NATION-STATE APPROACH AND WORLD SYSTEMS ANALYSIS: A NEW PERSPECTIVE ON COMPARATIVE EDUCATION

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More than fifteen years ago the *Comparative Education Review* published a special issue --- The State of the Art: Twenty Years of Comparative Education --- reflecting on the development of comparative education. Since the publication of the special issue, methodological issues of comparative education continue to be a hot topic. Due to the interdisciplinary nature of the area of comparative education, various methods, theories, and approaches have been employed to conduct comparative education studies. As a result of the borrowing from other disciplines, methodological pluralism prevails, which leads to explicit or implicit methodological debates and conflicts.

Taking the debate around nation-state approach and world systems analysis as a case, this article first analyzes the difference between the proponents and opponents on the conception of world systems analysis. The proponents view world systems analysis both as an approach to study and as an inevitable conclusion of the unequal relationship between the industrialized countries and third-world nations. It is this "inevitable conclusion" that the opponents dub the "new simplicitude." The paper then argues that a more constructive relationship, as that of Newton's and Einstein's theories, could be applied to the case of nation-state approach and world systems analysis. This article ends with the implications drawn from this case study for the development of comparative education.

Il y a un numéro spécial de la revue *Comparative Education Review* publié il y a plus de quinze ans sur --- The State of the Art: Twenty Years of Comparative Education [Dernier cri: vingt ans d'éducation comparée] --- sur le développement de l'éducation comparée. Depuis la parution de ce numéro spécial, les sujets méthodologiques de l'éducation comparée restent toujours une question brûlante. A cause de la nature interdisciplinaire de ce domaine, on a employé de nombreuses méthodes, théories, et approches pour conduire des recherches sur l'éducation comparée. L'emprunt aux autres matières a conduit à un pluralisme méthodologique, ce qui amène des débats ou des conflits explicites ou implicites.

Prenant le cas du débat autour de l'approche état-nation et de l'analyse des systèmes universels, cet article analyse d'abord la différence entre les protagonistes et les antagonistes sur la conception de l'analyse des systèmes universels. Les protagonistes regardent cette analyse à la fois comme une approche d'étude et comme une conclusion inévitable de la relation inégale entre les pays industrialisés et les nations du Tiers-Monde. Les antagonistes qualifie "conclusion inévitable" comme "nouvelle simplicité." L'auteur donne ensuite des raisons d'après lesquelles une relation plus constructive, comme celle des théories de Newton et d'Einstein, pourrait s'appliquer au cas de l'approche état-nation et de l'analyse des systèmes universels. L'article se termine par les implications prises dans cette étude pour développer l'étude comparée.

More than fifteen years ago, the *Comparative Education Review* published a special issue --- The State of the Art: Twenty Years of Comparative Education --- reflecting on the development of comparative education. Since the publication of this special issue, methodological issues of comparative education have continued to be a hot topic, frequently examined in presidential addresses at Comparative and International Education Society (CIES) annual meetings (e.g., Farrell, 1979; Eckstein, 1983; Kelly, 1987; Hackett, 1988; Masemann, 1990; Rust, 1991). There is an assumption underlying these presidential addresses that the area of comparative education needs methodological reflection, particularly from senior members of the area.

Due to the interdisciplinary nature of the area of comparative education, various methods, theories, and approaches have been employed to conduct comparative education studies (Halls, 1990). As a result of the "borrowing" from other disciplines, methodological pluralism prevails, which leads to explicit or implicit methodological debates and conflicts. How should we, as a community of comparative educators, view this methodological pluralism? There have been different responses to the methodological pluralism such as calling for consensus and unity (Epstein, 1983), seeking a unique methodology for comparative education (Gerth, 1973; Kienitz, 1984), and viewing the methodological pluralism as an indication of the vitality of the area (Kelly & Altbach, 1986; Altbach, 1991). Taking as a case the debate around nation-state approach and world systems analysis, this article intends to offer a new perspective on methodological pluralism, arguing that a more constructive relationship, as that of Newton's and Einstein's theories, could be applied to the case of nation-state approach and world systems analysis.

A brief historical background

The investigation of problems associated with research into comparative education dates back over 170 years to Marc-Antoine Jullien's *Plan and Preliminary Views for a Work on Comparative Education* in which he discussed the collection, analysis, and presentation of cross-national data (Fraser, 1964, pp. 36-38). In 1841 Victor Cousin, another French comparative educator, outlined for future students of comparative education the types of questions one must seek to answer and the materials one must have at hand when studying a foreign school system (Brewer, 1971, p. 85). Since Jullien's and Cousin's work, paradigmatic changes have occurred and comparative education has developed from tourists' anecdotal description to interdisciplinary and systematic investigation. As a manifestation of these paradigmatic shifts, many approaches, theories, and methods have been "borrowed from other disciplines and utilized in the area of comparative education (Kazamias & Schwartz, 1977; Halls, 1990).

Although Cousin and Jullien were concerned about the issues related to comparative education, more systematic research into comparative education began with such figures as Michael Sadler, Isaac Kandell, and Robert Ulich. These scholars were interested in explaining why the educational systems of certain countries existed

as they were, although they approached the similar question by looking at quite different aspects. For example, Sadler inquired into national character and its influence on the educational system (1907), Isaac Kandel looked at political, social, and cultural forces (1933), and Nicholas Hans studied natural factors, religious factors, and secular factors (1951). As late as the 1960s, the systemic and historical approach by Sadler, Kandel, and Hans was still in force. For example, Arthur Moehlman's study (1963) employed some long-range factors to understand various systems of education. However, the list of the factors whereby researchers look at educational systems have been expanded greatly. While Kandel talked about political, social, and cultural forces, Hans proposed a framework of natural factors (racial, linguistic, and economic), religious factors (catholic, Anglican, and puritan), and secular factors (humanism, socialism, nationalism). Moehlman's long-range factors dealt with more aspects: folk, space, time, language, art, philosophy, religion, government, economics, technology, science, health, and education. Nonetheless, there is a commonality among the aforementioned scholars: they attempted to understand different systems of education by looking at both historical and contemporary factors. By making the following observation, Moehlman (1963, p. 9) expressed the assumption underlying the factor-system approach: "These factors may be visualized as a 'circle of humanity' in a space-time continuum, constantly in a process of acculturation The impact of these long-range factors determines the profile of education."

It is interesting to note that Moehlman's list of long-range factors includes research territories of philosophy, linguistics, political sciences, anthropology, economics, and sciences and technology. As it is a fact that all branches of studies originate from the all-inclusive philosophy, the individual precursors of comparative education attempted to employ, to a more or less degree, an all-inclusive approach to understanding different systems of education. However, with the great development of social sciences as well as statistical theories and techniques, it is difficult or impossible for each individual researcher to study most of the factors or forces which shape a system or systems of education.

As a result of individual researchers' specialization, researchers begin to be associated with a certain theory, method, or approach. For example, the problem-solving approach is identified with Brian Holmes, and dependency theory is connected with such names as Altbach, Arnove, Carnoy, and Kelly. In addition to dependency theory, the following theories, some of which are not mutually exclusive, often appear in the comparative education literature: convergence theory, transactional theory, Marxist and neo-Marxist theories, reproduction theory, social control theory, modernization theory, post-modernism theory, legitimacy theory, human capital theory, cost-benefit theory, game theory, and world-system theory. Comparative education researchers keep drawing methodological resources from other disciplines and areas. However, with more and more theories and approaches applied to comparative education, researchers respond in different ways to this methodological smorgasbord.

Debates on methodological issues

There is a large amount of literature summarizing explicit and implicit methodological debates (e.g., Holmes, 1981; Epstein, 1983; Halls, 1990). Some of the researchers see diversified methodologies as an indication of the vitality of the area (Kelly & Altbach, 1986; Altbach, 1991). Others worry that the methodological discrepancy may hinder the progress of the area (Paulston, 1983). After analyzing the ideologies in comparative education, Epstein (1983, p. 258) made the following observation: "Comparative education has not evolved as a unitary field but as a loose unity of separate though thriving currents."

A more intense frustration about methodological diversity is expressed by George Psacharopoulos (1990). He is perplexed by the terms (or in his word "labels" such as relativist, neo-positivist, neo-Marxist, cultural imperialist, phenomenologist, determinist, and educologist) associated with different theories and methods, and argues, by drawing examples from educational planning, that these terms do not really matter; what matters is a scholar's position on a substantive issue.

In response to Psacharopoulos' articles, Benson (1990) raises questions about Psacharopoulos' assumptions about social change, organization, policy making, and human needs and motivations, and manages to show, among other things, that Psacharopoulos' assumption of social change belongs to the modernization theory which assumes all developing countries pass through the same stages and that they are therefore comparable at the same development stages. Paulston (1990) is concerned about the consequence of Psacharopoulos' approach: "Simply put, his solution would be to reorient research in comparative education by narrowing world-view-framing options to structural functionalism *à la* Anderson and Bowman strictures of 1967, to replace theory with pseudo-covering laws and abstracted empiricism, and to restrict ways of knowing to statistical correlation and hypothesis testing."

The debate between Psacharopoulos and others is an unavoidable and logical result of the methodological pluralism. Even the scholars who view methodological pluralism as an indication of vitality of the area worry about the process in which new methodological ideas have been proposed and the comparative education community's response to these methodological innovations. Kelly and Altbach identified in 1986 such new currents as world system analysis and gender studies, and summarized three responses to the new research challenges: to ignore, to debate, and to co-opt. They were particularly worried about the fate of world systems analysis.

World systems analysis: an interesting case

Many studies in comparative education focus on education in a single state. Actually, most of the field of comparative education consists of studies that apply a method or a theory derived from other disciplines or areas to inquire into education in a particular country. Researchers often study the relationship between education and social and individual development and compare education's role in one country with its role in another.

Many scholars, such as Carnoy (1974,1982), Altbach (1977, 1981), Meyer et al. (1979), Zachariah (1979), and Arnove (1980), challenge the dominance of nation-state as the approach to comparative research. They argue that educational systems in one country are often influenced by more factors outside of that country than they are by factors inside it and ask researchers to study these external forces. Carnoy's book, *Education as Cultural Imperialism* (1974), marks the beginning of such scholarship in comparative education. Since Carnoy's work, the number of works along the line of world system analysis has increased tremendously.

Kelly and Altbach (1986, pp. 91-92) did an excellent job of summarizing the development of studies along the line of world system analysis:

In 1979, John Meyer and Michael T. Hannon published *National Development and the World System*. They point out that educational expansion in the post-World War II period could not be explained by reference to a single nation-state or its political structure, to the way in which it organized power, to how its economy was controlled, or to its peculiar social structure. The drive for universal primary education and the unparalleled expansion of education on the secondary and tertiary levels have little to do with national educational policies, either. Meyer and Hannon maintain that given changes in technology and communications and the internationalization of the labour market, education functions within a transnational context. They call on the field to reorient its inquiry by looking at what they call the world system rather than merely at the nation-state.

Meyer and his colleagues, as well as other scholars who focus on world systems analysis, use a range of perspectives in their work. Meyer and his coauthors argue that an individual nation's political and economic systems have relatively little to do with either how education is organized and distributed, or its content. Immanuel Wallerstein, on the other hand, discusses the nature of the world system by using Marxian frameworks, although his work is not directly dealing with education. Most of the scholars directly in the field of comparative education utilize a range of explanatory frameworks in their work on specific aspects of how relationships between nations, regions, classes, or groups within and among societies affect schooling and its social, economic, and political outcomes. Altbach, Arnove, Carnoy, Zachariah, and Silva all argue that national school systems exist within the context of unequal power relations among nations. They argue that either through design, historical circumstances, or the contemporary distribution of resources, including intellectual resources, the Western industrialized capitalist nations dominate the economic and educational systems of the less industrialized countries. Silva argues that education dominance patterns parallel trading blocs. Altbach discusses how the knowledge that schools distribute in the Third World is generated, controlled, and distributed by the United States, Great Britain, and France. Carnoy contends that such controls seek to maintain existing international inequalities and keep the Third World dependent.

In short, the proponents of world systems analysis argue the necessity of going beyond the nation-state as the only approach to comparative education and studying, from a more broad perspective, the issues of regional variations, racial groups, and classes which are not necessarily confined to a single nation's boundary.

According to Kelly and Altbach's summary (1986, p. 101), the response to the world systems analysis is mixed:

Although many recent commentaries in the field have ignored the challenges posed by world system analysis to comparative education, others have attacked it on the basis of the association of world system analysis with a Marxist problematic. Harold Noah and Max Eckstein have dubbed this approach "the new simplicitude." They claim that such an approach, deriving from dependency theory and focusing on the unequal power relations between Third World and industrialized nations, has tended to view Third World nations as passive victims of the industrialized nations and to blame the current economic hardships of these Third World nations on former colonial rulers. Noah and Eckstein deny that there is any empirical evidence of attempts on the part of Western industrialized nations to maintain economic domination that would explain either the poverty or the evolution of schools systems in much of Africa, Asia, and Latin America. Rather, they attribute the problems of the Third World nations to underdevelopment, which predated colonialism and which industrialized nations are, through their aids programs, seeking to remedy.

Additionally, Eckstein and Noah (1985, p. 223) analyze the key terms of the world systems analysis -- center-periphery, reproduction, and hegemony -- and conclude that these terms "are metaphors, figurative descriptions comprising a particular explanatory paradigm."

Similar criticism of world systems analysis is also mounted by Watson (1985), who recognizes the existence of the international ties documented by Arnone, Altbach, and others. However, by examining Thailand, a country that avoided any formal colonial control, and Malaysia, a country that was colonized by the British for more than 170 years, Watson argues that the internal political framework of a society can far outweigh the factors of external control; and that where external involvement is sought it is often done willingly and not necessarily on terms of subservience.

Some critics of world systems analysis attempt to move beyond the international context and examine the conclusions which usually go along with world system analysis. Sica and Prechet (1981) inquire into whether there is any relation between the spread of Western-style education and economic dependency because they note the lack of relation between education expansion and economic development. They find no significant relation between measures of educational enrollments and economic dependency. Olivera (1985), using Latin American education as an example, argues that "in regard to education, it (dependency theory) does not tally, at least in Latin America, either with history or with the present-day situation. It is employed in this context simply because the fashion has caught on" (p. 237).

Another type of response to world system analysis is, as Kelly and Altbach (1986, pp. 103-104) summarize, to co-opt it into the field:

This co-optation has followed a distinct pattern. For example, world systems analysis has suggested a research agenda that includes study of international aid agencies and linkages among Third World and industrialized nations with a view toward understanding the mechanisms through which the world system is maintained. A host of studies have appeared on topics suggested by world systems analysis; but most are devoid of the theoretical frames from which they initially arose. For example, the journals in the field have devoted considerable coverage to the activities of international aid agencies, most recently to the World Bank. This work has, for the most part, described the policies of these agencies and changes in them over time. Some of this scholarship has not sought to explain the impact of such policies. More often than not, the assumption is that these institutions exist outside the frame of international politics and serve simply to develop Third World nations. Another example of co-optation of world systems analysis is renewed interest in "institutional transfers." The British journal, *Compare*, for example, ran a special issue on this topic in 1983. The studies that it included, aside from Robert Arno's on the Ford foundation, attacked the very concept of world systems analysis and focused on transfer instead. The articles, by implication, likened educational borrowing between Great Britain and the United States to that between the United States and Latin America or between Great Britain and Africa. They criticized the presumption that education borrowing takes place within the context of either international politics or unequal relations between nation-states.

It is interesting to note that the three types of response are characterized by Kelly and Altbach, who themselves are proponents of world systems analysis and have conducted many studies along the line of world systems analysis. They are concerned about the silence, criticism and co-optation to which world systems analysis is subject, although they maintain that debate is an indication of the vigour and liveliness of the field.

A new perspective on the case of world systems analysis

Kelly and Altbach's categorizing of three types of response to world systems analysis is appropriate (1986). Many of the papers published in major comparative education journals still employ the nation-state model within the context of structural-functionalism. There has also been criticism of world systems analysis and the phenomenon of "co-optation." However, the implications of and attitude toward the so-called silence, criticism, and co-optation could be quite different from those of Kelly and Altbach's. This author would argue that "silence" is reasonable and logical to a certain degree, and that "criticism" and "co-optation" are not only evidence of vitality but progress as well.

One of the problems pertaining to the world systems analysis debate arises from the fact that the parties involved hold quite different as well as limited conceptions. According to the proponents, world systems analysis is the study of educational affairs in the context of unequal international context. This conception is defined from a specific perspective. It is expected, which is implied by this conception, that studies which employ world systems analysis should come to the same conclusion: educational activities exist in the context of unequal relation disadvantageous to the Third World countries. The studies which fall into the categories of post-colonialism and knowledge creation and distribution usually support the conclusion held by the proponents of the world systems analysis.

The criticism which the world systems analysis received pertains to this very conclusion. Let us examine more closely the criticism accounted by Kelly and Altbach. Noah and Eckstein label world systems analysis as "the new simplicitude" in the sense that the world systems analysis holds limited assumptions about power and how it operates. Watson recognizes the international ties but does not interpret the ties as the proponents of world systems analysis do. He argues that in his two cases the external factors are less influential, and that even if external factors exert influence, there is not necessarily control and subservience. Sica and Prechel attempt to refute the world systems analysis by arguing there is no relation between the spread of Western-style education and economic dependency. It is clear that the opponents of world systems analysis do not disagree with the approach of world systems analysis; on the contrary, they all move beyond the nation-state framework and situate their studies in the international context. Therefore, these "opponents" actually adopt the approach of world systems analysis but come to a different conclusion in terms of research findings.

So is the case of co-optation. Kelly and Altbach (1986) argue that international aid agencies and linkages among Third World and industrialized nations partly explain the mechanisms through which the world system is maintained. However, this scholarship becomes focusing on the development of these agencies themselves. Another co-optation, as Kelly and Altbach perceive it, is that many studies of "institutional transfers" should have come to the same conclusion as the proponents of world systems analysis. Nonetheless, these studies come to criticize the thesis of world systems analysis, i.e., educational borrowing takes place in an unequal international context.

It is apparent from the above analysis that after world systems analysis appeared in the comparative education arena, some studies came to conclusions different from proponents of world systems analysis. However, some of these studies, while coming to different conclusions, do employ the approach which is embedded in world systems analysis, i.e., to situate the study in an international context no matter if the research subject is a nation, an organization, or several nations. Then, an interesting question arises: how should we view the case of world systems analysis from the perspective of the development of comparative education?

Understanding the development of comparative education: a heuristic

As it has been mentioned in the foregoing, there have been quite different responses to the complexity and conflict of theories and approaches, with Epstein (1983) and Paulston (1990) being pessimistic and calling for consensus, and Kelly and Altbach (1986) optimistic and viewing the phenomenon as an indication of liveliness of the area. This author agrees with Kelly and Altbach (1986) that the debate is an indication of the vitality of the area, but in a different way. This author would like to suggest a new perspective to understand the response to world systems analysis.

In the history of sciences, the transformation from Newton's classic theory to Einstein's theory of relativity represents a paradigmatic shift. However, Newton's classic theory, which can explain the movement at a speed less than that of light, is proved to be limited but not wrong. In other words, Einstein's theory of relativity, which takes Newton's realm as a specific, has more explanatory power and is applicable to a wider range of phenomenon. If we apply the implications of the Newton-Einstein case to world systems analysis, we shall have a new perspective on the relationship between nation-state approach and world systems analysis.

The rise of world systems analysis is a response to the limitation of the nation-state approach. The transformation from nation-state approach to world systems analysis is a paradigmatic shift. The nation-state approach has proved to be limited because the world systems analysis is able to situate a study in an international context. However, the nation-state approach is not wrong in the sense that the approach could not contribute to our knowledge of national education systems. On the contrary, the pioneers of comparative education, such as Kandel, contributed tremendously to our understanding of national education systems by analyzing the political, social, and cultural forces in a country.

World systems analysis enlarges the context within which the study is situated and is able to tackle some problems which are beyond the capability of the nation-state approach. For example, Altbach studied the knowledge creation and distribution in the international context, a question which the nation-state approach cannot handle. Nonetheless, the inception of world systems analysis does not mean the demise of the nation-state approach. This is due to two reasons. First, for a relatively closed social system where international factors have little or no influence, the nation-state approach is still a valid one. Second, there is a hermeneutic circle regarding nation-state approach and world systems analysis. The latter must be based on the research findings arising from the nation-state approach. World systems analysis can only be conducted on the basis of an initial understanding of national educational systems. Nonetheless, by taking into account the international factors, the understanding of a single national system will also be enhanced.

Having analyzed the relationship between the nation-state approach and the world systems analysis from a more constructive perspective, this author would like to go back to the response to the world systems analysis as summarized by Kelly and Altbach (1986). First, it seems reasonable that the nation-state approach continues to dominate the literature of comparative education for there are still so many factors and

their relations to be understood within a nation-state boundary. The "silence" to world systems analysis does not mean negligence but the *raison d'être* of the nation-state approach. Secondly, the "debate" on and "criticism" of world systems analysis are not pertaining to the world systems analysis approach itself but rather to some conclusions held by its proponents. There is a difference between the proponents and opponents on this point. The proponents understand world systems analysis both as a research approach and as a research finding. On the other hand, the opponents view world systems analysis only as an approach and critique the assumption that if world systems analysis is employed, the only logical conclusion is that educational interaction exists in an unequal and exploitative international context. It is this assumption that Eckstein and Noah dub "simplicitude." Finally, the co-optation is one of variations of the debate and criticism in which world systems analysis is accepted as an approach but the focus is different from that of the proponents. For example, many of the studies of international organizations are conceptualized within the perspective of international context. However, these studies focused on the history and policy of these organizations rather than taking the organization as a case to manifest the relationship among the nations.

Some concluding remarks

The foregoing inquiry into the case of nation-state approach and world systems analysis has its implications for understanding the area of comparative education and also poses some deep questions for the development of the area. First, it is clear that the theories and approaches mentioned in the previous sections all originate from other disciplines and areas. The methodological pluralism defines comparative education as an area in which various approaches and theories could apply and contribute to our knowledge on education. Nonetheless, this very nature of the area raises such serious questions as "With the theories and approaches borrowed from various disciplines and fields, what is the logic of the development of comparative education?", "What are the promising fields for the future of comparative education?", and "How could comparative education contribute more constructively to the welfare of human beings?".

Secondly, the nation-state approach, which is the precondition of world systems analysis, has its *raison d'être*. As far as a single study is concerned, comparative education does not have to deal with more than one country. As the notes for contributors to *Comparative Study of History and Society* state, "Any article not in itself comparative may be accepted if it leads itself to comment that will place it in comparative perspective." There is a hermeneutic circle between the nation-state approach and world systems analysis. The study conducted by employing either of the approaches will contribute to the inquiry at the other level.

Finally, debate is one of the mechanisms by which comparative education develops. As mentioned above, because of the very nature of the field, researchers in comparative education employ theories and approaches from other disciplines and areas. However, if comparative education only borrows and does not contribute in one

way or another, researchers in other disciplines and areas can divide comparative education and incorporate parts of comparative education into their territories. Comparative education, as an area, should not simply borrow the theories and approaches, rather it should contribute to the way that the theories or approaches are further developed. In the case of world systems analysis, both dependence and independence are found in different contexts, from which a typology of relation among nation-states develops. Such contributions, however, can only be made through scholarly critique.

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