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INTERNATIONAL PERSPECTIVES ON EDUCATION
AND SOCIETY VOLUME 43 PART A

**WORLD EDUCATION
PATTERNS IN THE GLOBAL
NORTH: THE EBB OF
GLOBAL FORCES AND THE
FLOW OF CONTEXTUAL
IMPERATIVES**

EDITED BY

C. C. WOLHUTER

North West University, South Africa

ALEXANDER W. WISEMAN

Texas Tech University, USA



United Kingdom – North America – Japan
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ABOUT THE AUTHORS

Tímea Ceglédi received her PhD degree in Educational Studies (2018). In her research work, she focusses on the Sociology of Resilience. She researches students with outstanding achievements despite their social disadvantages. These students are also known as resilient students. She has vast experience in the field of educational sociology thanks to participating in 35 national and international research projects related to public and tertiary education such as resilience, family, mentoring, graduate career tracking, shadow education, social cohesion, teacher training, disadvantaged backgrounds, catching up programs, talent development, and added value. Currently, she is an Assistant Lecturer at the University of Debrecen and researcher at the Centre for Higher Education Research and Development (CHERD-Hungary). She worked as a Researcher in the Hungarian Institute for Educational Research and Development, and other research centers.

Tatiana Dubayova, PhD, graduated from Psychology at the Faculty of Arts of Prešov University in Prešov in 2001; in 2010, she completed the PhD study at the Faculty of Medical Sciences, University of Groningen, Groningen (the Netherlands) in the area of health sciences focusing on the quality of life of Parkinson's patients. Since 2006, she has been with the Department of Special Education of the Faculty of Education of Prešov University in Prešov, Slovakia. She is the Author and Co-author of several research studies published in peer-reviewed journals. Since 2013, she has cooperated with the Roma Education Fund in Prešov as a Lecturer of Mentorship Courses in which she has been preparing high school teachers for the mentor's role. She worked at the civic organization Victim Support Slovakia (*Pomoc obetiam násilia*) for several years and underwent a long-lasting training in systemic therapy. At present, she also provides distant consulting to children in the civic organization *Spoločnosť priateľov detí Li(e)nka* (Children's Friends Society).

Klara Skubic Ermenc is an Associate Professor and Head of the Department of Educational Sciences, Faculty of Arts, University of Ljubljana, Slovenia. She teaches several undergraduate and graduate courses: comparative pedagogy, intercultural education, strategies of education development, and integration of theory and practice in vocational education. Her fields of research are: European trends in vocational education; the role and the development of comparative pedagogy; intercultural and inclusive education. As a Researcher or Consultant, she has participated in 17 domestic and European projects. In 2016, she worked as a Visiting Professor at the University of Belgrade. She also lectured at the University of Wroclaw, Poland; North-West University, Potchefstroom, South Africa; Comenius University Bratislava, Slovakia. She has published more than

50 scientific articles and edited chapters in scientific monographs worldwide, (co)authored three scientific and seven professional monographs. She is a Consultant for the Development of Vocational Education and Training in Slovenia, and a Member of Government Expert Team for the development of the Slovenian qualifications framework. Between 2015 and 2017, she was an Editor-in-Chief of the scientific journal *Sodobna pedagogika*/*Journal of Contemporary Educational Studies*, and between 2018 and 2020, she was the President of the Association of Slovenian Educationalists.

Belén Espejo-Villar has been Professor of Education Policy at the Department of Theory and History of Education, Faculty of Education, University of Salamanca. She is a Member of GIPEP, the Transdisciplinary Research Group of the University of Salamanca. She currently holds the position of Deputy Secretary of the Spanish Comparative Education Society (SEEC). She is a Member of the Editorial Board of the *Spanish Journal of Comparative Education* (REEC). She has management experience at the Department of Theory and History of Education. She is the Coordinator of the Bachelor's Degree in Pedagogy. Her research areas focus on public policies and educational reforms, with particular emphasis on the research of the transfer market and new management models in socioeducational policies. Specialized teaching in political economy of education, socioeducational policies, governance and research on educational developments, and the employment dimension of pedagogy.

Katalin Godó is affiliated with the University of Debrecen, Doctoral School of Education, Debrecen, Hungary.

Hedviga Hafičová, PhD, completed her doctoral studies in Theory of Teaching Lower Primary Level Subjects at the Faculty of Education at Prešov University in Prešov, Slovakia, in 2010 and focused on the application of information and communication technologies in primary education. She works at the Department of Natural and Technical Disciplines of the Faculty of Education of Prešov University in Prešov. Her research work focusses on the application of modern technologies in the education of pre-school and young school-age children. She was the Co-investigator in several grant projects. As a Lecturer, she concentrates on the continuous education of teachers of pre-primary, primary, and secondary education levels and develops methodologies of pedagogical practices. Within the projects organized by the Roma Education Fund, she lectured courses covering preparation of teachers for mentoring, co-authored the programme of specialization education and a university textbook for this course.

Moon Suk Hong is an Assistant Professor and the Head of the newly established International Development and Cooperation Major, Busan University of Foreign Studies (BUFS), Korea. Prior to Busan, she taught South-east Asian studies, global development, and education theories and methodology at Seoul National University. Also, she worked as an Adjunct Professor at the Graduate School of Pan-Pacific International Studies, Kyung Hee University, and a Visiting Professor

at the Department of Anthropology at the University of Yangon. Holding a PhD in Global Education from the Seoul National University (SNU), and an MA in Anthropology and Development from the Australian National University (ANU), she has extensively worked in East and South-east Asia in the areas of international development and education. For Korea's international studies community, she currently serves as an External Advisor of the Presidential Committee on New Southern Policy, a Policy Advisor of the Evaluation Committee for the Prime Minister Office's Committee for International Development Cooperation (CDIC), as well as a Co-Chair of the research committee, Korean Association of International Development and Cooperation (KAIDEC).

Martin Kaleja, PhD, works as the Head of the Research Centre for Social Inclusion at Silesian University in Opava, Czech Republic. He is a Special Educational Needs Teacher and Social Pedagogue. In 2001, he started teaching at a primary school as a Roma Teaching Assistant, becoming a Teacher in 2002. Currently, he is a Polish "Profesor Uczelni" at Jan Długosz University in Czestochowa. He managed several projects focusing on school inclusion in four Czech cities, with his tasks including provision of support in education, building teams and connecting them, establishment of a good communication mode, making school environment socially fair for the marginalized students in their education. His academic, research, pedagogical, lecturing, and other professional activities concentrate on the following areas: inclusive approaches at school and social context, special educational needs of people with conduct disorder, manifestations of risk behavior; social justice in education, and multi- and intercultural education.

Yuto Kitamura is a Professor at the Graduate School of Education, The University of Tokyo, Japan. He graduated from Keio University and received his MA and PhD, both in education, from the University of California, Los Angeles (UCLA). He worked in the Education Sector of UNESCO in Paris as an Assistant Education Specialist and taught as an Associate Professor at the Graduate School of International Development, Nagoya University and Department of Education, Faculty of Human Sciences, Sophia University. He is specialized in comparative education and educational development studies. He has conducted his research extensively on education policy in developing countries, particularly in South and Southeast Asia, focusing on Cambodia.

Edina Kovács is a Hungarian Literature and Pedagogy Teacher and Educational Researcher. She received her PhD degree at the University of Debrecen within the Educational Sciences Doctoral Program. Her main research topics include commitment and achievement of in-service and pre-service teachers, and different aspects of teacher training. The dimension of gender is important in this field, because of the feminization of the teaching profession. She won the grant of the International Visegrad Fund in 2014 and examined Slovak and Hungarian students in teacher training. She also won grants of the National Excellence Program in 2013 and 2016. She is a Member of the Editorial Board of the *European Journal of Educational Research* since 2018. During the last six years, she has researched

the development of students' attitudes and the options for reducing their prejudices toward Roma people, and especially Roma students.

Jing Liu is an Associate Professor at the Graduate School of Education, Tohoku University, Japan. Prior to the current position, he served as an assistant professor at the Graduate School of International Development, Nagoya University, Japan, from 2013 to 2017. Then, he worked as a Japan Society for Promotion of Science (JSPS) research fellow at the Graduate School of Education, The University of Tokyo between 2017 and 2019. His research areas include sociology of education, international comparative education and development, and education for sustainability. His current research projects include school collaboration for school improvement in China and Japan, small-scale schools and quality education in rural China, and transformation of higher education for sustainability in Asia.

María-Jesús Martínez-Usarralde has been a Professor of Comparative Education and International Education at Department of Comparative Education and History of Education of the Faculty of Education at the University of Valencia (UV, Spain) since 1998. Member of the Spanish Comparative Education Society (SEEC), she currently holds the position of Deputy member of its board of Directors from 2008 to 2010. She has been Vice Dean of Innovation and Educational Quality in the Faculty of Philosophy and Science of Education of the UV, from 2009 to 2011. From 2015 to 2018, she has been the Director of the Training Center Manuel Sanchis Guarner of the University of Valencia, from which she has been responsible for the policies of university teacher training and educational innovation of the UV. Her research interests focus on the topics of Comparative and International Education and questions related to its methodology, Cooperation for Educational Development, intercultural issues as mediation and educational policies of migration, as well as methodologies of learning and innovation at university like the Service Learning and its relation with Social Responsibility and inclusive policies, having been researcher of various national projects of these topics.

Irina Maslo specializes in the promotion in out-school activities for active work-life participation. Habilitation in individualization of the schooling pedagogical process on the base of international accreditation of national level innovations. Creator and implementer of master programme on Educational Treatment of Diversity. Head of the LU Doctoral school on human capacity and life wide learning in inclusive contexts of super diversity. Supervising of doctoral theses (15 defended and five in development), for example, on youth participation in integration process in multicultural environment; the learning outcomes approach in formal second chance education; opportunities of applying continuing bilingual, intercultural and inclusive education: experiences for inclusion of third-country nationals; transversal skills and main attributes of constructivist transformational learning activities for promoting excellence in adult education and training. The directions of scientific research: LLL strategies for improving

of motivation of 18–24 aged early school leavers and 25–36 aged gifted adults to participate in LLL in diverse inclusive contexts in Asia and Europe. Around 200 publications, 25 years' education and training experiences. Ten years' education and training national and international founded research experiences. The Programme committee convener and reviewer in European Education Research Association (Research network 11 on Educational Improvement and Quality Assurance); University of Latvia management representative in University Council of ASEM Education and Research Hub for Lifelong Learning (ASEM HUB LLL). Last four years – Independent National Experts Network Member in the area of adult education/adult skills, consulting experience in ECORYS and Horizon 2020 program EduMAP – Adult Education as a Means to Active Participatory Citizenship project.

Adam Nir is a Professor of Educational Administration Policy and Leadership and the Abraham Shiffman Chair in Secondary Education at The Seymour Fox School of Education, the Hebrew University of Jerusalem Israel. He is the former Chair of the Department of Education at the Hebrew University and the past President of the International Society for Educational Planning (ISEP). His scholarship focuses on school autonomy decentralization and School-Based Management, educational planning, leadership and human resource management in public education.

Alexander W. Wiseman, PhD, is a Professor of Educational Leadership & Policy in the College of Education and Director of the Center for Research in Leadership and Education (CRLE) at Texas Tech University, USA. He holds a dual-degree PhD in Comparative & International Education and Educational Theory & Policy from Pennsylvania State University, a MA in International Comparative Education from Stanford University, a MA in Education from The University of Tulsa, and a BA in Letters from the University of Oklahoma. He taught secondary English in both the United States and Japan before returning to higher education. He conducts comparative educational research on educational policy and practice using large-scale education datasets on math and science education, information and communication technology (ICT), teacher preparation, professional development and curriculum as well as school principal's instructional leadership activity, and is the Author of many research-to-practice articles and books. He serves as a Senior Editor of the online journal, *FIRE: Forum for International Research in Education*, and as Series Editor for the *International Perspectives on Education and Society* volume series (Emerald Publishing).

C. C. Wolhuter, PhD, studied at the University of Johannesburg, the University of Pretoria, the University of South Africa and the University of Stellenbosch. His doctorate was awarded in Comparative Education at the University of Stellenbosch, South Africa. He is a former Junior Lecturer of History of Education and Comparative Education at the University of Pretoria and a former Senior Lecturer of History of Education and Comparative Education at the University of

Zululand. Currently he is a Comparative and International Education Professor at the Potchefstroom Campus of North-West University, South Africa. In the winter semester of 2012, he taught Comparative and International Education as Visiting Professor at Brock University, Canada. He is the Author of several books and articles in the fields of Comparative and International Education and History of Education, and has served as President of SACHES, the Southern African Comparative and History of Education Society.

ABOUT THE EDITORS

C. C. Wolhuter, PhD, studied at the University of Johannesburg, the University of Pretoria, the University of South Africa and the University of Stellenbosch. His doctorate was awarded in Comparative Education at the University of Stellenbosch, South Africa. He is a former Junior Lecturer of History of Education and Comparative Education at the University of Pretoria and a former Senior Lecturer of History of Education and Comparative Education at the University of Zululand. Currently he is a Comparative and International Education Professor at the Potchefstroom Campus of North-West University, South Africa. In the winter semester of 2012, he taught Comparative and International Education as Visiting Professor at Brock University, Canada. He is the Author of several books and articles in the fields of Comparative and International Education and History of Education, and has served as President of SACHES, the Southern African Comparative and History of Education Society.

Alexander W. Wiseman, PhD, is a Professor of Educational Leadership & Policy in the College of Education and Director of the Center for Research in Leadership and Education (CRLE) at Texas Tech University, USA. He holds a dual-degree PhD in Comparative & International Education and Educational Theory & Policy from Pennsylvania State University, a MA in International Comparative Education from Stanford University, a MA in Education from The University of Tulsa, and a BA in Letters from the University of Oklahoma. He taught secondary English in both the United States and Japan before returning to higher education. He conducts comparative educational research on educational policy and practice using large-scale education datasets on math and science education, information and communication technology (ICT), teacher preparation, professional development and curriculum as well as school principal's instructional leadership activity, and is the Author of many research-to-practice articles and books. He serves as a Senior Editor of the online journal, *FIRE: Forum for International Research in Education*, and as Series Editor for the *International Perspectives on Education and Society* volume series (Emerald Publishing).

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PREFACE

World Education Patterns Global North Volume

The shape and form of education worldwide is the product of many varied as well as intersecting phenomena. As a result, the shapes, forms, and intersections of phenomena that affect education comprise the bulk of the scholarship, research, practice, and evaluation of education within as well as across educational systems around the world. These companion volumes look at the ebb and flow of both context and agenda to both identify and distinguish those educational patterns that may be shared or may conflict among countries and regions. Given that the world is too broad of a landscape to cover in a single volume, there are two companion volumes of *World Education Patterns: The Ebb of Global Forces and the Flow of Contextual Imperatives*. The first volume introduces the phenomenon of world education patterns and examines those patterns in countries and regions that may be broadly characterized as the Global North. The second volume establishes and examines ways that countries and regions in the broadly defined Global South experience education within their unique contexts as well. The goal is that through a thorough examination of educational patterns worldwide, the shapes and forms of education in context can be better understood for improved scholarship and practice worldwide.

Each chapter in both volumes of *World Education Patterns* explains and investigates the educational impact of as many of the following contextual elements as possible, including: geography, demography, economy, technology, society, politics and policy, religion, and culture. Some chapters go beyond this foundation of contextual elements and introduce others or intersect them in ways that make more sense or create unique meaning in their particular context, but all of the chapters in both volumes are grounded in Wolhuter's three aligned chapters included in the Global North volume.

In this volume, C. C. Wolhuter's chapter, "Terra Invicta: Comparative and International Education," introduces and explores the importance of context to the scholarship and practice of comparative and international education. Wolhuter also clarifies the impact of globalization on education in this first chapter. In his second chapter, "Terra Incognita: The Challenging Forces of the Unprecedented Twenty-first Century Globalized Societal Context," Wolhuter continues his examination of globalization and introduces several of the contextual elements mentioned above as a way of outlining a framework not only for further chapters across both volumes, but also to identify and interrogate the global forces that shape and form education worldwide. Wolhuter's third chapter, "Terra Nova: The Global Education Response," looks specifically at ways that

educational experiences, expectations, practices, and policies have responded to not only globalization but also the unique intersections of context and agendas shaping education worldwide.

Other chapters in this volume focused on the Global North include Alexander W. Wiseman's chapter on globalization and educational trends in North America. This chapter examines the diversity of contexts and difficulties of identifying recognizable patterns across such a decentralized and multicultural landscape. María-Jesús Martínez-Usarralde and Belén Espejo-Villar investigate Western European education systems to determine the degree to which there is a coherent political agenda or European strategic framework when it comes to education. Irina Maslo explains the transformation of education in Baltic countries from post-socialist to new-liberal education. Edina Kovács, Hedviga Haficova, Tatiana Dubayova, Tímea Ceglédi, Katalin Godó, and Martin Kaleja focus on the experiences of Roma students as a way to investigate the influence of globalization on education in Central Europe. Klara Skubic Ermenc examines education in South-East European countries in relation to the Europeanization process. Yuto Kitamura, Jing Liu, and Moon Hong highlight school education, in particular, in China, Japan, and Korea, and the ways that socioeconomic inequality and new teaching and learning approaches are transforming it. Finally, Adam Nir, looks at the influence that policy borrowing in the form of school-based management policy has on both the Israeli education system and the Israeli society, more broadly, as well.

Through the thorough introduction and framing work of Wolhuter's first three chapters, the rest of this volume's focus on the Global North becomes more clearly recognizable in terms of educational patterns and intersecting contexts. Yes, there are unique elements in every national educational system and regional educational culture or practice, but the shared expectations and practices are overwhelmingly obvious as well. Those shared experiences are often overlooked because they are taken-for-granted aspects of education worldwide, but they become even more apparent when the practice of education becomes increasingly decoupled from the contexts of education. This may be less apparent in the Global North as investigated in this volume, but will be even more apparent in the companion volume focused on education in the Global South.

Alexander W. Wiseman
Series Editor

TERRA INVICTA: COMPARATIVE AND INTERNATIONAL EDUCATION: A FIELD OF SCHOLARSHIP TESTING UNPRECEDENTED FRONTIERS IN THE TWENTY-FIRST CENTURY

C. C. Wolhuter

ABSTRACT

This opening chapter sets a frame for the chapters of this volume, dealing with how the dynamic dialectic interplay between forceful global societal forces and context shape humanity's education response in various parts of the world. "Context" as a perennial threshold concept in Comparative and International Education is explicated. It will then be explained how, during its long historical evolution, scholars in the field each time had to contend new contexts, or reconceived the notion of "context" in a new way. Subsequently the problems of an overly fixation on the historical and the present, to the detriment of the future, and inertia are extant in the field, will be explained. The unprecedented, seismic changes currently impacting on the societal context worldwide, will then be enumerated. These changes can be subsumed under the collective name of globalization. The concept globalization is then clarified, and the take of the scholarly community on the impact of globalization on education is then mapped and interrogated. The authors' stance on this is stated, namely that a dynamic interplay between global focus and contextual realities shape education in various parts of the world. It is in this theoretical frame that the

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The Ebb of Global Forces and the Flow of Contextual Imperatives

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remainder of the chapters of the volume is presented, combing out the main features of education development in each part of the world, as a dialectic between global forces and contextual imperatives.

Keywords: Comparative and international education; context; globalization; glocalization; world regions; paradigm

INTRODUCTION

Comparative and International Education is a dynamic and growing field found in all corners of the world. In a recent volume edited by the editors of this volume: *Comparative and International Education: Survey of an infinite field* (Wolhuter & Wiseman, 2019), the field is described as an infinite field. Indeed, and in the context of the present world, the field is testing unprecedented frontiers, where education, and therefore also the field of Comparative and International Education, is accorded new relevance and value. The aim of this volume is to zoom in on that frontier, surveying the contextual imperatives, the education response, and the new vistas these are creating for the scholarly field of Comparative and International Education.

This aim of this opening chapter is to provide a frame for the chapters following in the volume. First “context” as a perennial threshold concept in Comparative and International Education is explicated. It will then be explained how, during its long historical evolution, scholars in the field each time had to contend new contexts, or reconceived the notion of “context” in a new way. Subsequently the problems of an overly fixation on the historical and the present, to the detriment of the future, and inertia are extant in the field, will be explained. The unprecedented, seismic changes currently impacting on the societal context worldwide, will then be enumerated. These changes can be subsumed under the collective name of globalization. The concept globalization is then clarified, and the take of the scholarly community on the impact of globalization on education is then mapped and interrogated. In conclusion, a stance of the authors regarding this impact is formulated and this position will provide the frame for the chapters in the rest of the volume.

CONTEXT AS PERENNIAL THRESHOLD CONCEPT IN COMPARATIVE AND INTERNATIONAL EDUCATION

The term threshold concept is here used as it had been introduced in the publication of Meyer and Land (2003). It has since then been belabored in a constant stream of publications, for example by Land et al. (Eds.) (2016). Similarly the use of the concept has been found useful in a range of scholarly fields, under scholars reflecting upon and interrogating their fields (cf. Rodger et al., 2015, p. 546).

A threshold concept is more than just a key concept or core concept in a scholarly field. Meyer and Land (2006, p. 3) describes it as:

[...] akin to a portal, opening up a new and previously inaccessible way of thinking about something. It represents a transformed way of understanding, or interpreting, or viewing something without which the learner cannot progress. As a consequence of comprehending a threshold concept there may thus be a transformed internal view of subject matter, subject landscape, or even world view. This transformation may be sudden or it may be protracted over a considerable period of time a transformed view or landscape ...

One of the properties of threshold concepts is that they are *integrative*: hitherto separate concepts are brought together into a unified whole, revealing the interrelatedness of these concepts (Townsend, 2016, p. 24).

While there are many different views as to what Comparative Education or Comparative and International Education is, here it is understood as a field of scholarship studying education from a three in one perspective (see Wolhuter, 2020):

- An education system perspective.
- A contextual perspective.
- A comparative perspective.

First, Comparative Education has as its subject of study the education *system*. However, the subject of study of Comparative Education transcends the narrow perimeters of the education system as such. The education system is studied as embedded within its societal context and is regarded as being shaped by, or as being the outcome of societal contextual forces (geographic, demographic, social, economic, cultural, political, and religious). Second, not only is the shaping influence of the societal context on education in the focus of study but also the other way around: the societal outcomes of education, that is, the effect of education on for example the economy (e.g., the effect of education on the incomes of people), or on the political system (e.g., the effect of education on entrenching democratic values) (Wolhuter, 2020). Third, Comparative Education scholarship does terminate with studying one education system in its societal context in silos. Different education systems, as shaped by their societal contexts, are compared and that is the comparative perspective.

Precipitated by trends in both the worlds of scholarship and in education, there recently developed a contention that the name of the field should change to Comparative and International Education. While the term International Education has a long history and has taken on many meanings, here International Education is used as described by Phillips and Schweisfurth (2014, p. 60), namely that International Education refers to scholarship studying education through a lens bringing an international perspective. With the scholarly field of Comparative Education then evolving into Comparative and International Education, the idea is that single/limited area studies and comparisons then eventually feed the all-encompassing, global study of the international education project.

While this occupation with context (as shaping force) of education system has been a perennial feature of Comparative Education, the conceptualization of *context* has evolved during the course of the historical development of the field, reflecting changes in both the world (the subject of study) and in the scholarly field itself, becoming ever more refined and sophisticated.

TESTING NEW FRONTIERS: EVOLUTION AND REFINEMENT OF THE *CONTEXT* CONCEPTUAL TOOL

Marc-Antoine Jullien (1175–1848) has created the term *Comparative Education*. Together with Isaac Kandel (1881–1965), he shares the title of “The father of Comparative Education” and 1817, the year of the publication of his book *Esquisses and Vues Préliminaires d'un Ouvrage sur l'Éducation Comparée*, is taken as year one of a science or scholarly field of Comparative Education. What inspired Jullien was the socio-political turmoil he saw in the world, in his day and age of Europe since the French Revolution to 1848, and he saw in education, international cooperation in education, and a field of scholarship of Comparative Education an instrument of ameliorative potential in sanitizing the world from such turmoil (see [Wolhuter, 2017](#)). Hence, in the conceptualization of a rationale for Comparative Education, *context* is visible, albeit not being spelled out explicitly or profoundly analyzed, neither in structure nor in terms of education–context interrelationships.

After 1900, and reaching its zenith in the decades after 1930, Comparative Education entered the “factors and forces” stage inaugurated by Sir Michael Sadler’s (1865–1943) 1900 Guilford Lecture, societal context became very salient in conceptualizing the subject of study of the field, although now in the opposite direction than implied in Jullien’s scheme: no longer the societal effect or outcomes of education was the focus, but societal context as antecedent or shaping force of national education systems became the focus of attention. Taking it further than Isaac Kandel’s (1881–1965) rather vague-diffuse premise that “national character” shapes the kind of national education system of a nation, put forward in his landmark 1933 volume, *Studies in Comparative Education* ([Kandel, 1933](#)), various scholars in the field, such as Nicholas Hans, Friedrich Schneider, Arthur Moehlman, Vernon Mallinson, Ph Idenburg devised their elaborate schema as to the set of societal contextual forces shaping national education systems. German comparativist Friedrich Schneider (1881–1969), for example, in his volume *Triebkräfte der Pädagogik der Völker: Eine Einführung in die Vergleichende Erziehungswissenschaft* (1947), distinguished between the following sets of factors giving rise to (the particular nature) of (national) education systems: national character, geographical environment, economy, culture, religion, social differentiation, influence of other countries, and endogenous factors. University of Leiden, Netherlands, comparativist Phil Idenburg (1921–1991) distinguished between the following shaping forces of national education system: geography, demography, science and technological development, social system, economy, politics and religion, and life- and world-philosophy ([Idenburg, 1975](#)). While these schemes vary, more or less the biggest common denominator is the following set of factors: geography, demography, technological development, social system, economy, politics, and religion and life and world-philosophy (see [Wolhuter et al., 2018](#)). This classification will also be used as ordering rubric in the next and ensuing chapters in this volume.

In the 1960s, in what [Harold Noah and Max Eckstein \(1969\)](#) calls the “social science phase” another Copernican revolution took place in the field. Once again,

what interest the leading exponents in the field was not the societal context as a shaping force of national education systems, but the societal outcomes of education. Noah and Eckshtein (1969) probably best articulate this mission comparativists set for themselves when they state that the core occupation of comparativists is to test society–education interrelationships. An example of this strand of Comparative Education at this time is the publication of Harbison and Myers (1964), in which they calculated the relation between education development and economic strength in 75 countries, so as to demonstrate the effect of education on economic growth.

In these times, from the mid-twentieth century but especially from the 1960s, a ceilingless belief in the power of education to effect any kind of desired social change, such as education to stimulate economic growth, education to eradicate poverty, education to reduce the number of road accidents, or education to combat drug abuse. This belief in the societal elevating power of education also gained a grip in the field of Comparative Education. The fashionable paradigm in Comparative Education shifted from the “factors and forces” mold to structural-functionalism and its derivative modernization, theoretical frameworks which dominated the social science phase. Structural-functionalism views society as consisting of a set of interconnected systems (economic system, social system, political system, etc.) and interconnected institutions. Change in one system will result in all other, connected systems, moreover, change can be planned in one system to bring about desired change in other systems. Hence, education can be used to effect change in other systems, for example, education can be used to effect economic growth (economic system). When looking at the emerging nations of the Third World, the paradigm of Modernization contended that education is the main instrument to be used to bring about development and modernization in these nations.

As from the 1970s, more so since the late 1980s, as Comparative Education its two ultimate phases what Rolland Paulston (1997) calls the phases of heterodoxy and heterogeneity, the field was characterized by its *avant garde* scholars introducing an ever increasing variety of paradigms. Each (or at least the majority) of these paradigms zooms in on, and explicates, a particular facet of the education–context interrelationships, at one or more level of education (for now the national state is no longer conceived as constituting the perimeter of the scope of interest of comparativists, Comparative Education is now seen to focus on a whole hierarchy of geographical levels, see Bray & Thomas, 1995; Wolhuter, 2008). For example, the paradigm of Human Capital focuses on the effect of education on economic productivity. The paradigm of critical ethnography focuses on how power relations in the (political, economic, and social) context shapes the (lived) experience of learners and teachers.

Hence, as developed hitherto, the concept of societal *context* has always been at center-stage in the activity of comparativists. This concept has, along with the field and the development in the world, evolved, from an unnamed diffused world in the time of Jullien, to being subjected to analysis as to what this context comprise of in the “factors and forces” phase, to being subjected to rigorous, exact testing, in the social science phase, to lately when a plethora of paradigms each

zooms in on one or more specific facets of this context in its interrelationship with education. Yet it is now difficult to point out a number of concerns in scholars in the field and their handling of this context, in the present, unfolding world. It is to these problematic facets that this chapter will not turn to.

DEFICIENCIES IN COMPARATIVE EDUCATION SCHOLARS' CONCERN WITH CONTEXT

Criticism about comparativists current concern with context revolves around paradigm fix, the fragmentation of field, rear mirror traditions, and inertia and nominalism characterizing the field.

That the proliferation of paradigms constitute the signature feature of the field at the current day and age has been criticized repeatedly by scholars in the field, beginning with George Psacharopoulos' 1990 CIES (Comparative and International Education Society) presidential address (Psacharopoulos, 1990). First, the feeling is that a fixation on paradigms distracts attention from the actual supposed subject of study, namely education, and, second, that in a post-modern mode of "anything goes," any paradigm acceptable, the field has lost its moral compass (see Wolhuter, 2015). Related to this is the fact that the proliferation of, and celebration of a diversity of paradigms, makes for the fragmentation of the field. In his publication dealing with a parallel predicament in the field of Organizational Theory, Lex Donaldson (1995) explains how such a state of affairs can promote the disintegration of a field and of a scholarly community, with an absence of standard concepts, information overload to students of the field, and a dilution of replication which is possible. Furthermore, the scholarship body-collective in a particular field is a zero-sum game, and the multiplication of paradigms distracts attention from the actual subject of study.

Then scholars in the field show an unbalanced orientation toward the past. In the factors and forces stage, this orientation is strongly visible in the landmark volume of Harvard scholar Robert Ulich (1961) *The education of nations: A study in historical perspective*, although in most of the schema of the factors and factors protagonists, the historical as shaping factor of education systems is, in one way or another, present. In the pages of journals in the field articles, a historical slant (in explaining the present education make-up) can be found, for example, such as Dana Holland's (2010) article on higher education in Malawi. While the present also received its fair attention from scholars in the field, it would be very hard to find negotiation with the approaching future to the same extent as the past. This despite that ever since the publication of Alvin Toffler's *Future shock* (Toffler, 1970), the thesis of that book, that the key feature of the modern age is one of change, and accelerating change at that (see also Rosa, 2005).

There is also the problem of inertia in the field. Despite the spelling out by scholars in the field that the current age is one of diminishing power and importance of the nation-state (see Wolhuter, 2017), and that in the vacuum created by the fading nation-state, the locus of power is shifting in two opposite directions, upward toward international/global and supra-national structures, and

downward toward sub-national, regional, and local structures right down to the empowerment of the individual; and despite theoreticians mapping out a whole hierarchy of geographical levels for comparative education studies to take place (in this regard the Bray and Thomas cube (Bray & Thomas, 1995) is the trail-blazing publication in this regard), research in the field stays tenaciously stuck at the level of the nation-state (see Wolhuter, 2008).

Finally the factors and forces' stage emphasis on the particularity of education systems has placed the field on a trajectory where extreme nominalism has characterized the field. One of the driving forces of science, to find unity in an apparently large diversity, has been subdued in Comparative Education. Taxonomy, which typically occupies a pivotal position and key organizing framework in fields of scholarship, has bypassed Comparative Education. The first elaborate taxonomy of education in Comparative Education was published only in 1997 (Wolhuter, 1997), and even after that never took center stage in the field.

To summarize, while the notion of the context has always been present in the field and is a threshold concept and very important conceptual tool, and while the term context has been explicated and refined, attention to the field has been distracted by a fascination by paradigms and a fixation on the nation state as unit of analysis, and an overbalanced attention to the past to the neglect of the future and the extreme nominalism characterizing the field also mean that the intellectual grip on this context is deficient. In the meantime, seismic changes are taking place in the world (i.e., the context). These changes can be subsumed under the collective name of globalization.

THE UNPRECEDENTED SEISMIC SHIFT IN CONTEXT IN THE EARLY TWENTY-FIRST CENTURY: GLOBALIZATION

There is no universally accepted conceptualization of globalization (Pan, 2013, p. 18). Globalization has many facets, and a large variety of trends in the contemporary world could be related to globalization (as will be explained in the next chapter). The Peterson Institute for International Economics (2020) describes globalization as “the growing interdependence of the world’s economies, cultures, and populations, brought about by cross-border trade in goods and services, technology, and flows of investment, people, and information.” Held (1991, p. 9) describes globalization as “the intensification of worldwide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa.” Oxford Globalisation Professor Ian Golding and Mike Mariathan (2014) coined the term “the butterfly defect” to describe how in the new world of hyper global connectivity, systemic risks – from cyberattacks and pandemics to financial crises and climate change – need to be managed.

While traces of globalization can be traced back at least till the time of explorations and discoveries in the fifteenth century, and Magellan’s circumnavigation of the earth in 1519 (and historians of globalization has reconstructed the historical evolution of globalization identifying globalization 1.0, globalization 2.0, globalization 3.0, and globalization 4.0 as successive waves of globalization), it

was after the fall of the Berlin Wall and the dissolution of the Cold War in 1990, when the disappearance of the Iron Curtain and the possibilities of the information, communication, and transport technology revolution set in motion a turbo-charged globalization.

This compelling force of globalization has also attracted the attention of the Education research community, the Comparative Education scholarly circle in particular, although, as will be argued in this book, their attention was thus far somewhat lopsided. The journal *Compare* for example, ran a special issue in 2000 (volume 40 number 1) on the theme “Education in the context of Globalisation: Shifting identities, transforming cultures,” while the title of Noel [Mc Ginn’s \(1996\)](#) Comparative and International Education Society 1996 Presidential Address was “Education, democratization, and globalization: A challenge for comparative education.” The journal *Globalisation, Societies and Education* commenced in 2002, and volumes such as [F. Rizvi and B. Lingard \(2010\)](#) *Globalizing Education Policy* and [Karen Mundy et al.’s \(Eds.\) \(2016\)](#) *Handbook of Global Education Policy* have begun to appear. It has been stated above that calls have been made for the field of Comparative Education to be superseded by Comparative and International Education; [David Phillips and Michelle Schweisfurth \(2014\)](#) understand International Education as studying education through a lens bringing an international perspective.

The responses of the Comparative and International Education scholarly community to the force of globalization could be arranged along two dimensions ([Wolhuter, 2019](#)). The first dimension represents a range of value-judgments of globalization, similar to those found in other social sciences and in the public discourse. University of Ghent (Belgium) comparativist Roger [Standaerdt \(2008\)](#) distinguishes between three stances: anti-globalization, pro-globalization, and other-globalization. The first then represents a negative judgment on globalization (and its effect on education), the second judge globalization to be a benevolent force, while protagonists of the third see in globalization *per se* potential advantages, but plead for a different kind of globalization than that currently manifesting itself in the world ([Wolhuter, 2019](#)). In Comparative Education literature, the anti-globalization stance seems to dominate (cf. [Wolhuter, 2008](#), pp. 334–335).

The 1996 CIES Presidential Address of Noel [Mc Ginn \(1996\)](#) cited above is an example of a publication from the anti-globalization camp. Here globalization is seen as nothing but a tool of the neo-liberal economic revolution, now exporting the corporate rule of industry and business (multinational companies), that is, of the possessing class, to a world-scale, resulting in growing inequality on a global level, the shrinking of democratic space, undermining the autonomy of civil society, and severing the links between community and education institutions.

Examples of scholars celebrating the trend of globalization include [Lidewey Van der Sluis and Sylvia van de Bunt-Kokhuis \(Eds.\) \(2009\)](#) on the development and the circulation of global talent, [Wildawsky \(2010\)](#) on how globalization makes possible the development of transnational higher education, and [Mark Bray’s \(2003\)](#) article in which he identifies new opportunities, roles, and vistas opened by globalization for the scholarly field of Comparative and International Education.