

A Critique of Research Strategies in Comparative Education

by Val D. Rust, Aminata Soumare, Octavio Pescador, and Megumi Shibuya

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Val Rust, Aminata Soumare, Octavio Pescador, and Megumi Shibuya's article, "Research Strategies in Comparative Education" is a very important piece of scholarship in the field of comparative and international education. Historically, there has been much scholarly debate regarding the theoretical approaches found in the field and, on a smaller scale, discussion on the research methodology. Rust et al., however, was the first study to conduct a content analysis of the comparative and international education literature in order to gain an understanding of the research methodology and strategies, specifically data collection and analysis, employed by researchers in the field. As with Rust et al., this critique was informed by the historical works of George Bereday, Brian Holmes and Harold Noah and Max Eckstein that focused on research methods in comparative and international education.¹ However, this critique will consult the pre-1990 comparative and international education literature very little.²

Interestingly, Val Rust also holds a similar research interest in the foreign study outcomes research literature. Specifically, in 2002 Rust submitted a proposal to the David L. Boren, National Security Education Program (NSEP) Institutional Grant competition, during its last funding cycle, proposing to survey the research literature related to outcomes of foreign study. This was to be a joint project of the UCLA Center for International & Development Education (CIDE) and the UCLA Graduate School of Education & Information Studies (GSEIS) but in the end was not selected for funding.³

¹ George Z.F. Bereday, *Comparative Method in Education* (New York: Holt, Rinehart & Winston, 1964); Brian Holmes, *Problems in Education: A Comparative Approach* (London: Routledge & Kegan Paul, 1965); and Harold Noah and Max Eckstein, *Toward a Science of Comparative Education* (London: Collier Macmillan, 1969).

² Rust et al.'s research analyzed the relevant research literature up to 1995. For this critique, I felt it was important to consult the current literature in order to gain a better understanding of the current state of the field and the literature.

³ Val D. Rust, "Research Regarding Outcomes of Effects of Foreign Study on Participating Students" (working document in the series: CIDE Study Abroad, CIDE Contributions No. 1. UCLA Center for International & Development Education (CIDE) and UCLA Graduate School of Education & Information Studies (GSEIS), 2002). The status of Rust's proposal/project to survey the research literature on foreign study is currently unknown.

Research Questions

Rust et al. considered five issues related to comparative theory and research methodology in the field of comparative and international education for their study. First, they wanted to investigate the “extent research methodology has been part of the discourse in the field of comparative education.”⁴ This was certainly an important and critical step for them to take as they began their investigation. Secondly, they wanted to “gain some perspective on the actual research strategies used by those who publish in the field of comparative education.”⁵ Focusing on the methodology that comparative and international education researchers actually employ during their research is a logical step to take in such an investigation. Third, Rust et al. approach research methodology in much the same way as Isaac Kandel⁶ in that “different [research] questions require somewhat different ways of answering those questions.”⁷ Rust et al.’s assumption that, historically, research methods in use in the early 1900’s were much more “limited” than the research methods currently available in 1999 seems to be quite logical and unnecessary to formally investigate. The fourth question that the authors wished to investigate was the historical development of the research and its country/regional focus. In other words, Rust et al. wanted to see if, and if so by how much, attention was paid to the “developed world” in the early years of the research in the field and how the focus has shifted to other areas of the world over time. This question stems from the influence of development education in the field of comparative and international education. This question is quite worthy of investigation and I believe the findings are of interest to numerous researchers. Finally, Rust et al. wished to test the hypothesis that qualitative methods remained the dominant and preferred research strategy

⁴ Rust et al., pp. 88.

⁵ Ibid., 89.

⁶ Isaac L. Kandel, *Comparative Education* (Boston: Houghton Mifflin, 1933).

⁷ Rust et al., pp. 89.

employed by colleagues in the field. Perhaps of all the questions pursued by Rust et al., this final one is the most interesting. Specifically, knowing the favored research methods employed helps us better understand our field and provides valuable data to fuel the theoretical debates in the field.

Data Sources and Sets

Rust et al. reviewed three journals *Comparative Education Review* (CER), *Comparative Education* (CE) and *International Journal of Educational Development* (IJED) for their study. It was critical to include the *Comparative Education Review* in the analysis since it is perhaps the most respected journal in the field; not necessarily because it would provide an American focus. I do believe, however, that a review of the research literature base is both valuable and necessary (and comparative) if one is to truly understand the research methodology employed in the field. It was good to see journals from the United Kingdom included in the analysis. However, the three journals selected are all from developed western countries. While not entirely feasible, it would have been good to see the research from non-western countries incorporated and analyzed in this research study. Inclusion of non-western thought and perspectives would have been a very important and should have been considered. Rust et al. briefly address the potential difficulties associated with translation of non-English texts. Analyzing only American and British research does not do the field of comparative and international education any service as only a western viewpoint and approach to research are discussed.

Rust et al. select three different data sets from these journals for analysis. The first data set, which is quite admirable, consisted of all 1,969 articles found in these journals from the first issues and volumes to 1995. While this most certainly was a large and time consuming

data set to obtain it is perhaps the most appropriate for the proposed study. The second data set specifically consisted of the research studies (112) from both *Comparative Education* and the *Comparative Education Review* from 1964 to 1966. The *International Journal of Educational Development* was excluded from this data set as Rust et al. were wanting to gain a historical perspective and understanding of the methodological approaches used during this period. In order to gain a more current understanding of the state of the field and the methodological approaches used by researchers, Rust et al. analyzed the 427 research studies found in all three journals over a ten year period from 1985 to 1995. Interestingly this data set was selected from alternating years such as 1985, 1987, 1989, etc. through 1995. They don't provide an explanation for this approach and it is debatable if all research studies published during this time period should have been analyzed. This is especially true since Rust et al. already read and analyzed all 1,969 articles from these three journals. In the end, however, Rust et al. had a total of 427 research articles to analyze and this is certainly a healthy sample size.

Data Analysis

Rust et al. conducted a content analysis on all of the articles selected for their study. This seems to be the most appropriate methodology to use for their purposes. Interestingly, for all of the data sets, Rust et al. also “provide descriptive statistics and the results of simple chi-square tests, which tested the significance of differences among the variables.”⁸ It is quite surprising to find Rust using statistics, and in particular using simple chi-square tests, in his analysis. Since this was a collaborative project for Rust he may have had to compromise with his fellow researchers and include some quantitative methods (descriptive statistics and “simple” chi-square tests) or he wanted to demonstrate a mixed-methods approach to his data

⁸ Ibid., pp. 90.

analysis to in order to demonstrate a more nomothetic approach or he truly believes in the value of quantitative data analysis and results based on statistics and was simply employing the most appropriate methods to answer his questions.⁹

I find the data tables most helpful to understanding the results of the study as they provide a good visual for the presentation of the data. It is not surprising to such low percentages (*Comparative Education Review* at 4.0%, *Comparative Education* at 2.5% and *International Journal of Educational Development* at 2.3%) of articles specifically devoted to research methodology. It is important for these publications to support and publish such articles from time to time but their main focus is to provide the comparative and international education community with a variety of sound research studies from which to inform both policy and practice. Rust et al.'s additional analysis and break down of these 65 journal articles devoted to research methodology provides interesting background results.

Rust et al.'s main question for this study focused on the data collection strategies found in the journal articles. This is really the "meat" of the study and the analysis that has received the most attention in the field. As previously stated, Rust et al. were wanting to gain both a historical and contemporary perspective on the research methodologies used by colleagues during their research. Again, they were most interested in data collection strategies and data analysis techniques used by researchers in their published works. I found the authors' content analysis approach to be not only the most appropriate method but also structurally sound in design. Having two people review and code each article with a third reviewer added to the analysis if there was not agreement on the methods increased reliability. There was no

⁹ Val Rust was the lead author of the study so while certain compromises must be made by all scholars of the group in a collaborative effort the lead author can sometimes guide the direction of and the approaches used in the study.

discussion or mention if there ever was an instance where all three reviewers could not come to an agreement and only said that the third reviewer had the “ultimate coding decision.”¹⁰

Rust et al. describe their assumption that comparative education research is a “subset of social science research” and that it is “the systematic observation of social and educational life for the purpose of finding and understanding patterns in what researchers observe.”¹¹ Also, it seems that Rust et al. consider comparative education research to exist only when direct comparisons are made between two or more countries. This approach to their comparative research studies was identified by Bradley Cook, Steven Hite and Erwin Epstein.¹² Epstein, in the months after the Rust et al. article was published, offered a sharp critique of his colleagues research and argued that their analysis was “fundamentally flawed...[and] that they misrepresent “comparison” by their classification method, coding studies as “comparative” only if they engage in “comparative data collection.”¹³ William Cummings contributes to this debate by stating that “we rarely compare; we tend more often to do “foreign” than comparative or international research, and we focus more on the context of education than on education itself.”¹⁴ Working from their definition, Rust et al. developed a working typology of social science research methods based on their readings of several publications specifically related to research methodology and design in the social sciences. They found their typology to

¹⁰ Ibid., pp. 92.

¹¹ Ibid., pp. 93.

¹² Bradley J. Cook, Steven J. Hite, and Erwin H. Epstein, “Discerning Trends, Contours, and Boundaries in Comparative Education: A Survey of Comparativists and the Their Literature,” *Comparative Education Review*, vol. 48, no. 2 (2004): 123-149.

¹³ Erwin H. Epstein, *How Far Can we Learn Anything of Practical Value (or Theoretical) Value from the Study of a Foreign System of Education?* Keynote address at the Western Regional Meeting of the Comparative and International Education Society, Provo, Utah, October 22, 1999. The address was given under the title, “Constructing Comparative and International Education for the Future.”

¹⁴ William K. Cummings, “The InstitutionS of Education: Compare, Compare, Compare!,” *Comparative Education Review*, 43, no. 4 (1999): 413-437.

be somewhat inadequate when applied to the comparative education research. Rust et al. go on and state that,

While the texts dealing with social science research design place importance on theory and the link between theory and research, they do not treat theory building as a research strategy. Certain comparative educators would define their theory building activities as research, which suggests that studies in comparative education may have certain peculiarities when compared with mainstream social science research strategies.¹⁵

As a result, Rust et al. modified their typology (“comprehensive typology” in their terms) and created the following categories: Theoretical or Conceptual Studies, Experimental Studies, Existing-Data Search, Literature reviews of Contemporary Conditions, Historical Studies, Comparative Research Studies, Project Evaluations, Content-Analysis Studies, and Field Research Studies which was subdivided into Participation/Observation, Interviews, and Questionnaires.

Not surprising, Rust et al. found that the predominant research strategy utilized in the published studies was that of the literature review (50.8% of the studies) and the second most frequently utilized methods was comparative research/field research (38.4% of the studies).¹⁶ Interestingly, Rust et al. use both comparative research and field research interchangeably in the text to describe the second most popular research strategy. Rust et al. do make a point of discussing the lack of experimental studies conducted in laboratory settings and manipulating variables and the lack of quasi-experimental research strategies. In fact, to further highlight this phenomena they provide specific examples, albeit brief, of two experimental based studies in the field that failed.¹⁷ One can only speculate as to why Rust et al. provide two specific

¹⁵ Rust et al., pp. 94.

¹⁶ Ibid., pp. 97.

¹⁷ Experimental studies referred to are Ralph W. Harbison and Eric A. Hanushek, *Educational Performance of the Poor: Lessons from Rural Northeast Brazil* (Oxford: Oxford University Press, 1986) and Maria Teresa Tatto et al.,

examples of failure relating to experimental studies and not examples (either successful or unsuccessful) of the other research strategies. One could argue that Rust et al. provides these two examples in an effort to reject positivism as a valid epistemology in the field of comparative and international education.

Debates on Comparative and International Research Strategies

It is clear that Rust et al. hold an interpretive or ideographic preference to comparative and international education research. This is evidenced by specifically citing the failures of two experimental studies, as previously mentioned, and statements such as “the debates of research methodologies remain a central aspect of the induction process into the field of comparative education.”¹⁸ One could similarly ask, “are there not also debates of research methodologies related to the deductive process in the field?” Rust et al. also make sure to highlight that Vandra Masemann’s “Critical Ethnography in the Study of Comparative Education” was cited by two authors who used her work as the theoretical backbone to their own research.¹⁹ It was good for Rust et al. to provide more background on the “quantitative” (positivist) vs. “qualitative” (relativist) debate. Rust et al. point out that studies in the field find “great overlap in qualitative and quantitative analysis” yet they continue this discussion by pointing out the “distinction between the two orientations.”²⁰ One glowing references to the qualitative approach in comparative and international education research that is found sprinkled throughout their report such as

Scientific analysis may rely on mathematical and formal logical models or theories, but it may also involve nomothetic studies using common language, where scholars attempt to communicate their abstract concepts to a public that does not understand the

“Comparing the Effectiveness and Costs of Different for Educating Primary School Teachers in Sri Lanka, *Teaching and Teacher Education* 9, no. 1 (1994): 41-64.

¹⁸ Rust et al., pp. 101.

¹⁹ Ibid., pp. 102.

²⁰ Ibid., pp. 105.

language of mathematics and formal logic. These types of studies could fit comfortably into the framework of qualitative studies.²¹

Rust et al. do offer the following *positive* thought about quantitative methods, “even with an *overwhelming* tendency toward qualitative research, it is also clear that quantitative studies play a minor though important role in the field.”²² Many scholars in the field hold opposing viewpoints to Rust et al. on the value of qualitative studies. Scholars such as George Psacharopoulos who, in “expressing his uneasiness,” about the studies found in both the *Comparative Education Review* and *Comparative* states that his conclusions are that,

the articles in the two sample volumes of these journals are overly descriptive, in the sense that they provide long, nonquantitative accounts of the educational system of a single country. Seldom are the papers analytical, in the sense of statistically testing hypothesized relationships. As a result, few comparative lessons can be drawn to assist decision makers in educational planning.²³

It is important to understand that Psacharopoulos bases his remarks on the review and analysis of only two journal issues. Further, scholars such as Harold Noah and Max Eckstein offer a simple, yet concise, argument on the value of quantitative data. They posit that the ranking of a field of inquiry within academia is determined by the “hardness” of the data and the “rigor” of its methods.²⁴

Conclusion

Again, this study by Rust et al. is a significant piece of scholarship and contribution to the field of comparative and international education. This is not to say that their work is not subject to critique, debate or even replication - perhaps by researchers holding a more

²¹ Ibid., pp. 106.

²² Ibid.

²³ George Psacharopoulos, “Comparative Education: From Theory to Practice, or Are You A:\neo.* or B:\ist?,” *Comparative Education Review* 34, no. 3, (1990): 369-380.

²⁴ Harold J. Noah and Max A. Eckstein, *Toward a Science of Comparative Education in Doing Comparative Education*. CERC Studies in Comparative Education 5. Comparative Education Research Centre, the University of Hong Kong. Excerpts from Harold J. Noah and Max A. Eckstein, *Toward a Science of Comparative Education*. (New York: Macmillan, 1969): pp. 3-7, 80-82, 112-122, 183-191.

positivistic epistemology. Quite the contrary, their work has served as a stimulus in this debate and has been consulted frequently in the seven years since it was first published. An opinion contrary to my own is that of Keith Watson who states that “the widely held criticisms that comparative education is too fragmented and irrelevant for policy makers is harder to refute...There are many reasons for this: personality clashes, arguments over terminology, too much emphasis on methodology and not enough on substance.”²⁵ I disagree with Watson and believe that theoretical and methodological debates are not only valuable and but also necessary for any field of study and not just comparative and international education.

²⁵ Keith Watson, “Comparative Educational Research: The Need for Reconceptualisation and Fresh Insights,” *Compare* 29, no. 3, (1999): 233-248.