Keith,  *Comparative and International Research in Education: Globalisation, context and difference* (London and New York: RoutledgeFalmer, 2003, Chapter 4, Globalisation, context and difference, pp. 50-69, 142-171 (References)


**Discussion Questions:**

1. What kind of picture does Elise Boulding give of the potential role UNESCO and other UN agencies might play in the global community? What understanding of social change and culture underlies this vision? What radical changes have taken place in the world community since the publication of this volume? How would they affect the role of international organizations?

2. Why do Crossley and Watson see globalization as requiring a reconceptualization of comparative education? What three conceptions of globalization do they put forth, and how are these related to the issues facing comparative education as a field?

3. How does the analysis of Mundy and Murphy illustrate the role of comparative education in clarifying possibilities for action on the part of educators in an increasingly globalized world? Are there similarities with Boulding’s vision? Differences? How is Mundy’s approach different from the developmental approach discussed in Session 4?

**Additional Readings**


Robertson, Susan, “Re-Imagining and Rescripting the Future of Education: Global Knowledge


**Session 9: Policy Borrowing, Globalization and Comparative Education (November 11)**

**Common Readings:**


**Discussion Questions**

1. What are the main elements of an analysis that Phillips and Ochs see as necessary for a deep level understanding of specific cases of educational borrowing? What role do the disciplines of history and sociology play in their approach? How far do you see them as building on earlier theories or paradigms of comparative education?

2. What main considerations come out of Steinar-Khamsi discussion of the change from bilateral to international frames in policy borrowing under globalization? What role do
international organizations play? Why does she see ‘policy borrowing’ as the most suitable concept for scholars of comparative education, in face of the different terms used in policy sociology and political science?

3. Why do Bartlett and Vavrus insist on qualitative method for understanding policy borrowing under globalization? Why do they develop case study methods into multiple layers and directions? How far does this enable them to move from understanding policy to understanding practice?

Additional Readings


Rui, Y. (2007). Comparing policies: In M. Bray & B. Adamson & M. Mason (Eds.), *Comparative education research: Approaches and Methodology* (pp. 241-262). Dordrecht: Springer, and Hong Kong: The Comparative Education Research Center, the University of Hong Kong.


**Session 10: The Classification and Use of Statistical Data in Comparative Education (November 18)**

**Common Readings**


**Discussion Questions**

1. How does the Mundy and Farrell chapter help you to understand the historical development of statistical data sets and their relation to comparative education as a field?

2. What are some of the dilemmas arising from the new and highly sophisticated sets of educational indicators recently developed and used by OECD countries? How do they differ from UNESCO statistics?

3. What do Cusso and D’Amicob mean by their distinction between comparatism and comparativism?

4. In reflecting on Carnoy’s presidential address and his journey through the major paradigms of comparative education, what strikes you as his most significant contributions to the
field? Which of the paradigm he identifies makes the most sense to you and why?

Additional Readings


International Bureau of Education (Geneva) and UNESCO (Paris), The International Yearbook of Education, 1948 to the present, with some gaps. Website: http://www.uis.unesco.org/


The World Bank Development Report (not all statistics are accessible free on-line, but see the following website for one interesting set: http://genderstats.worldbank.org/eoutcomes.pdf)


Session 11: A Dialectical Paradigmatic Stance and Mixed Methods in Comparative
Education (November 25)

Common Readings


Discussion Questions:

1. What is mixed methods research? Describe the different ways in which it can be a method, a research design and a methodology.
2. How would you define paradigms in research? What are examples of the paradigms that have been proposed for mixed methods research? Discuss the controversies and debates about paradigms in mixed methods.
3. What are some of the mixed methods research designs that are proposed by Creswell?
4. Referring to Bray & Thomas’ (1995) paper, how might mixed methods be applicable to research in comparative education? What are other examples where mixed methods may be considered?
5. How would you evaluate the rigour or validity of a mixed methods study in comparative education?

Additional Readings


