NEW APPROACHES TO COMPARATIVE EDUCATION

Edited by Philip G. Altbach and Gail P. Kelly

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NEW APPROACHES TO COMPARATIVE EDUCATION

Edited by Philip G. Altbach and Gail P. Kelly

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Introduction: Perspectives on Comparative Education

PHILIP G. ALTBACH AND GAIL P. KELLY

This volume, New Approaches to Comparative Education, has a unique purpose. We have carefully selected articles published in the Comparative Education Review to illuminate the diversity of perspectives on research in comparative education that has emerged in recent years and provides new visions for the field. Our intention is to present an array of new viewpoints, orientations, and approaches that have arisen since the "State of the Art" issue of the Comparative Education Review was published in 1977. All the essays included here have appeared in the Review since that time. The 1977 "State of the Art," for the most part, focused on comparative education from the vantage of the social sciences and stressed the contribution of those disciplines to the field. Such an orientation to the field reflected but one in a long research tradition; but it dominated North American scholarship at that time. This volume departs significantly from that presentation of the field. We do not ask here how the social sciences can guide research; rather, our intent is to draw attention to the new and diverse currents of thought about comparative education, the use of the field, regional variation and world systems analysis, the theories undergirding comparative studies and paradigm shifts, and the debates over ideology and scholarship that give the field vitality and strength.

Since 1977 the field of comparative education has broadened its research orientation. As some of the essays in this book indicate, there is no one method of study in the field; rather, the field increasingly is characterized by a number of different research orientations. No longer are there attempts to define a single methodology of comparative education, and none of our contributors argues that one single method be developed as a canon. Scholars in comparative education have recently adopted a range of methodologies and approaches to develop innovative ways of dealing with complex research issues and in analyzing educational data creatively in a cross-cultural frame. The new approaches reflect eclectic and creative ways of dealing with a broad spectrum of issues. Prior to 1977, comparative education was, in general, concerned with national educational policies. Since that time, the questions scholars address have turned to intranational comparisons as well as analysis of transnational trends. Research has also been guided by a broad range of different theories. Since 1977 we have seen the application of conflict theories to the field's scholarship. The

¹ "The State of the Art: Twenty Years of Comparative Education," Comparative Education Review, vol. 21, nos. 2–3 (June/October 1977).

emergence of this literature had lead to a set of lively debates about the relation of theory to research and theory to developing prescriptions for educational policy.

This book is not a handbook of comparative education methodology. Rather, it presents a range of orientations toward the conduct of research in the field. The articles we present reflect diverse thinking on the use of the field, methods for comparison, and theories guiding scholarship that have come to the fore since 1977. This volume coincides with the beginning of the thirtieth year of publication of the Comparative Education Review; it is fitting that in it we explore future research directions and reflect on the debates in our field that are germane to the diverse clientele and uses of the field.

Internationalization and Expansion

In the 30 years since the founding of the Comparative Education Review, the field has expanded from a small enclave of scholars mainly in North America and Great Britain to a worldwide "invisible college" of scholars, teachers, policymakers, and students concerned with the cross-cultural understanding of education in an increasingly complex world. The growth of the field has been impressive and has added tremendous diversity and strength to it. Comparative education organizations were established first in Western Europe, and the Comparative Education Society in Europe (CESE) now has branches in a large number of countries including France, Great Britain, the Netherlands, Belgium, the German Federal Republic, and Spain. Japan has an active and long-standing comparative education organization, and recently China, India, and South Korea have established organizations. Comparative education as a field has become truly international, and this will have an impact on scholarship as researchers in the Third World begin to publish their work.

The development of the infrastructures of the field has also been impressive. When the Comparative Education Review was founded; it was joined only by the International Review of Education. The number of journals in English has grown impressively—Comparative Education, Compare, and Canadian and International Education are among the key publications. Prospects, published in four languages by Unesco, features work on comparative education. In addition, journals exist in French, German, Spanish, and Chinese. Books on comparative education are published regularly by such publishers as Praeger and Pergamon in English. In short, the scholarly infrastructure has grown impressively. Research and scholarship is still dominated by the English-speaking countries, but with the growth of interest in the field in other parts of this world, this domination may in time be broken.

The Origins and Development of the Field

It is not possible to present a complete history of the field of comparative education. This has been done by J. Trethewey and by Harold Noah and Max Eckstein,² although a definitive history of the field has yet to be written. Nor is it possible to provide a description of the multifaceted substantive contributions of the field. It is our purpose here to provide a brief overview of the development and scope of the field in order to situate comparative education as a field of study. Comparative education. unlike most other fields in educational studies, has encompassed a large variety of disciplinary and methodological approaches and has covered many substantive topics. This is a very important strength of the field in that it has from time to time attracted able scholars from many fields and has used research paradigms from a variety of disciplines. But it does create certain definitional problems. Over time, this has made the development of a distinct methodology in comparative education impossible and probably undesirable as well.3 Comparative education has been increasingly marked by considerable diversity in approaches to research and analysis. Given the range of concerns of the field, this diversity is natural. Comparative education, after all, takes the world as its research base and can encompass virtually any methodology that can help to understand an education-related topic in cross-cultural perspective.

Historically, comparative education has encompassed many research traditions. One of the most long-standing of these has been that of "travelers' tales"—descriptions of educational practices in other countries. Frequently such descriptions became the basis for inducing changes at home. For example, many scholars and policymakers were interested in the development of German education in the nineteenth century; Urie Bronfenbrenner's work on socialization of Soviet children in the 1960s became a way of criticizing American child-rearing and school practices.⁴

Another tradition in the field is educational "lending and borrowing," which aims at transferring practices from one country to another in the hopes of reforming education for the better. Flexner's famous study of higher education fits this category as does much contemporary scholarship on educational achievement and on school practices in Japan.⁵ The im-

² J. Trethewey, Comparative Education (Elmsford, N.Y.: Pergamon, 1976); Harold Noah and Max Eckstein, Toward a Science of Comparative Education (New York: Macmillan, 1969).

³ For a bibliographical guide to the field, see Philip G. Altbach, Gail P. Kelly, and David H. Kelly, *International Bibliography of Comparative Education* (New York: Praeger, 1981).

⁴ Urie Bronfenbrenner, Two Worlds of Childhood: USA and USSR (New York: Pocket, 1973).

⁵ Abraham Flexner, Universities: American, English, German (New York: Oxford University Press, 1930); on Japan, see William Cummings, Education and Equality in Japan (Princeton, N.J.: Princeton University Press, 1980), and Nobuo Shimahara, Adaptation and Education in Japan (New York: Praeger, 1979).

position of educational models from one country to another is part of this tradition as well. Much of comparative education evolved in the context of colonialism. Britain, France, and other colonial powers imposed educational models on their overseas colonies, often displacing indigenous forms and without consultation with the colonized. Educational "lending" in much of the world included elements of coercion.⁶

Another major research tradition in comparative education is that of historical/cultural studies. Such work was pioneered in the field by Issac Kandel and taken up by Robert Ulich. Their works sought to understand how history and culture influenced the evolution of contemporary education. Although Kandel and some of his followers, notably Vernon Mallinson, developed national character as a construct to guide understanding of contemporary educational practices, the research tradition in the field often uses no such construct; it does seek to understand, for example, how language and culture affect what children learn in school.⁷ An example of such work is Gay and Cole's study of mathematics instruction among the Kpelle of Liberia and John Ogbu's recent work on caste and class in education.⁸

The improvement of international understanding in general and education in particular is a long-standing tradition in the field. There has always been and, we hope, will continue to be a humanitarian and ameliorative element that has impelled many comparative educators to become involved in international programs to improve aspects of education and to encourage increased international understanding, particularly in the schools, as a contribution to world peace and development. This trend, which can be seen in the writing of Kandel and Mallinson in an earlier period, is reflected in the involvement of comparative educators in efforts to improve education in Third World nations and to teach about human rights today.

In the 1960s a new tradition emerged that attempted to build a "science of comparative education." George Bereday's classic volume marked the beginning of such a trend. Noah, Eckstein, and C. Arnold Anderson contributed much to developing it to a point where the "scientific" approach to comparative education dominated the field in North America through the 1970s. Bereday tried to develop a methodology for conducting research that was distinctly comparative; Noah and Eckstein, as well as Anderson,

⁶ See Philip G. Altbach and Gail P. Kelly, eds., Education and the Colonial Experience (New Brunswick, N.J.: Transaction, 1982).

⁷ Isaac L. Kandel, "Problems of Comparative Education," International Review of Education 2, no. 1 (1956): 1–15; Vernon Mallinson, An Introduction to the Study of Comparative Education (London: Heinemann, 1975).

⁸ John Gay and Michael Cole, *The New Mathematics in an Old Culture* (New York: Holt, Rinehart & Winston, 1967); John U. Ogbu, Caste and Class in Comparative Perspective (in press).

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believed that a "science" could be developed only through use of methodologies borrowed from the social sciences that consisted of hypothesis formulation and testing and the use of quantification and statistics in the conduct of scholarship. The goal was to discover scientific laws governing school/society relations that could guide policy decisions. While North American scholars focused on discovering scientific laws, in Great Britain scholars such as Brian Holmes and Edmund King doubted the possibility of being able to do so. However, they attempted to develop scientific approaches to the field that could guide educational decision making. It will be clear from the essays in this volume that in the 1980s the field of comparative education has departed in some significant ways from earlier traditions and that new ones are appearing. New research topics have emerged, and the field increasingly has come to discuss the underlying assumptions guiding research methods as well as choice of research questions in ways that in the past were muted.

Trends in Research

Comparative education not only has a range of research traditions but has also covered many substantive fields and topics. This brief summary is intended to provide a sense of the range of studies that have been undertaken in recent years rather than a bibliographical guide to the literature. Our special interest is to indicate the richness of the research that has emerged in recent years.

It is fair to say that in the major expansion of comparative education in the 1950s and 1960s, sociology and economics were the main disciplines that formed the basis of much of the research. Attention was focused on societal outcomes of education. Much of it was informed exclusively by human capital theory. This was particularly the case with scholarship in Third World countries. Interest in education became almost exclusively an interest in production and individual income. Other educational outcomes—social, political, and cognitive—seemingly became devalued. The focus on production and individual income also denied complex social relations and the obvious effect of class, race, gender, and ethnicity on who got and who could use education in what context. By the late 1970s, voices within the field argued forcefully that human capital theory, like

¹⁰ See, e.g., Brian Holmes, Problems in Education: A Comparative Approach (London: Routledge & Kegan Paul, 1965); Edmund King, Comparative Studies and Educational Decision (London: Methuen, 1968)

⁹ George Z. F. Bereday, Comparative Method in Education (New York: Holt, Rinehart & Winston, 1964); Harold Noah and Max Eckstein, Toward a Science of Comparative Education (New York: Macmillan, 1969); Max Eckstein and Harold Noah, eds., Scientific Investigations in Comparative Education (New York: Macmillan, 1969); C. Arnold Anderson, "Methodology of Comparative Education," International Review of Education 7 (1961): 1–23.

¹¹ For a guide to the literature in specific areas of comparative education, see Altbach, Kelly, and Kelly.

structural functionalism of which it was a variant, had blinded research to the key educational issues facing the Third World in particular and most countries in general. They argued that education had political and social outcomes in many instances in contradiction to economic ones. In addition, they argued that schools have *educational* outcomes, which the field largely ignored and which were of central concern to policymakers and educators.

The critiques of the 1970s gave rise to a literature that began to look at who went to school—and at the differential opportunities, experiences, and outcomes of women, ethnic and racial minorities, and social strata. Such research often did not dwell on comparison of nations; instead, it compared women, minorities, and various social strata's experience with schooling.

A concern with remaining social inequalities and a realization that educational "inputs" at the micro level did not necessarily lead to the solution of educational problems or to socioeconomic development led researchers to look more deeply at precisely what schools taught and how the quality and content of education affected its use by different categories of students. Research has turned in the 1980s to tracing the processes of education to a wide array of educational, personal, and social outcomes, and innovative research strategies have begun to enter the field as such research progresses.

A research direction that was pioneered in the late 1960s, but remained for some time the domain of psychometricians, has been the study of educational achievement. The research done by the International Association for the Study of Educational Achievement (IEA) has been influential in making the field of comparative education orient research toward an understanding of the educational outcomes of schooling, an area that the field had generally neglected up to that time in favor of focusing on social and economic outcomes. As more scholarship has appeared on the achievement outcomes of education, the field has begun to ask about the effect of culture, politics, and social structure on the ways in which students perform in schools. Additionally, it has stimulated a series of lively debates between psychometricians and comparativists on the meaning of crossnational comparisons of educational achievement data.

Specific crises have traditionally stimulated research on particular subjects in the field. In the 1960s, the worldwide wave of student political activism stimulated research on student politics. Today, given the world food crisis and the economic recession that has affected many countries in the world, the field has increasingly become concerned with issues of educational efficiency. ¹² Scholars recently have begun to ask how greater

¹² See Philip H. Coombs, *The World Crisis in Education: The View from the Eighties* (New York: Oxford University Press, 1985).

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quality of education can be achieved without greater increases in expenditure. They have also begun to question the wisdom of educational expansion and the trend toward comprehensive, common schooling for all, which had preoccupied much research in the 1960s and 1970s. Some have begun to look at alternative modes of educational finance and delivery of educational services.

While a large part of the field has turned to new ways of looking at schooling and its relation to the world outside the school, another new current in the field has been self-reflective and has asked how scholarship in the field has evolved and the relation to the questions scholars ask to how research is funded and sponsored. In addition, they have asked how the priorities of funding agencies—be they public or private, bilateral or multilateral—affect what questions comparativists ask and how their research is used. Much of this scholarship has been critical of funding agencies and aid policies; for the most part, such scholarship has raised a series of controversies in the field about the nature of comparative education.

We have discussed some of the new research trends to emerge over the past years; elsewhere in this volume we will discuss in greater detail the challenges that we believe face the field in the 1980s. Without question, we believe that the emergence of these new trends represents vitality in the field and a self-conscious attempt to make the field relevant to a vast and diverse constituency. The field in the 1980s has matured and has begun to arrive at a deeper understanding of the complexity of drawing relations between the meaning of education in today's world.

Conclusion

This volume, which focuses on recent developments in comparative education, must be seen in the broader context of the development of the field. We have provided an overview of some of what we consider to be important elements in the field. Historical origins and research directions are important elements to consider when analyzing the contemporary status of comparative education.

Comparative education has surmounted many obstacles in its short history as a self-conscious academic specialization in North American colleges and universities. It has at first surmounted the ever-present parochialism of American education: the field has in fact contributed significantly to an international consciousness in the study of education in the United States and Canada. Comparative educators were able to build the institutional structures and develop the expertise necessary to maintain a variety of centers and institutes and to develop appropriate library and other resources. When research and consulting funds were readily available, the field drew on them to further develop a cadre of educators with overseas experience. Academic programs, although working with various

advising projects, were not swallowed up by them. Somewhat later, when social science methodology became the generally accepted way of looking at research questions in comparative education, the field did not lose its self-consciousness to the "parent" social sciences and continued to develop as an independent but related academic specialty.

Perhaps the most important challenge came in the 1970s, when external funding all but disappeared in the United States and comparative educators were virtually thrown back on their own resources. The number of American graduate students choosing to specialize in the field dwindled as funding opportunities disappeared and jobs became scarce. But the field managed to maintain its viability in most of the institutions in which it had established itself. To some extent, foreign students replaced Americans in doctoral specializations. Students and faculty became adept in choosing research topics that could be done on a small scale or from relevant documentary sources in the United States. A trickle of money from external sources continued to be available; generally, however, this was earmarked for evaluation or other projects directly related to ongoing assistance or other programs of the major funding agencies such as the World Bank or USAID

Comparative education in the 1980s is a healthy, intellectually viable field of study. Its problems remain, but it has successfully built the infrastructures necessary to ensure survival. Indeed, on a very small scale, the field has flourished. Its "invisible college" of scholars and students, its journals and book publishers, and its regional and national organizations all testify to an active community of scholars. The thirtieth anniversary of the *Comparative Education Review* is not merely an appropriate chronological occasion to look at the methodological and research directions of the field; it is a watershed and a symbol of the impressive development of comparative education in North America in the past 3 decades.

Overview of This Volume

This book concentrates on current and future trends in comparative education. We have organized the volume to begin with a look forward, followed by a series of reflections on the field by a group of distinguished scholars. We conclude with some methodological considerations. Our final chapter is an overview of current trends and the responses by scholars in the field to these trends. All the chapters have appeared as articles in the Comparative Education Review.

The first section, "New Currents and Critiques," includes chapters dealing with recent reflections by comparative educators on a variety of topics related to the development of the field and the interpretation of major educational issues of contemporary importance. From quite different

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perspectives, John Boli and his colleagues and Mary Jean Bowman look at educational expansion and the spread of schooling worldwide, certainly the key international trend of the past half-century. The underlying fact of educational systems in every country has been rapid expansion. In the Third World, this expansion continues while demographic trends and fiscal problems have slowed growth in most industrialized nations. These two chapters look at broad trends, going beyond analysis at the nation-state level.

Several of the chapters in the first section stress alternative ideological perspectives in the comparative analysis. Martin Carnoy and Michael W. Apple utilize Marxist approaches to the study of educational issues and show that this perspective can provide some important insights into key questions in the field. Both authors question many of the assumptions on which much "mainstream" research is based. Without question, Marxist and other critical perspectives can help to illuminate educational questions. Vandra Lea Masemann argues that comparative educators must go beyond the traditional "macro" research approaches and focus more on in-school and ethnographic methodologies. She shows in her chapter that ethnographic research can be very important in permitting a deeper understanding of some questions. Gary L. Theisen and his colleagues urge us to look critically at important trends in research in comparative education by focusing critical attention on the influential international studies of educational achievement. "New Currents and Critiques" is intended to show how comparative education has broken new ground in recent years and how alternative approaches to research can be used to look both on broad international issues such as questions of school expansion and in depth on in-school questions that can be looked at in comparative perspective. The chapters in this section do not cover all new approaches, nor do they thoroughly critique existing trends in research and analysis. Our intention is not to argue that comparative education requires a revolution in analysis but only to point out that there have been significant, exciting, and useful new developments in the field that are worthy of careful consideration.

In the second major section, "Reflections on the Field," several senior scholars analyze the field from the perspective of long experience of research and analysis. Harold Noah, a former editor of the Comparative Education Review, provides a wide-ranging discussion of the use and abuse of the field. Max Eckstein, in an intellectually stimulating discussion of the use of metaphor in comparative education, asks us to consider the use of language and of logic in the way that we think about comparative education. His discussion has relevance for the nature of comparative analysis and goes to the heart of some of the unexamined assumptions of thought in the field. Brian Holmes and Lê Thành Khôi, both senior

European scholars of comparative education, write from quite different perspectives on some key aspects of the field. Each reflects some of the ways of thinking about the field from the perspective, respectively, of British and French scholarship. Joseph Farrell deals with some of the broader issues of comparison and perspective on the conduct of comparative research. Erwin Epstein, discussing "Currents Left and Right," decries what he sees as increasing "ideological influences" in the field and urges comparative educators to try to develop a consensus about both the nature of the field and research perspectives to be used. In this sense, he harks back to an earlier period in the development of the field when it was felt that a common approach was possible. While Epstein's points are valuable in terms of pointing out that there are hotly contested viewpoints, it is clear that, in some cases, ideological as well as methodological concerns are part of this debate.

The final section deals with methodological issues. Its purpose is not to provide a guide to methods in the field, or even to articulate the new methodological approaches that have arisen in recent years, but rather to focus on how methodology impinges on research questions. The purpose of the section is to raise large issues of the use of methods, and the three chapters we have included each deal with this broad concern. Reijo Raivola deals with some of the basic philosophical assumptions of the nature of comparison. Frederick M. Wirt and Richard H. Pfau are concerned with the methodological implications of particular research areas in comparative education—educational policy analysis and classroom behaviors, respectively. This section provides some important insights into the nature and uses of methodology in general and as applied to specific research issues in the field.

Comparative education is a field with considerable intellectual vigor. This volume reflects much of that vigor, at least as reflected by North American scholarship. We have not tried to develop a consensus or a new perspective or direction because we feel that the field is much too complex and diverse. This volume celebrates diversity, a range of perspectives, and the variety of new directions that have emerged in the past decade. No doubt the agenda reflected in a volume like this written at the end of this century—only 14 years away—will focus on quite different concerns. Well it should. This is the sign of a field that is alive and relevant.

Critical Ethnography in the Study of Comparative Education

VANDRA LEA MASEMANN

In this essay I consider recent perspectives in educational research and in particular the use of critical ethnography in the study of comparative education. Since the term is relatively new, some introduction will first be given to other approaches, their origins, and their relationship to critical approaches in the field. The parameters of several approaches and their implications for the study of comparative education will be discussed, and suggestions will be made throughout for research applications of these approaches in comparative education.

"Critical ethnography" refers to studies which use a basically anthropological, qualitative, participant-observer methodology but which rely for their theoretical formulation on a body of theory deriving from critical sociology and philosophy. The theoretical forebears in this area date back to Marx, with his critique of bourgeois theories of society, and the positivist sociology of Comte.² The fundamental criticism of positivist social science embodied in Marx's approach was that the distinction between the objective and subjective could not bring together the "is" and the "ought" in a way that made possible the construction of a theory of ethics and politics.³ These questions come down to us today in modern guise when we consider problems in educational research, but their basic core remains the same: Is it the task of social scientists to seek ever more diligently to define objective methods of researching the social world (or education), with possibilities for change seen as simply the result of "reading out the data" and making choices on the basis of some cost-efficient or technological rationale? Or is it their task to attempt to understand as accurately as possible the subjective understandings that actors have of their own version of "social reality"? Or, third, is there some way of seeing social science in Marx's terms that would forever blur the objective/subjective distinction and thus make necessary the redefinition of social research itself? These questions lie at the heart of any discussion of research methodology

Reprinted from Comparative Education Review, vol. 26, no. 1 (February 1982).

¹ See Michael Apple, *Ideology and Curriculum* (London: Routledge & Kegan Paul, 1979), for an orientation to this approach.

² "I shall use the term 'positivism' . . . to characterise an approach to the social sciences which regards them as being the same as the natural sciences, aiming at the formulation of general causal laws, resting their claims to valid knowledge upon the analysis of some empirical reality, not upon philosophical intuition, and thus asserting the unity of scientific method, and which makes a sharp distinction between scientific statements and value judgements" (Thomas Bottomore, Marxist Sociology [London: Macmillan, 1975], p. 9, n).

³ Ibid., p. 10.

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in social science in general as well as in the study of comparative education with which we are concerned here. The history of the development of educational research demonstrates the interplay of thought on these three questions.

Sociological Approaches

A very useful summary of sociological approaches to educational research is given by Karabel and Halsey. They document the rise of functionalist approaches in sociology which attempted to legitimize the study of education as a scientific endeavor. However, the definition of functionalism itself does not necessarily carry with it the notion of objectivity with regard to mode of research. Radcliffe-Brown's original definition of "function" makes no mention of it: "The concept of functions as here defined thus involves the notion of a structure consisting of a set of relations amongst unit entities, the continuity of the structure being maintained by a life-process made up of the activities of the constituent units." Nonetheless, the analogy of the social functioning of society with the biological functioning of the human body makes it clear that Radcliffe-Brown was using positivist conceptions of social science.

Such conceptions of society and its institutions, such as education or the family, were increasingly common throughout the 80 years of this century and gained far more currency in social science than did Marx's attempt to see a social science as ultimately ethical. Several reasons for the nondiffusion of Marx's ideas have been advanced. Mafeje, an African anthropologist, suggests, for example, that positivist functionalist ideas were the ultimate bourgeois conceptions of society which kept the proletariat from realizing their condition. He suggests that, in America particularly, the legacy of nineteenth- and twentieth-century French and British positivist philosophy was accentuated by the historical relativism of Max Weber in his separation of normative judgments from factual statements, a separation which "made it possible for him and his future American followers to think of science as autonomous and morally neutral."6 Moreover, he also attributes to Weber the relativizing and abstracting of ideology "in such a way that it ceased to be a question of class conflict and became merely a problem of interpreting individual intellectual reflexes under determinate social conditions." The legacy of such an approach is clearly seen in the development of American "scientific" sociology and psychol-

⁴Jerome Karabel and A. H. Halsey, *Power and Ideology in Education* (New York: Oxford University Press, 1977).

⁵ A. R. Radcliffe-Brown, Structure and Function in Primitive Society (London: Cohen & West, 1964), p.180.

⁶ Archie Mafeje, "The Problem of Anthropology in Historical Perspective: An Inquiry into the Growth of the Social Sciences, Canadian Journal of African Studies 10 (1976): 313.