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Discourse Formation in Comparative Education

**edited by
Jürgen Schriewer**

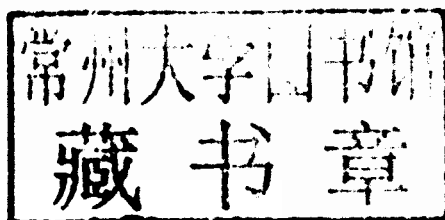


PETER LANG

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PREFACE TO THE THIRD EDITION

The imprint this volume has made since its first publication in 2000 has been remarkable. In addition to being extensively reviewed in the major comparative education journals,¹ it has been used as a key textbook in a number of comparative education programs in universities around the world. Moreover, the wide international response to the volume is testified by several translations. A slightly modified Spanish edition came out even prior to the volume's second revised edition published in 2003.² A Mandarin translation in traditional Chinese characters was published in Taiwan in 2005³ while a distinct translation into modern Chinese based on the simplified Chinese characters in use in mainland China is in preparation for publication at the end of 2008 or the beginning of 2009.⁴

What explains this favorable response to the volume? One might maintain it is the theoretical substance of the essays which the volume brings together that accounts for the interest for the volume that continues to this day. This may hold true in a twofold respect. First, each of the essays included in the volume represents a major theoretical position, current, or research approach which has been developed for the field of comparative education or has emerged in close interaction with comparative social and educational inquiry in general. Second, nearly all of these positions and approaches in the volume have incessantly demonstrated their fruitfulness in generating comparative studies and engendering prolific publication. In this respect, the volume, while

1. In *Comparative Education* 37 (2001), 3, pp. 392-393 (by Patricia Broadfoot), as well as in *Comparative Education Review* 48 (2004), 1, pp. 117-120 (by Irving Epstein).

2. Jürgen Schriewer (comp.), *Formación del discurso en la educación comparada*. Colección «Educación y Conocimiento» (Barcelona: Ediciones Pomares, 2002).

3. Taipei: Higher Education Publishing Co., 2005.

4. Beijing: Beijing University Press, forthcoming 2008-2009.

capturing a certain stage in the recent evolution of and theoretical debate in comparative education research, is far from being outdated. Rather, it stands for a seminal textbook in the best sense of this term, a claim which is substantiated by indication of the impact on comparative research the positions represented by these chapters have had and by the further theoretical unfolding they have undergone over the last decade.

For example, consider the theoretical approaches that seek to grasp the specificities of education under the conditions of an increasingly interconnected world society. The neo-institutionalist "world-polity" approach elaborated by John W. Meyer and Francisco O. Ramirez and their colleagues on the basis of a continual interaction of comparative evidence and theoretical analysis, and brilliantly summarized in both authors' joint chapter for this volume, engendered not only numerous journal articles and book chapters but also a number of authoritative volumes designed to explore the relevancy of the central theses of this approach in fields of social, cultural, and political organization other than education. Such is the purpose, e.g., of the volume on international organizations and their contribution to "Constructing World Culture,"⁵ of the volume on the increasing interpenetration of scientific rationality and the modern "world-polity"⁶ or of the volume on organizations and organizational change in general.⁷ The success of this approach has also become manifest in the increasing number of academic positions taken in North American universities by former doctoral students of John Meyer and Francisco Ramirez as well as in the translations of some of the major works from English into other languages.⁸ However, notwithstanding its

5. *Constructing World Culture. International Nongovernmental Organizations since 1875*, ed. by John Boli & George M. Thomas (Stanford, CA: Stanford University Press, 1999).

6. Gili S. Drori, John W. Meyer, Francisco O. Ramirez & Evan Schofer, *Science in the Modern World Polity. Institutionalization and Globalization* (Stanford, CA: Stanford University Press, 2003).

7. *Globalization and Organization. World Society and Organizational Change*, ed. by Gili S. Drori, John W. Meyer & Hokyung Hwang (Oxford etc.: Oxford University Press, 2006).

8. John W. Meyer, *Weltkultur. Wie die westlichen Prinzipien die Welt durchdringen*, ed. by Georg Krücken (Frankfurt a.M.: Suhrkamp, 2005); a similar Spanish edition, which is currently in preparation, will probably come out in Spring 2009 (Barcelona & Granada: Octaedro Editorial); see also Gili S. Drori, John W. Meyer, Francisco O. Ramirez & Evan

fruitfulness and explanatory power, the neo-institutionalist "world-polity" approach has also engendered skepticism and critical debate on the grounds of its one-sided emphasis of the diffusionist thrust of modern world culture, its focus on the generalized emergence of "isomorphism," and its preference for large-scale quantitative surveys including, to the extent possible, all recognized national societies existing at a certain moment in time.⁹ Consequently, counter-evidence resulting from a more qualitative comparative-historical approach, an approach in other words that seeks to grasp the distinct "worlds of meaning" associated with apparently similar institutions, has called into question some of the central theses of the "world-polity" approach.¹⁰ Moreover, from its first edition onwards, elements of critical debate had deliberately been incorporated into the composition of the volume by including an alternative approach of comprehending the relationships between globalization, education, and the nation-state. Indeed, the chapter by Roger Dale represents a strand of theorizing that is also – to take Meyer's and Ramirez's term up again – "macro-sociological" in scope to be sure; but this strand fosters, not a "culturalist" style of reasoning, but a "realist" one. One that is, in Roger Dale's words, rooted in "political economy." This strand of theorizing as well has been further elaborated generating

Schofer, *La ciencia en la política mundial moderna: Institucionalización y globalización* (Barcelona: Pomares, 2006).

9. See the contrasting evidence displayed, e.g., in *Local Meanings, Global Schooling. Anthropology and World Culture Theory*, ed. by Kathryn Anderson-Levitt (New York: Palgrave Macmillan, 2003).

10. See by Jürgen Schriewer, "Multiple Internationalities: The Emergence of a World-Level Ideology and the Persistence of Idiosyncratic World-Views", in *Transnational Intellectual Networks. Forms of Academic Knowledge and the Search for Cultural Identities*, ed. by Christophe Charle, Jürgen Schriewer & Peter Wagner (Frankfurt a. M. & New York: Campus, 2004), pp. 473-533, as well as "Wie global ist institutionalisierte Weltbildungsprogrammatik?" in *Weltgesellschaft. Theoretische Zugänge und empirische Problemlagen*, ed. by Bettina Heintz, Richard Münch & Hartmann Tyrell (Stuttgart: Lucius & Lucius, 2005) (= special issue of *Zeitschrift für Soziologie*), pp. 415-441. Cf. also *Weltkultur und kulturelle Bedeutungswelten. Zur Globalisierung von Bildungsdiskursen*, ed. by Jürgen Schriewer (Frankfurt a. M. & New York: Campus, 2007).

both extended theoretical analyses and theoretically informed studies on different policy fields with a special focus on developments in Europe.¹¹

In the same vein, most of the other theoretical positions and research approaches expounded by the essays of this volume have experienced further elaboration and prompted substantive research. This is true for the "economic cycle" approach towards analyzing the evolution of educational systems over time further developed by Claude Diebolt.¹² And this is true particularly for analyses of the processes and mechanisms of trans-national policy transfer in education pursued by Gita Steiner-Khamsi on an almost global scale and with a view to both further conceptualization and empirical substantiation.¹³ Likewise, the prolific production of comparative and international analyses from the vantage points of critical hermeneutics, feminist thought, or post-modernist theorizing indicates the fruitfulness of the positions supported by Anthony Welch, Nelly P. Stromquist, and Thomas S. Popkewitz respectively.¹⁴

11. See the essays on *Globalisation and Education in Knowledge Economies and Knowledge Societies*, ed. by Roger Dale & Susan L. Robertson as special issue no. 30 of *Comparative Education* 41 (2005), no. 2, as well as the collection of studies on *Globalisation and Europeanisation in Education*, ed. by Roger Dale & Susan L. Robertson, vol. 1-2 (Oxford: Symposium Books, 2009).

12. See the comparative-historical studies by Claude Diebolt, Vivien Guiraud & Marielle Monteils, *Education, Knowledge, and Economic Growth. France and Germany in the 19th and 20th Centuries*. Comparative Studies Series, vol. 12 (Frankfurt a. M. etc.: Peter Lang, 2003).

13. See the volume on *The Global Politics of Educational Borrowing and Lending*, ed. by Gita Steiner-Khamsi (New York & London: Teachers College Press, 2004) as well as the in-depth analyses of the transfer of an international governance device such as the educational voucher system into post-Communist Mongolia by Gita Steiner-Khamsi & Ines Stolpe, *Educational Import. Local Encounters with Global Forces in Mongolia* (New York: Palgrave Macmillan, 2006).

14. See, among others, *Globalisation, Structural Adjustment and Educational Reform in Asia and the Pacific Region*, ed. by Ka-Ho Mok & Anthony R. Welch (London: Palgrave Macmillan, 2003); Anthony R. Welch et al. *Education, Change and Society* (Melbourne etc.: Oxford University Press, 2007); Nelly P. Stromquist, *Education in a Globalized World: The Connectivity of Economic Power, Technology, and Knowledge* (Lanham, MD: Rowman & Littlefield, 2002); Nelly P. Stromquist, *Feminist Organizations and Social Transformation in Latin America* (Boulder, CO & London: Paradigm Publishers, 2007); *World Yearbook of Education 2006. Research and policy: Steering the knowledge-based economy*, ed. by Jenny Ozga, Terri Seddon & Thomas S. Popkewitz (London: Routledge, 2006); Thomas S. Popkewitz, *Cosmopolitanism and the Age of*

Just a word, finally, concerning the more encompassing essays in Sections One and Four of the volume, which were meant to frame the bulk of the chapters and to discuss in novel ways the theoretical structure of comparative education as an academic field of study. My own approach, which gives preference to socio-historical analyses of the field and its production rather than to normative methodologies, has been further elaborated by combining insights flowing from the history of the sciences with earlier analyses drawing largely on concepts from the sociology of knowledge.¹⁵ Moreover, the resultant conception of comparative education research – a conception conceiving the field in terms of a "Science of Complexity" – has convincingly demonstrated the essentially critical potentials proper to comparative inquiry.¹⁶ Rolland Paulston's concluding chapter on "Constructing a Social Cartography of Difference," on the other hand, contains a final summary of the analytical work he has pursued for more than a decade drawing on various strands of post-modernist philosophy.¹⁷ The piece, one of the last major essays the author ever wrote, represents figuratively his intellectual bequest to the field. Unfortunately, Rolland Paulston passed away in 2006, leaving to all those who were fortunate to have had the chance to meet him the memory of a comparative scholar as lively and sympathetic as any man yet independent and rigorous in intellectual matters.

School Reform: Science, education and making society by making the child (London: Routledge, 2008).

15. See the interdisciplinary volume on *Vergleich und Transfer. Komparatistik in den Sozial-, Geschichts- und Kulturwissenschaften*, ed. by Jürgen Schriewer & Hartmut Kaelble (Frankfurt a. M. & New York, Campus, 2003) as well as the collection of essays on *Comparative Methodologies in the Social Sciences—Cross-Disciplinary Inspirations*, ed. by Jürgen Schriewer as special issue no. 32 of *Comparative Education* 42(2006), no. 3, including my introductory article on "Comparative social science: characteristic problems and changing problem solutions", *ibid.*, pp. 299-336. Cf. also Jürgen Schriewer, "Reference Societies and Model Constructions: Questioning International Policy Studies", in *The Public Sector in Transition. East Asia and the European Union Compared*, ed. by Joachim-Jens Hesse, Jan-Erik Lane & Yoichi Nishikawa (Baden-Baden: Nomos, 2007), pp. 85-102.

16. Cf. the literature in footnote 10 above.

17. Cf., in addition to numerous articles and conference presentations, *Social Cartography. Mapping ways of seeing social and educational change*, ed. by Rolland G. Paulston (New York & London: Garland, 1996).

By thus stressing the continued relevance of the research approaches expounded in *Discourse Formation in Comparative Education*, the summary explanations given so far warrant not only a third edition of the volume but also an unaltered reprint edition of the very substance of the book – thus allowing the reader to make identical quotations, respectively to identify quotations, across all three editions. Just as I already wrote in my short *Preface* to the second edition, it is my pleasure to seize the opportunity of this new edition to give my thanks once more to all co-authors for their valuable contributions. Likewise, I am grateful to Peter Lang Publishers, and particularly to Dr. Benjamin Kloss from Peter Lang's Berlin Office, for the constant support they have been willing to provide in running the *Comparative Studies Series* as a whole.

Berlin and Stazzema (Tuscany), Summer 2008

Jürgen Schriewer

PREFACE TO THE FIRST EDITION

Discourse Formation is a term originating from the history and sociology of the sciences and from findings generated by these disciplines. Discourse formation thus refers to insights into the constructedness of academic knowledge, as well as to models meant to conceptualize such insights.¹ More specifically, this term emphasizes the fact that institutionalized fields of academic study, in general, and the social sciences including comparative education, in particular, are a historical as much as an intellectual enterprise. These fields, in varying forms and to varying degrees, bear the imprint of specific institutional settings, changing intellectual trends, and diverse socio-political conditions. It is social actors from different arenas – politicians as well as academics, ministry officials as well as leading intellectuals, and publicists as well as spokesmen of particular professions – who, through dialogue and lobbying, contribute to either bringing to the fore or to eclipsing particular paradigms, intellectual currents, or theoretically defined research programs.

Thus, including a concept like *discourse formation* in the title of a volume dedicated to re-considering the intellectual shaping of and fruitful research agendas for comparative education, means adopting a distinctive intellectual vantage point. This vantage point allows theorists in the field to relativize orthodox methodologies and to historicize taken-for-granted concepts and models. It is a vantage point, furthermore, which brings

1. See, e.g., *Discourses on Society: The Shaping of the Social Science Disciplines*, ed. by Peter Wagner, Björn Wittrock & Richard Whitley. *Sociology of the Sciences: A Yearbook*, vol. XV (Dordrecht etc.: Kluwer, 1991); *Social Sciences and Modern States: National Experiences and Theoretical Crossroads*, ed. by Peter Wagner, Carol Hirschon Weiss, Björn Wittrock & Hellmut Wollmann (Cambridge, UK: Cambridge University Press, 1991).

attention to the interplay of theories and methods, and therefore invites analyses, not only of the theory shifts reiteratively occurring in the field, but also of the methodological consequences entailed by these shifts. Finally, the adopted vantage point involves detached examinations which confront the theoretical-*cum*-methodological programs developed for comparative inquiry with the outcomes of substantive social research and, on this basis, try to assess the relative merits implied by alternative paradigms.

To be sure, analytical perspectives of this kind are reflected unevenly in the essays of this volume; they are particularly conspicuous in the first and in the last part. Part I deliberately intends to link the outcomes of substantive comparative research with interdisciplinary theory developments in the social sciences, and to discuss their changing connections from a history-of-science perspective. It thus functions, to some extent, as a systematic introduction both to the volume and to the field as such. Part IV, on the other hand, aims at a visual representation of the multitude of theoretical positions, conceptualizations, and interpretations that have, over the years, been developed in or adopted by the field. In so doing, it provides the reader with a graphic guide along with a concluding overview of the field. Thus, while adopting an almost monographic character, these two parts provide a frame for Part II and Part III.

These two middle sections express and critically discuss quite a range of theoretical positions which have come to play a particularly prominent role in the field. Thus, in Part II, the theory of long waves in economic development, world-system models, neo-institutionalism, and historical sociology are portrayed by leading representatives of these strands of thought, while the essays of Part III set forth critical hermeneutics, feminist thought, post-modernist theorizing, and the sociology of knowledge. In so doing, these chapters also outline alternative research agendas for the comparative study of the social and educational fabric of the modern world. The chapters grouped in Part II, in one sense or in another, all focus on the overarching macro-level processes such as bureaucratization, rationalization, or standardization that, cutting across the tradition-bound diversity of nations, societies, or civilizations, have shaped that modern world. The essays of Part III, in contrast, set forth

research approaches which emphasize the cleavages partitioning the world today. They highlight, accordingly, aspects of power and inequality, of struggle for differential identity, and of power-imposed hybridization, both within national societies and between the global and the local.

Despite the contrasting outlook of these different research agendas, the essays – whether they expound alternative conceptualizations of world-society or debate adequate interpretations of post-modern thought – create dialogue between themselves. The intellectual coherence of the volume results, then, not only from the chapters' shared problematique; it also emerges from the chapters' disposition of both responding to and complementing one another.

The volume is truly international in scope. Its authors, who come from Europe and the United States as well as from Australia and New Zealand, are internationally renowned specialists either in comparative education or in comparative history and sociology. Moreover, half of the book's chapters were presented in a first draft form at the IXth World Congress of Comparative Education held in Sydney in July 1996. More precisely, they were read at the meetings of the *Commission on Theories and Methods in Comparative Education*, one of the Research Commissions of the *World Council of Comparative Education Societies*. They were re-discussed in a special pre-conference seminar organized, in conjunction with the *Consejo Mexicano de Investigación Educativa*, prior to the Conference of the United States-based *Comparative and International Education Society* held at Mexico City in 1997.

While testifying to the multiple activities of national and international comparative education associations, the volume as a whole is by no means just another specimen of mere conference proceedings. In order to arrive at a more coherent layout, about half of the authors were invited to contribute to this volume only after the aforementioned meetings, and independently of them. Additionally, a certain number of stimulating papers presented at Sydney and Mexico City which deal with the field's disciplinary structuration in different national and civilizational settings have either not been completed in time or were too isolated in their thematic scope to fit in with the intellectual structure of the present volume. They will therefore be included in a follow-up volume, to be

entitled *Discourses in Context*, which will be devoted particularly to the socio-historical study of the field's discipline formation processes in varying national contexts.

Unmistakeably, the present volume succeeds the earlier volume on *Theories and Methods in Comparative Education*, first published in 1988. This holds true not only in terms of its general orientation, i.e. the preference given to descriptive analysis over prescriptive considerations, but also due to its original connection with the activities of the *Commission on Theories and Methods in Comparative Education* linked to past World Congresses. This predecessor volume proved to be a great international success. It has been re-edited twice, in 1990 and 1992, as well as translated into Chinese, Italian, and Japanese. Moreover, a largely modified volume, which includes several chapters of the original English edition and eight new essays read at the VIIth World Congress of Comparative Education, held at Montréal in 1989, was published in Spanish in 1993.² It is hoped that this new volume will be met with the same degree of international response, thereby fostering the academic strength and worldwide consolidation of a field of study that has to face new challenges – challenges which are, as argued in the following chapters, as much intellectual as political in nature.

The completion of this volume would not have been possible without the fruitful and pleasant cooperation of both the authors and the staff of the Comparative Education Center at Humboldt University, Berlin. While the former repeatedly read the proofs – amending their chapters and further elaborating their ideas – staff members Barbara Schulte and Henning Hube were most helpful in editing the texts, especially those

2. *Theories and Methods in Comparative Education*, ed. by Jürgen Schriewer in cooperation with Brian Holmes. Komparatistische Bibliothek/ Comparative Studies Series, vol. 1 (Frankfurt am Main, Bern etc.: Peter Lang, 1988; 2nd edition 1990; 3rd edition 1992). For the Chinese edition, see: *Bijiao jiaoyu lilun yu fangfa*, Jürgen Schriewer yu Brian Holmes zhubian (Taipei: Shida Shufan Faxing, 1993). For the Italian edition, see *Educazione Comparata: Teorie e Metodi*, a cura di Juergen Schriewer e Brian Holmes (Catania: Edizione Latessa, 1996). The Japanese edition, translated by Toru Umakoshi and Shigetaka Imai, is to come out shortly with Toshindo Publishing Co. Ltd., Tokyo, in 2000. Finally, the Spanish volume was published as *Manual de Educación Comparada. Vol. 2, Teorías, Investigaciones, Perspectivas*, ed. by Jürgen Schriewer & Francesc Pedró (Barcelona: Promociones y Publicaciones Universitarias, 1993).

written by non-native speakers of English, in establishing the layout, and in formatting the manuscript. I want to give all of them my warmest thanks.

Berlin, Fall 1999

Jürgen Schriewer

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