By the end of this chapter the students should be able to:

- Identify the methodologies that have been applied in comparative education
- Apply at least one of the methodologies in solving a particular problem in the education sector.

Methodology in comparative education has been discussed by comparative educationists from the time the discipline was established. Like other social science, comparative education has been studied at different stages of its development with different methodologies. With the interest of scholars from different disciplines in it, the development of methodologies of studies of social science, the expansion of knowledge and interdisciplinary approaches, the interest of the countries of the world in one another and the coming up of bodies like United nations Organization (UNO) and its affiliate bodies like United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations International Children Fund (UNICEF) and International Labour Organization (ILO) different methods have been applied for the study of this discipline. Beginning with the simple narratives of education abroad during the traveller’s tales phase, the discipline’s methodological approaches have progressively evolved into the current...
application of sophisticated methods of the social sciences, which are empirically based. Due to its diverse clientele arising from its multidisciplinary nature, comparative education has failed to develop a single universally accepted methodology of study. As a result it is currently characterized by a multiplicity of debates and opinion of what method is best suitable for use. The father of comparative education, March Antoinne Jullien de Paris, suggested a method of studying comparative education and since then several comparative educationists have suggested alternative methods of studying comparative education.

The debate about methodology of comparative education has been stimulated from time to time by the need to produce valid answers and better understanding of the education systems, theory, practices and problems. It became even more important after the Second World War when comparative education became involved more in finding solution to education problems of the contemporary era. In their efforts to advise nations, countries’ educational systems and institutions, comparativists have sought even more vigorous for the best method to use. The following are the methods that have been used in studying of comparative education and they tend to correspond with the particular stage of development of this discipline:

I) Traditional method
   - Descriptive method
   - Selective education borrowing

II) Social science methodology
   - Historical approach
   - Sociological approach
   - Philosophical approach

III) Conventional methods
   - Systematic study area
   - Problem solving approach
TRADITIONAL METHODS

Descriptive method

From the early times of the discipline development the most noticeable aspect was that of description only. This method had neither any elaborately developed methodology nor system nor details to the roots of the discipline. The method involved simple random descriptions like those of Marco Polo, Hiuen Tsang or Banche and had only some details of educational systems in other countries. Herodotus (484-425 B.C.) in his commentary on Persian wars, Xenophon (430-355 B.C.) in his details of training for citizenship in Persia, are some examples of Greek interest in comparison. Plato (429-348 B.C.) in his Republic talks of improvement in society. Cicero (106-43 B.C.) in De Orator had compared Greek and Roman cultures and blamed Spartan training for encouraging homosexuality and robbery. Julius Caeser (102-44 B.C.) in his commentary on Gallic wars had not restricted himself to warfare and had mentioned that Druids stressed memory and were not willing to commit their religious doctrines to writing. In these early descriptions, mostly the persons who travelled abroad were not basically interested in the educational systems of other lands for any utilitarian purpose but were curious to know the wide world and what people did there. These descriptions could not move beyond subjective interpretations.

Selective education borrowing

The methods involves the comparison of descriptive data in order to inform legislation. Statistics and description formed the basis of comparison. Pioneers in the discipline used this method in the pioneer phase of comparative education.

Their main aim was to facilitate transplantation of education system and to promote understanding among nations through sharing of educational information among them.

This approach calls for the task of educational fact-finding and enlightenment through abstracting educational statistics and presenting them in charts for comparison - e.g. comparison of the organizations and methods of instructions. The approach requires giving of details of other states and foreign systems of education. Some of the materials to be collected may be historical and descriptive.
Experiences may help in the investigation of educational practices in other countries. Thus personal experience allied with social outlook would combine to give one a conclusion about an educational system. This approach involves looking what people in other countries are doing. If, what other people are doing in their countries were done in the home country, on the same principle, then the own education system would be better off. The approach involves stressing positive points of foreign education system so that current weaknesses of the system may be shown up. This is well illustrated by educational borrowing that took place in the early nineteenth century.

The beginning of 19th century coincided with the rise of national system of education in Europe. Travellers abroad made journeys with a specialized interest in educational matters. No longer motivated by general curiosity, they went to foreign countries to discover information useful for charting the course of education in their countries.

This group of persons of modern comparative education was predominantly educational politicians, experts and activists. Often they travelled not at their own expense, or following their private interests, but as emissaries, sometimes self-appointed, of their national government. They concerned themselves with educational theory, methodology, finance and organizations, teachers-training, institutional methods and alternatives to traditionally accepted curricular matters of major importance for them. They borrowed what they viewed to be important in the improvement of education in their country and left out what they viewed to be of little use. This brought about selective education borrowing of aspects that would improve their education system.

Though their reports now focused sharply upon the schools, characteristics associated with traveller’s tales persisted; many of the reports took the form of encyclopedic descriptions of foreign system, perhaps enlightened here and there with anecdotes, but rarely explanatory.

Of necessity objectivity and detachment were lacking. These educational emissaries committed as they were, to the cause of education in their own countries, they mostly saw and reported from abroad merely what they judged would advance their domestic enterprises at home.
Characteristics of this approach

- It is mainly descriptive, eulogistic and governed by the utilitarian purpose of assisting national development of education based on certain values governing the improvement of education.

- Conscientious comparison, which may be expressed in definite terms acknowledging national differences, was lacking.

Application


ii. Government may ask an individual in the country to set up a commission/panel to look into the reform aspect in the system of education. Members of the commission would study what happens elsewhere; select those features they think may help in the reform. They would put forward suggestion for reform and plan development for the institution and system of education. For example the Koech, Ominde, and Gachathi commissions.

iii. Government may send officials to another country to study a particular kind of institution with the objective of setting up a similar kind of institution. The government may want to transplant aspects of education from a specific country for example institutes of technology, village polytechnics from Russia, China, Japan.

iv. A specialist in a country may be given the task of collecting information on foreign improvement in education, for example use a member in the ministry to collect information and stock it locally for use. He would send questionnaires and circulars to embassies asking for information about various aspects of existing systems of education, which may be useful in school reorganization at home.

v. Government may send individuals to study the work of an expert or specific institution where the expert works, for example to study the aspect of early childhood education, adult education.
Problems of this approach

This approach has several shortcomings among them are:

i) The problem of the reliability of the data collected, especially inaccuracy of local records and imprecision of the technical terms when translated to other national context.

ii) The data need to be evaluated on the basis of each country for example the amount of money used in a county cannot be used to compare different countries due to other factors involved e.g. high population.

iii) Valuable comparisons of education system have to consider social influences on the policy and its consequence.

iv) Political rivalry and economic competition among nations encourage imitations but national sentiments discourage it. For example the issue of 8-4-4 system of education in Kenya was faced with the problem of education specialists arguing against its implementation while politicians supported it.

SOCIAL SCIENCE METHOD APPROACH

Under this approach several methods linked to the various social science disciplines have been brought forth. The development of social and behavioral science vastly expanded options for carrying out educational research. Various scholars from the different disciplines have argued in favour of their area of specialization being used in comparative education. The vast methods available were found applicable to the study of Comparative Education. The result of this linkage to social science meant that trends in the parent discipline shaped comparative education. The following are the methods that fall under this approach:

Historical method

This method involves the search for causes and effects. It pursues antecedent causes of educational policy. In the use of this method it is assumed that the practice, device, methods, organizations- all details which go to make up an educational system cannot be transferred intact from one environment to another. The education practices are to be adopted and not assimilated. To adopt a practice requires that there
be an understanding of the cause of its existence. The pursuit of historical approach motivates the desire to discover causes of education practice and to establish laws of education and a science of education. In the historical method we try to understand all those geographical, social racial, political, religious and linguistic factors, which influence the educational systems of a country.

In the 20th century, the historical approach was proposed by people like Isaac Kandel, who argued that the objectives of the comparative approach to problems in education is in the analysis of the causes which have produced then and the underlying reasons across various education systems.

The causes were to be found in the forces and attitudes governing social organization and the political and economic conditions that determined its development. Nicholas Hans has distinguished religious, linguistic, geographical, racial and political factors to historical causes.

Friedrich Schneider included the national character, culture, foreign influences and development of pedagogy itself. Horace Mann tried to reconcile those who advocated the historical approach only with those who includes other factors. He emphasized that the past could not be changed and the future held infinite possibilities. The future was then the field of action, the past is only valuable as a furnishing light by which that field can be more successfully entered and cultivated.

Assumptions of this approach

The following are the assumptions that are applied when using the historical method of collecting data in the field of comparative education:

i. Education practices, devises, methods, structures and organizations are not transferable intact to different education environments adaptation is vital.

ii. Education problems are generally universal but their nature is usually particular to a situation. That is an effort to make comparison between countries. Stress must be on certain factors like political, social and cultural that shape the character of educational systems. Thus as Michael Sandler emphasized, "things outside the school are even more important in determining
the theory and practice in an education system." This approach analyses the cause of similarities and divergences and is expected to expose the necessity of understanding the forces that influence any education system.

**Steps**

The following are the steps that could be followed when using the historical method in collection of data for comparative education:

i. Study each national system separately in its historical settings and its close connection with the development of national character and culture.

ii. Collect data of various systems across national border, bearing in mind the importance of being aware of the differences in terminology, classification and methods of gathering the data between countries.

iii. Analyses the factors or the forces historically responsible for creating differences between the educational systems. Nicholas Hans, for example, distinguished the following factors:

a. Natural factor
   - Race
   - Language
   - Environment

b. Religious factors
   - Catholicism
   - Anglicanism
   - Puritanism
   - Muslim

c. Social factors
   - Humanism
   - Nationalism
   - Socialism

**Shortcoming of historical method**

i. One of the great limitations of the historical method is that the data on which we base our study may not be reliable because in
the collection of data, due care is not observed. Therefore the conclusions derived cannot be very useful.

ii. The historical materials about educational systems of various countries are generally not reliable. This limits the utility of the historical data. Hence more research is needed for making them reliable.

iii. Another difficulty with the historical method is that historians generally are not impartial in their accounts. They want to conceal undesirable elements about the history of their own country and look on facts relating to other countries with prejudice. Thus the truth is not known and we cannot reach the right conclusions.

iv. Lastly in the historical method, the past is unduly emphasized. Thus the study of comparative education becomes unbalanced.

**Sociological/analytical explicative**

In the sociological method the educational problems are studied in a social context. This is done with the belief that the educational system of a country is conditioned by its social, cultural, economic, political and religious situations. Hence the educational problems of a country have their origin in some social problems and they do not exist by themselves, as there is a close relationship between education and society. The sociological methods of the study of comparative education does not emphasize only the past causative factors, but also those social and cultural aspects which may be responsible for the problem.

**Assumptions of the approach**

Society is considered as a fit subject for speculation and enquiry. Enquiry into the nature of human knowledge, the nature of human science and the question whether laws and principles underlie the growth and development of society are important.

Comparative enquiry in education may exhibit the influence of the trend towards the study of society.

The development of a sociological viewpoint implies a degree of analysis rather more refined than mere cultural descriptions. It emphasis is on the possibilities of prediction. Thus Comparative Education study will
be a study of the dynamics of an educational system and of its relationship with other aspects of society.

**Steps to follow**

The following are the steps that could be followed when using sociological method of data collection:

i. Identification and collecting things of practical value that can be learnt from the study of foreign systems of education.

ii. Analysis of the extent to which things outside the schools may influence the things inside the school, an analysis of how school teaching staff, or classes of pupils relate themselves to the system and how they may be inextricably connected with the life of the nation.

iii. Investigations of how Comparative Education studies, as an instrument of reform, may also be an agency for promoting international understanding. Since the collection of information of a comparative kind would make it necessary for teachers. For example, there should be a system of our own country, Kenya. This ought to give the clues to the most valuable lessons, which can be drawn from, the educational system of another country. We have to show concern for national background in our enquiries on education of the country studied. Lastly there is need to be aware that educational reform and innovation would have wide social implications.

iv. Look for the means of prediction, or theories, which would enable us to anticipate events. Prediction as a purpose implies a stress on sociological dimension in addition to the historical perspective of the pioneers.

**Shortcomings of the sociological method**

The sociological method suffers from the limitation that it ignores the contributions of individuals towards the growth of education. We know that in each country there are some individuals who have contributed immensely towards the growth of education in their countries.

The main proponents of this approach are Michael Sandler, William Harris, H.J. Noah, M.A. Eckstein.
Philosophical analysis

In using this technique, the main assumption is that a process of simplication would succeed in diminishing the number of diverse events to be considered.

Explanation of any education system is connected with the philosophy of that country. The national styles of philosophy or different styles of arguing for example America pragmatism or French nationalism can help in explaining the education system found in a particular country.

Thus the establishment of a predominant mode of thought can be linked to every aspect of an educational organization of the culture and the methods of teaching employed.

In this approach we stress the need to collect reliable data on an international scale in order to facilitate comparison in education. We have to explore the possibilities of defining a number of national traditions stemming from each nation’s philosophical orientation.

The meaningful comparison and even prediction is done as to what may happen in future, according to the national styles of thinking and hence, of doing things.

Thus in advocating the isolation of only one main element, the ideology, the philosophical analysis may give us a manageable scheme, allowing a clear relationship to be established, if this exists, between educational practice and national thought or style.

CONVENTIONAL METHODS

They are contemporary attempts to systematize methodology in Comparative Education research. These methods include:

- Systematic area study approach (George E. Bereday)
- Problem solving approach (Brian Holmes)

Systematic area study approach

George E. Bereday (1964) propounded this method and it had the following assumptions:

i. We can use this approach to make analytical surveys of systems of education in various countries or communities
ii. The study of other education systems acts as a mirror for evaluation of one's education system.

iii. This study approach is multi-disciplinary in character. It is assumed that we can rely on many fields of study for example sociology, history, economics, philosophy, geography, and politics. Some of the issues we deal with are so complex that they present methodological problems. Solutions to these problems are not possible without multidisciplinary cooperation—we need skills other than educational knowledge, to make sense out of the similarities and differences among education systems.

**Constituents of systematic areas study approach**

The following are the steps that could be followed when using systematic area study approach:

i. Description

ii. Interpretation

iii. Juxtaposition

iv. Comparison

v. Suggestions, generalization and conclusion

**Description**

Description starts with extensive reading. The resources may be primary, secondary or auxiliary. These sources will help to describe how things are. For example

The primary sources will include:

- Eye witness accounts
- Reports and transcripts of proceedings
- Written materials of various kinds
- Visits to schools.

While secondary sources will include published works such as textbooks on education dealing with the countries under study. On the
other hand Auxiliary sources will include materials or sources of information, which may not be talking about education directly. Going through them one is able to gain certain information about the education of people in those countries. They include novels, storybooks, magazines, and journals.

**Interpretation**

The second step is that of interpretation. In this step we explain why things are as they are i.e. explaining/interpreting the collected information. We give reasons/justification for the presence/absence of certain features in educational systems studied. The reasons may be historical, geographical, social-cultural, economic, and political. Other disciplinary areas are used to explain why an educational/aspect is as it.

**Juxtaposition**

The third step is that of juxtaposition. In this step the information is put into groups or categories according to those features, which can be, comparable and non-comparable features. In this way similarities and differences can be clearly seen. The use of charts, bar graphs, and sketches can be used to illustrate the information required. For example the table below show the structural duration of education system in the East African countries. From the table one can deduce the similarities and differences of the structural duration in each of the five countries. Various reasons such as economic and political stability can be used to explain the differences and the similarities prevalent in each country.

<table>
<thead>
<tr>
<th></th>
<th>1°</th>
<th>2°</th>
<th>Higher</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kenya</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>Uganda</td>
<td>7</td>
<td>4+2</td>
<td>3</td>
<td>16</td>
</tr>
<tr>
<td>Tanzania</td>
<td>7</td>
<td>4+2</td>
<td>3</td>
<td>16</td>
</tr>
<tr>
<td>Rwanda</td>
<td>6</td>
<td>3+3</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>Burundi</td>
<td>6</td>
<td>3+3</td>
<td>4</td>
<td>16</td>
</tr>
</tbody>
</table>

Structural duration

65
Comparison
We compare features in one system with those of other countries/institutions under study. We take note of the similarities and differences and reason why these are as they are.

Suggestions, generalizations and conclusion
On the basis of the findings in the foregoing steps we draw conclusions and put forward suggestions for new lines of action. These are based on factors behind the similarities and differences, which have been observed.

Edmund King
Edmund King (1968) proposed another method for comparative education research, a variation of the method of Bereday. King sees the role of comparative education as assisting in educational policy decision. The role of comparativists is to provide evidence for review and for new policy decision, and to put forward, from comparative studies, the pros and cons of alternative policies. His proposed method consists of the following steps:

i. Problem: an educational problem is identified (by policy makers or by comparativists)

ii. Acquisition of data: policies pursued in education systems abroad in an effort to address similar problems. These data are then arranged into patterns

iii. A comparative analysis is done, the pros and cons of different policy options in different contexts are spelled out

iv. On the basis of the analysis done in iii, policy making suggestions are made to the policy makers

v. The policy makers take a policy decision

vi. Policy implementation

The policy implementation is studied, revealing a new problem and the cycle can re-commence at i.
Problem solving approach

Brian Holmes (1965) envisioned the field of comparative education as eminently practical in nature, providing the basis for the solutions to educational problems. He spelt out a means of identifying a problem and its possible solutions and further suggested ways of predicting the greater likelihood of a particular reform bringing about a desired result. For the success of this approach Holmes upheld the following assumption.

Assumptions

i. It is possible to use stages of reflective thinking as put forward by John Dewy.

ii. That the function of reflective thinking is to clear up a confused situation i.e. to solve a problem.

iii. That testing is possible that is making logical deduction from the hypotheses within the context of relevant factors and then comparing the predicted events with the actual events, which are observed to flow from a selected course of action.

iv. That agreement between the predicted and observed events provides verification of the hypothesis that is an explanation of events constitutes a successful solution of the confused situation.

v. That disagreement between the two types of events (predicted and observed) constitutes a refutation of the hypothesis.

Steps

Here below are the steps that should be followed when using the problem solving approach:

i. Problem identification

Involves selection of vaguely perceived problem that catches our interest e.g. general dissatisfaction with an aspect of education for example poor examinations performance, students unrest, gender issues etc

ii. Problem analysis
Intellectualize the vaguely perceive problem in general terms. A description of the conditions under which the problem is found should be given. Describe the trends that are related to vaguely perceived problem.

iii. Proposed problem solutions
Describe the reform proposals and policies put forward as solutions to the problems. This will help by providing the suggested solutions to the problem.

iv. Specification of the context
The fourth step will involve the identification and description of factors, determinants and conditions likely to influence outcomes of the proposed policy solutions (in no. 3 above). There are factors, conditions; determinants, which, in our opinion, may have been over-looked by those who proposed solutions to the vaguely perceived problem

v. Comparison
Compare the predicted or anticipated functional activities (based on proposed policy solutions) with the actual observable practices. This is a verification stage. Have things worked out as anticipated by those who proposed the solutions. Compare with what you find out in relation to step 3 and step 4.

vi. Conclusion
On the basis of the findings from the study, conclusions and predictions made. Suggestions are then made for new lines of actions.

A variation on Holmes' method was proposed by Harold Noah and Max Eckstein (1969). They proposed the following seven steps for comparative educational research:

i. problem identification

ii. hypothesis formulation

iii. empirical research in the light of the hypothesis
iv. selecting areas or aspects for comparison  
v. collecting information  
vi. processing data  
vii. implications of results: constructing of theory.

**SUBJECTS OF COMPARISON**

**Comparing areas**

Traditionally comparative analyses in education focused on geographical entities as units of comparison (Manzon, 2007: 85), particularly the nation-state as the overwhelmingly dominant unit of analysis. The last-mentioned, therefore (at least in its classical form) entailed a systematic analysis of national contexts (i.e. national shaping forces of national education systems, such as economy, demography, geography, technological development, political system, social system, economy and others) followed by a systematic analysis of the components of the national education systems itself (these components will be discussed in the next section, under the structure of the education system).

While any study of a teaching-learning community necessarily involves a spatial dimension, there has recently been a movement away from geographical entities as the main ordering principle (to subjects such as comparing times, cultures or themes; to be discussed after this section) as well as calls to move away from the nation-state as unit of analysis to both the larger units (world system, supra-continent, continental, and supra-country) as well as to smaller units (sub-country, institution, class, individual even sub-individual). Globalisation has caused some comparativists to suggest a shift to a higher level of analysis (for example, Bray, 2003; Jarvis, 2000). At the same time, other comparativists have made equally strong cases for giving attention to smaller levels of analyses, such as classrooms (for example, Stenhouse, 1979). The once omnipotent nation state has lost its power in politics in recent times and there is a shift of locus of control into two opposite directions: to larger (supra-national/regional and global) levels and to smaller levels (decentralisation, localisation, empowerment of minority groups). This has led to calls for a broadening of focus in comparative
education from the dominance of the nation state to the inclusion of larger and smaller levels in the scope of comparative education.

Comparing systems


While there has recently been a shift away from systems as prime subject of study by comparative education scholars (to for example the comparison of themes or of times), and there have been calls to move from national education systems to smaller and larger unit, any comparative study per definition deals with a system. Even a study of a single class deals with that class as a teaching-learning community or system. Moreover, a comparative education study would place such a class within the school (institutional) system and within the national education system.

Comparing times

Sweeting (2007) draws attention to the fact that periodically in the past comparativists have pleaded for more historic-comparative research. Around the turn of the century, there were once again such calls from eminent comparativists such as Keith Watson and Andreas Kazamias (Sweeting, 2007: 148).
Sweeting (2007:159-168) distinguishes three structures for comparing times: the diachronic, the synchronic and the quasi-chronic. The first, diachronic analysis, is the most common. Its main basis for organisation is chronological. Synchronic analysis presents static snapshots. The third form, quasi-synchronic, encompasses a whole range of hybrids of the first two types.

A particular significant form of synchronic studies is transitiologies. Cowen (1996: 163-165; 2000: 338; 2002: 422) established the term “transitiologies” in comparative education. He was followed by several others (Alexander, 2001: 507; Steiner-Khamsi & Stolpe, 2004: 29-53; Kazamias, 2001). Cowen (2000: 338) defines “transitiology” as “... the more or less simultaneous collapse and reconstruction of (a) state apparatuses, (b) social and economic stratification systems and (c) political visions of the future; I which (d) education is given a major symbolic and deconstructionist role in these social processes of destroying the past and redefining the future”.

Comparing cultures

In the past, when the borders of nation-states largely ran coterminous with that of cultures, the general contention was that comparative education studies national education systems as outcomes of national contexts; each national context then signifying a particular, homogenous cultural complex.

Recent times have been characterised by the following trends:

- The dissolution of geographical borders between cultures, as people of different cultures live in close proximity to each other (Steyn & Wolhuter, 2008: 22-24)
- The rise of the creed of multiculturalism, i.e. granting positive recognition to cultural, be it linguistic, religious or other forms of diversity, and rights to minorities
- The philosophy of postmodernism with its rejection of metanarratives and its belief in multiple truths.

These, together with the differences in accent in a post-9/11 comparative education (Nelles, ed., 2003), brought about a heightened
interest in culture in comparative education ("culture" is then used here, meaning "shared meanings and ways of life", Mason, 2007: 62). The role is seen as explicating the experience of individuals (as members of specific cultural groupings with regard to particular socially contextualised educational institutions and situations. With the focus of the education debate shifting increasingly towards how learning can best be facilitated as opposed to teaching, and on learning outcomes rather than on inputs, Comparative Education studies acquire increasing value on the strength of their capacity to relate individual perspectives to societal contexts, in an intellectually coherent way that will facilitate learning (Broadfoot, 1999: 21).

Comparing themes
As stated, traditionally comparative education scholarship presented comprehensive studies of entire education systems, particularly national education systems. Since the middle of the twentieth century, comparative education studies have tended to become more atomised, i.e. focusing on one theme only.

CONCLUSION
Today comparative education is further away from a single methodology. Definitions and new disputes concerning the scope and analytic categories of scholarship have emerge since the 1970's giving rise to a wide diversity of approaches, perspectives and orientations. A number of factors have contributed to this:

i. Failure of traditional ideas to explain educational development world wide

ii. Emergency of alternative ideologies, hence, the field still remains an ill-defined one. The research in the field has and will remain diverse, thus shifting the debate but perhaps not resolving issues and challenges concerning the theory and methodology in Comparative Education.

ACTIVITIES
Take three educational issues/problems. How would you research these issues/problems. Motivate your choice.
REFERENCES


