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Methodology and Focus in Comparative Education

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The preceding chapters in this book have raised many issues from a range of perspectives. This final pair of chapters summarises and elaborates on some of the lessons that may be learned from the analyses. The present chapter comments on the contents of the earlier chapters within the framework of existing comparative education literature, particularly addressing methodological features. It begins by considering the widely-accepted purposes for undertaking comparative study of education. It then turns to dominant foci in the field, and finally to the approaches and tools commonly used by comparative educationists. The next chapter, following the subtitle of the whole book, identifies conceptual lessons concerning continuity and change in education.

The Purposes of Comparative Study of Education

The purposes of comparative study of education may be wide and varied. Much depends on who is doing the comparing, and under what circumstances. For example:

- parents commonly compare schools and systems of education in search of the institutions which will serve their children's needs most effectively;
- policy makers in individual countries examine education systems in other countries in order to discern ways to achieve political, social and economic objectives;
- international agencies compare patterns in different countries in order to improve the advice that they give to national governments and others;
- practitioners, including school principals and teachers, may make comparisons in order to improve the running of their institutions; and
- academics commonly undertake comparison in order to develop theoretical models which promote understanding of the forces which shape teaching and learning in different settings.

This particular book is (co-)published by a research centre within a university. The book does not aim directly to help parents seeking to find the best schools for their children, since that would have required a very different format and set of contents. Likewise, direct assistance to international agencies, policy makers and practitioners is not a primary goal, though the editors and authors certainly hope that people in such groups will read the book and gain insights which will assist their work. Rather, the book

has been conceived principally as an academic work which aims to deepen understanding of the forces that shape education in different societies. The book chiefly focuses on the education systems and institutions in two territories on the south coast of China; but the work also aims at wider conceptual understanding.

In this context, it is useful to note some of the purposes of comparative education identified by scholars at earlier points in history. A good place to start is with one of the great-grandfathers of the field of comparative education, Sir Michael Sadler. Writing in 1900 (reprinted 1964, p.310), Sadler suggested that:

> The practical value of studying, in a right spirit and with scholarly accuracy, the working of foreign systems of education is that it will result in our being better fitted to study and understand our own.

The emphasis in this quotation is of an individual looking outwards, identifying another society and then comparing patterns with those in that individual's own society. In the case of the present book, it would describe a resident of Hong Kong seeking to learn more about Hong Kong through comparison with Macao; and it would describe a resident of Macao seeking to learn more about Macao through comparison with Hong Kong. Sadler suggested (p.312) that the comparison might encourage appreciation of domestic education systems as well as heightening awareness of shortcomings:

> If we study foreign systems of education thoroughly and sympathetically – and sympathy and thoroughness are both necessary for the task – I believe that the result on our minds will be to make us prize, as we have never prized before, the good things which we have at home, and also to make us realise how many things there are in our [own education systems] which need prompt and searching change.

However, while the editors and authors of this book certainly hope that the work will help residents of Hong Kong and Macao to value and critique their own education systems, the editors and authors also hope that it will prove instructive to readers elsewhere. These readers might include people who have never visited, and indeed do not expect to visit, either Hong Kong or Macao. Such an aspiration emphasises a higher goal of conceptual understanding and theoretical construction.

In aiming for such a goal, again the book has many antecedents within the field. Isaac Kandel, for example, was a key figure in the generation which followed Sadler's. Kandel's 1933 book (p.xix) listed a set of problems which, he suggested, raised universal questions. Kandel then pointed out that:

> The chief value of a comparative approach to such problems lies in an analysis of the causes which have produced them, in a comparison of the differences between the various systems and the reasons underlying them, and, finally, in a study of the solutions attempted.

The tone of such a statement is more closely allied to theoretical goals; and Kandel's book to some extent established a tradition into which the present book fits.

Nearly half a century later, however, Farrell (1979, p.4) justifiably pointed out weaknesses in the quality of theorising in the field. He observed that:

> There is a lack of cumulation in our findings; we have many interesting bits and

> pieces of information, but they seldom seem to relate to one another. We have little in the way of useful and concise theory.

This situation partly arose from the fact that comparative education is a field in which scholars of many ideological persuasions converge. Since Farrell wrote those words, moreover, the field's principal academic journals have hosted further controversy and discord. Positivists have clashed with post-modernists, structural-functionalists have disputed with conflict theorists, and so on (Epstein 1986; Psacharopoulos 1990; Paulston 1997, 1999; Bray 2003b; Crossley & Watson 2003).

Nevertheless, the goal of contributing to higher-level conceptual understanding remains not only legitimate in the scholarly arena but arguably the principal overall justification for undertaking academic studies. Such theorising, moreover, should not be seen as merely a form of self-gratification for small groups of thinkers whose work is distant from realities. As Farrell also pointed out (1979, p.4), it is through development of good theory that academics can be of greatest use to policy makers and practitioners:

> [We] will not find something useful to say simply by directing our efforts to studies of popular policy issues of the day – by being trendy. We will have something useful to say only when our observations regarding any particular policy problem are rooted in a more general understanding of how educational systems work, which is in turn based upon cumulated discoveries organized into and by theory.

Such remarks are pertinent to the present book as much as to others in the field.

Focus in Comparative Studies of Education

Locational Comparisons

Paralleling the diversity of ideological perspectives in the field of comparative education is a diversity in the foci of comparison. The field of comparative education is principally conceived in terms of locational comparisons, i.e. of phenomena in different places. Temporal comparisons may also be important, and are considered below, but historical and futuristic studies focusing on single locations are less likely to appear in the pages of comparative education journals.

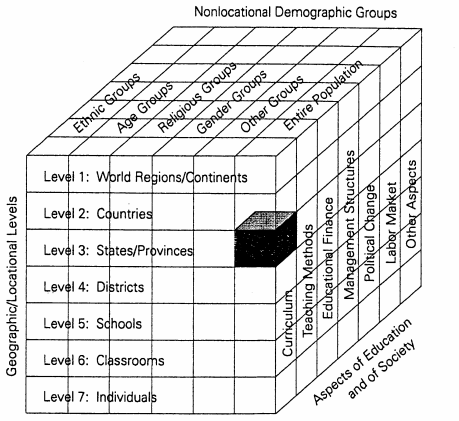
Even within the category of locational comparisons, survey of the articles in the field's major journals would display a vast array of studies. The array would include diversity in the themes and in the countries, regions, levels of education, and types of education chosen for analysis. Within this array, however, two emphases have been dominant. First has been a stress on comparisons in which the main units of analysis are nations or countries (commonly treating these two words as synonyms, and ignoring the differences in meaning which are important to political scientists [e.g. Robertson 1993, p.331]). Second, a major focus has been on systems of education, many of which are described, rightly or wrongly, as national systems. Conceptually, of course, it is possible, and in many circumstances very desirable, to compare classrooms, schools and other units both between and within countries; but a considerable number of major works which have helped to define the field of comparative education have explicitly focused cross-nationally on systems of education. Sadler's 1900 presentation was in this category, as was Kandel's 1933 book. Subsequent works, spread over the decades,

include Cramer & Browne (1956), Bielas (1973), Ignas & Corsini (1981), and Postlethwaite (1988).

To some extent, the present book fits in this tradition. The chapter by Adamson & Li on primary and secondary education sets part of the scene by describing what is widely called *the* Hong Kong education system, though Adamson & Li also observe the existence of schools and even of systems in Hong Kong which lie outside the mainstream. Macao, by contrast, has not had a dominant entity which can be described as *the* Macao education system. Instead it has had a plurality of systems – a fact which has been the focus of considerable and important comment in the present book.

In a strict sense, however, the main focus in this book is not on cross-national comparisons. Hong Kong and Macao cannot be described as nations, and not even as countries. Prior to the 1997 and 1999 changes of sovereignty they were administered as colonies, albeit with substantial autonomy from the United Kingdom and Portugal; and since the change of sovereignty they have been Special Administrative Regions (SARs) of the People's Republic of China (PRC). As such, the book may be seen as helping to redress an imbalance in the field of comparative education by focusing on a pair of units which, particularly after 1997 (in the case of Hong Kong) and 1999 (in the case of Macao) may be called in *tra* national instead of in *ter* national.

Figure 14.1: A Framework for Comparative Education Analyses



Source: Bray & Thomas (1995), p.475.

This observation may usefully be considered in conjunction with a comment about the value of multilevel analyses. Figure 14.1 reproduces a model for comparative analyses presented by Bray & Thomas (1995). The article from which it is taken pointed out that too many studies neglect discussion of the ways in which patterns at lower levels in education systems are shaped by patterns at higher levels, and vice versa. The article noted that the goals and resources available for some comparative studies necessarily limit their scope, but suggested that such studies should at least recognise both the mutual influences of other levels and the boundaries in their foci.

Along these lines, Figure 14.1 is helpful for showing what the present book has and has not covered. Within the figure, the smaller black cube represents a comparative study of curriculum in two or more states/provinces of a single country. That smaller cube would also be shaded if the contents of the present book were mapped against the large cube. In this case the vocabulary would refer to colonies/SARs rather than to states/provinces, but the basic idea is equivalent. This particular book has included a chapter on curriculum as a whole (by Lo), and separate chapters on civic and political education (by Tse), secondary school history (by Tan) and secondary school mathematics (by Tang). This list on the one hand shows how the book has gone into detail, but on the other hand indicates the extent to which further study is both possible and desirable. Many more subjects and cross-curricular domains remain to be analysed in the same way; and history and mathematics can instructively be compared at other levels in addition to the secondary level.

Other parts of the cube which would be shaded if the contents of the present book were mapped against Figure 14.1 would include levels of education as a whole. This would be done under age groups (or, if that is considered too rigid on the grounds e.g. that some 12-year olds may be in primary school while others are in secondary, under 'other groups') in the nonlocational demographic dimension of the cube. Concerning levels of education, the present book has compared pre-primary education in Hong Kong and Macao, and has given similar treatment to primary, secondary and higher education. Teacher education is not so much a level as a type of education. However, the book has omitted specific coverage of some other types of education, such as schooling for the blind, deaf and mentally handicapped. This again emphasises that although the present book is the product of a substantial amount of work, much further exploration remains to be done.

Concerning other levels of the cube, several chapters in the present book make explicit comparisons of institutions – particularly the chapters by Tan on secondary school history curricula, and by Yung and by Hui & Poon on higher education. Comparisons of classrooms and of individuals are mostly implicit rather than explicit. A similar observation applies to higher levels in the cube: several chapters refer to other countries and to world regions, but it has not been the goal of the authors to make systematic multilevel comparisons throughout each chapter. This certainly does not devalue the nature of the research; but the discussion does help to show the boundaries of the present book as well as its focus.

Temporal Comparisons

Turning to temporal comparisons, all chapters in this book place comments on contemporary events within the context of historical antecedents. Leung's chapter on church and state, for example, goes back to the 16th century with reference to Macao. Tang's chapter on mathematics curricula also has a strong historical element, albeit mainly confined to the 20th century. These and other chapters therefore contain comparisons over time as well as over place; and while temporal comparisons do not so readily find an accepted niche within the field of comparative education, they are considered legitimate and important by at least some major figures in the field (e.g. Cowen 1998, p.61; Thomas 1998, p.9).

Concerning the value of historical research in comparative education, Sweeting

(2001, p.226) pointed out that "efforts to stretch comparisons across places, with little or no attention paid to time, are likely to create a thin, flat, quite possibly superficial outcome". In contrast, he added, efforts to enable comparisons to encompass time in addition to place are likely to enhance the profundity of analysis. The editors and authors certainly hope that this observation applies to the present study. All projects must of course seek balances within the framework of their objectives. By restricting its primary spatial focus to two locations, the present book sacrifices the insights that would come from systematic comparison of more locations. However, because the primary spatial focus was restricted, greater depth has become possible through temporal comparison.

A further benefit from incorporating historical analysis is the possibility of clearer understanding of the actors and processes in education systems. As pointed out by Sweeting (2001, p.228):

> There is an understandable tendency of writers on comparative education to concentrate on product documents such as White Papers, commission reports, and digests of statistics rather than the type of process documents that illuminate past decision-making (and fascinate historians). This leads, at times, to a failure to distinguish between the officially designated agents of policy-making and the actual ones.

Sweeting added that the superficiality necessitated when comparative education studies involve many locations may lead analysts to make false assumptions about sequence in policy making and implementation. Using the example of language policy for Hong Kong schools, Sweeting shows (p.6) that policy formulation does not necessarily precede implementation. Hong Kong has a long and tortuous history in the debate about appropriate policies for the medium of instruction, particularly at the secondary level. Only through historical comparisons is it possible to ensure that simplistic analyses are avoided. As observed elsewhere by Sweeting (1997, p.36):

> It could have helped the policy makers and advisers in 1973 and 1974, for example, as they debated whether to make Chinese the normal language of instruction in the early years of secondary education, if they had remembered to check what had happened in 1946 when language circulars proposing precisely this were withdrawn by the Education Department.... More recently, enthusiastic proponents of 'bridging programmes' to help students switch from one medium of instruction to the other would have benefited if they had examined both the strengths and weaknesses of the Special Classes Centre at Clementi Middle School in the years 1956-1963.

Readers will judge for themselves how well the chapters in this book have drawn insights from their historical frameworks and have avoided the superficiality which would have posed a stronger threat had the book taken more locations as its primary focus; but the methodological point remains that the restriction in the number of locations has permitted greater depth in historical analysis. This has permitted comparisons over time, which has been a key element enshrined even in the subtitle of the book about continuity and change. Temporal comparisons have also permitted authors to analyse processes of change, not relying on simplistic statements about products.

Changing Fashions and Opportunities

Discussion about focus in comparative education should include commentary about changing fashions in the types of topics which dominate the literature during particular decades. Kelly (1992, p.18) observed that the field "has always been influenced by contemporary events". At the same time, comparative education, like other fields, has some topics which remain strong foci for research and debate throughout the decades.

The contents of the present book were influenced by contemporary events in several ways. Most striking, particularly at the time of preparation of the first edition of the book, was the heightened sense of identity in both Hong Kong and Macao because of their changes of sovereignty. Hong Kong's transition attracted huge international media attention, and created considerable self-consciousness within the territory. Macao's transition attracted less international attention, but was obviously of major significance to the residents of Macao and to some extent also more widely. In this sense, the book fits Kelly's description as a product stimulated by a pair of contemporary events.

The book also results in several important ways from opportunity. Prior to the publication of the first edition, no previous book of this type had been produced. This was not only because of the absence of a sharp stimulus such as the change of sovereignty; it also resulted from maturing expertise for work of this kind within the two locations. Partly as a result of the expansion of higher education described in the chapters by Yung, Ma and Hui & Poon, by the mid-1990s both Macao and Hong Kong had local research capacity of a scale and quality unprecedented in their histories.

This expansion of research capacity was especially obvious in Macao. Between the closure of St. Paul's University College in 1762 and the opening of the University of East Asia (UEA) in 1981, Macao had no local institution of tertiary education. The operation of the UEA, which in 1991 was renamed the University of Macau (UM), created a body of scholars who had a mandate to undertake research as well as to teach, and who had a strong reason to focus their research on the territory in which they lived. Before 1981, very little research was conducted in or on Macao. Its subsequent blossoming was due in no small measure to the establishment and growth of the UEA/UM. It is no coincidence that at some point in their careers eight of the 17 contributors have been employees of the University of Macau.

However, the pattern has another instructive dimension: seven of these eight authors were residents of Hong Kong before moving to Macao. In part because Macao had not had a university for centuries, in the early years of the existence of the UEA/UM Macao was unable from internal sources to provide even the majority of people needed to staff the institution. Hong Kong was an obvious ground for recruitment, since it had a much larger pool of suitable personnel, was close at hand, and had cultural and political affinities. The result for the present book was the formation of a group of people who already knew a great deal about education in Hong Kong and who subsequently learned a great deal about education in Macao. These people were therefore excellently placed to contribute to a comparative study of this sort.

A question which readers might next have in mind concerns the other authors in this book who have never taught at the University of Macau. One of them was born in Macao but then came to Hong Kong for much of his education and subsequent employment. A determining factor in his personal history was that Hong Kong had a

stronger economy which attracted many migrants and their families; but the fact that he still had many relatives in Macao helped him to retain a strong interest in the territory. Others were born in Hong Kong but were drawn to undertake comparison by academic fascination with a neighbouring society which was both so similar and so different.

An additional factor in Hong Kong, which to some extent paralleled patterns in Macao but had a different emphasis, arose from the scale and nature of tertiary education. Hong Kong's first university, the University of Hong Kong, was founded in 1911 and has a much longer history than the UEA/UM. As recounted by Yung and by Ma, however, the 1990s brought considerable tertiary expansion. The higher education sector at this time was well resourced, but from the middle of the decade academics were placed under considerable pressure to produce evidence of productivity in research. For all disciplines, this combination of circumstances provided both the capacity and a strong incentive to undertake research.

Within this climate, comparative research has been a particular beneficiary. To the fact that some contributors were born in Hong Kong but worked in Macao, or vice versa, should be added that the majority of contributors gained at least part of their postgraduate training in neither place. Travel to other countries and other cultures for research training greatly promoted inclinations to undertake comparative studies. The growing prosperity of both Hong Kong and Macao were important factors in this, for economic strength provided both finance for people to go abroad for training and employment opportunities on their return. The governments of both Hong Kong and Macao endeavoured to take every opportunity to enhance international links since they perceived such links to be part of the safeguard of autonomy in the post-colonial era.

Yet another dimension of this environment helps explain the circumstances of the three contributors to this book who were not born in Hong Kong or Macao, nor indeed in the region. Two of the three contributors were born in Europe, and had personal reasons for taking up employment in Hong Kong. The third was born in India, came first to Hong Kong as a child because her father was employed by a multinational company, and returned as an adult in part because she felt affinity with Hong Kong. The fact that these three individuals could take that path was made easier by Hong Kong's economic strength and therefore employment opportunities. The significance for the field of comparative education was that the individuals brought perspectives not only from their countries of origin but also from other places in which they had worked.

To summarise, this list of biographies has been presented not so much because of its intrinsic interest but to echo and elaborate on the observation by Kelly (1992, p.18) that the field of comparative education "has always been influenced by contemporary events". The contemporary events which led to this particular book included a confluence of stimulus and opportunity. Much of the stimulus lay in the change of sovereignty in the two places, while much of the opportunity lay in the existence of persons who had the skills and interest to undertake a study of this kind. In turn, the existence of these persons was partly the result of economic prosperity and a political desire for international connections. The Comparative Education Research Centre at the University of Hong Kong, which is the co-publisher of this book, was established in 1994 and to some extent is itself a product of this pattern of circumstances (Bray 2004b).

Allied to this, the influence of contemporary events is evident in one analytical theme which runs through the majority of chapters, namely the focus on colonial

transition and postcolonialism. Because Hong Kong and Macao had undergone changes of sovereignty in 1997 and 1999 respectively, it was natural for a book prepared at this point in history to make the transition and its consequences a major focus. In turn, focus on colonial transition naturally led to focus on colonialism itself, including the main era and even, for some authors, the beginning of colonial rule.

However, survey of literature on comparative education shows that colonialism is a topic of sustained interest in the field as a whole. A sampling of writings over the decades could include Murray (1929), Mayhew (1938), Furnivall (1943), Lewis (1954), Ashby (1966), Altbach & Kelly (1978), Watson (1982a), Arnove & Arnove (1997), and Steiner-Khamsi & Quist (2000). In this respect, the contents of this book contribute to an existing body of knowledge on a topic which remains of widespread concern in the academic world. It does so, moreover, in at least two distinctive ways. The first is that comparison of Hong Kong and Macao requires comparison of British and Portuguese colonial styles. While a considerable body of literature compares education in British and French colonies (e.g. Clignet & Foster 1964; Gifford & Weiskel 1971; Asiwaju 1975), little direct comparison has been made of education in British and Portuguese colonies. Watson's (1982b) 23-page bibliography contained no direct reference to any such work, and the only direct reference to comparison of British and Portuguese (plus Belgian and French) colonial styles in Kay & Nystrom's (1971) 19-page bibliography was a 1949 article by Lewis. Likewise, Altbach & Kelly's (1991) book omitted all mention of Portuguese colonialism. Comparison of colonial styles in Hong Kong and Macao therefore helps to reduce a longstanding neglect.

A second distinctive way in which this book contributes to the conceptual literature on this topic arises from distinctive features of the colonial transition in the two territories. Among these features were that:

- the transitions in Hong Kong and Macao were at the end of the 20th century rather than earlier, and thus took place in a very different global climate;
- the transitions took place over an extended time period;
- the transitions were not to independent sovereign statehood, but to reintegration with the country from which the colonies had previously been detached; and
- the colonies being handed over had far higher per capita incomes than had been the case in previous decolonisation exercises.

Because these features are distinctive to Hong Kong and Macao, as a pair they provide instructive contrasts to colonial transitions in other parts of the world and at earlier times in history (Bray 1994, 1997c).

However, colonial transition is of course not the only theme that runs through the majority of chapters. Another pair of themes deserves to be highlighted because it can again be related to both sustained interests and fashions in the comparative study of education. One partner in the pair, which has been the focus of sustained interest (see e.g. Reller & Morphet 1964; Lauglo & McLean 1985; Cummings & Riddell 1994; Mok 2003), concerns the control of education, including questions of centralisation or decentralisation and the role of churches and other non-government bodies at different levels of education systems. The more fashionable topic is privatisation in education – a topic which attracted particular attention during the 1980s, 1990s and initial decades of the present century (see e.g. Walford 1989; Jimenez & Lockheed 1995; Bray 1998c; Wang

2000; Belfield & Levin 2002).

Again, the book contributes perspectives which are important additions to the broader literature. Lo's chapter points out that in the domain of curriculum control, Hong Kong's mainstream education system is widely described as centralised. In Macao, by contrast, control of curriculum has been largely uncentralised (a word which is preferred to the term *de*centralised since the latter usually describes a situation which was previously centralised, whereas in Macao curriculum control was never centralised). During the 1990s, aspects of administration of Hong Kong schools were decentralised, with institutions being given stronger autonomy through the School Management Initiative and other schemes (K.C. Wong 1998). In other respects, however, control became more centralised. Perhaps the best example of this, explained in Koo's chapter, is the medium of instruction in secondary schools. Control also became more centralised in Macao, and in this respect the two societies not only began to resemble each other more, but also provided a useful counterpoint to the considerable literature which advocates decentralisation of educational administration (e.g. Winkler 1989; Fiske 1996; USAID 1997; World Bank 2003), often in a rather generalised way.

Likewise, analysis of both Hong Kong and Macao provides useful insights for debates about privatisation. Macao is one of the few places in the world in which the majority of schools have been left to operate on their own with almost no government support, interference or control. However, the resulting patterns have been far from the idealistic pictures of efficiency and quality painted by advocates of privatisation such as Chubb & Moe (1990) and Cowan (1990). Because of the problematic features of the situation, in Macao the 1990s brought processes of publicisation rather than privatisation, very much against the world trend. Patterns in Hong Kong were more complex, but they also included a measure of publicisation through the Direct Subsidy Scheme (Ip 1994; Bray 1995b).

Moreover, careful analysis of Hong Kong schools shows the danger of superficial judgements by authors who do not take the trouble to look beyond the surface. For example, James (1988, p.96) looked at Hong Kong statistics, found that only 8 per cent of primary and 28 per cent of secondary pupils were in schools operated by the government, and mistakenly assumed that all the rest were in private schools. Had she looked more closely, she would have found that although the aided schools are legally non-government bodies, almost all their funding comes from the government and they are subject to considerable government control. As such, the aided schools would be much more appropriately classified in the public than the private sector. Such remarks illustrate the danger of superficiality in large-scale comparative research, particularly when it requires data from diverse settings to fit simple categories, and emphasise the value of studies which can examine matters in depth.

Approaches and Tools in Comparative Study of Education

Watson (1996, p.381) has highlighted the plurality of methods in the field of comparative education:

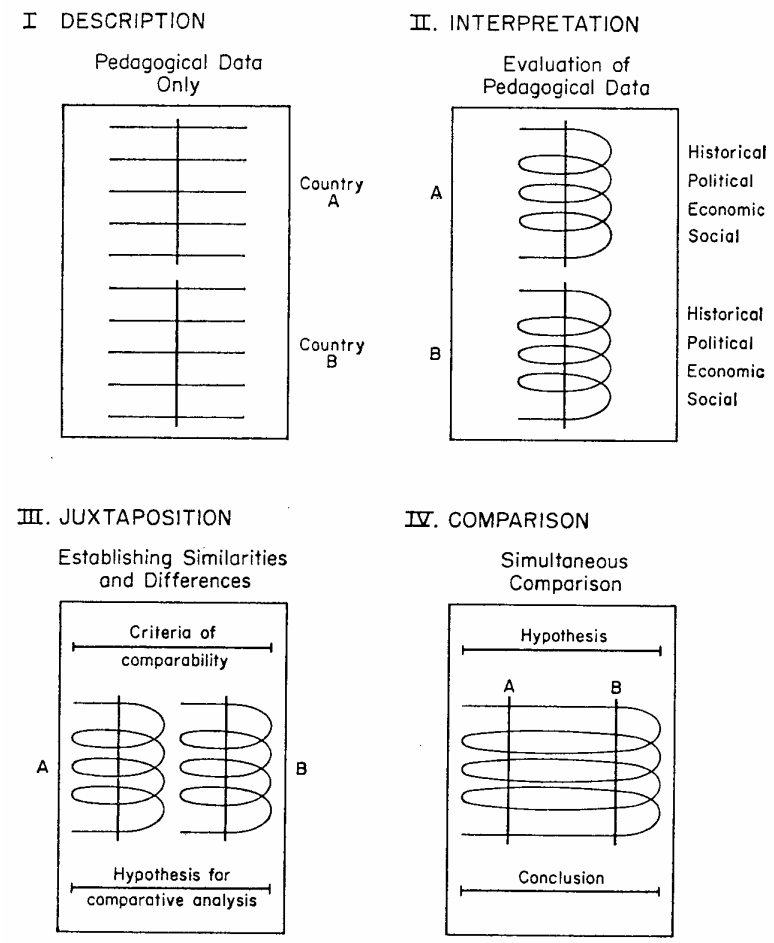
> Because comparative education is the product of many disciplines it cannot lay claim to any single conceptual or methodological tool that sets it apart from other

> areas of education or from the applied social sciences. It must be stressed, therefore, that there is *no* single scientific comparative research method in spite of the efforts of some scholars to argue that there is.

Just as the aims and foci of comparative studies of education may vary widely, so too may the methods. Comparative studies, like most others, may be primarily quantitative or primarily qualitative; and they may rely on questionnaires, on interviews, on documentary analysis, and on many other bases (Rust et al. 1999; Crossley & Watson 2003).

The present book nevertheless has features which place it in a sub-group within the field. The various chapters are mainly analytical accounts based on description of both policy and practice. As such, they are very different from exploratory research which seeks to generate hypotheses, or evaluative research which seeks to test hypotheses. They are also very different from the carefully-constructed comparative studies of the International Association for the Evaluation of Educational Achievement (IEA), in which specific school subjects have been investigated on a cross-national basis through carefully designed questionnaires administered to equally carefully selected samples of schools and students (Postlethwaite 1999).

Figure 14.2: Bereday's Model for Undertaking Comparative Studies



Source: Bereday (1964), p.28.

One strength of the present book, as mentioned in the Introduction, is that each chapter focuses on patterns in both Hong Kong and Macao, and undertakes explicit comparison. In this respect the book differs from many others in the field of comparative education. Some books (e.g. Mukherjee 1964; Sullivan 1997) place country chapters in sequence, and primarily present comparisons at the beginning and/or end rather than in each chapter. Other books which purport to be comparative (e.g. Fafunwa & Aisiku 1982; Mazurek & Winzer 1994) barely even do that; instead they are little more than collections of single-country studies bound together, and leave it to readers to make the comparisons. The present work, it may be suggested, is in this respect more actively comparative.

In the process, whether consciously or unconsciously, almost all contributors to the present book have followed an approach allied to that advocated by Bereday (1964).

Figure 14.2 reproduces Bereday's recommended four steps for undertaking comparative studies of education in two countries. The first step in the model is description of pedagogical data for two countries separately. This is followed by evaluation within historical, political, economic and social contexts. The third step requires juxtaposition according to criteria for comparability and hypotheses for comparative analysis; and the final step requires simultaneous comparison according to the hypothesis to reach a conclusion.

Of course, not all authors in this book followed these steps in precisely that sequence. Indeed, as noted by Jones (1971, pp.89-92), Trethewey (1979, pp.75-77) and Watson (1996, p.371), that would be very difficult to do. Even at the first stage, in the words of Jones (1971, p.89), "the complete isolation of pedagogical facts is extraordinarily difficult, as rarely do they have meaning without the help of explanation, using other disciplines". Further, it is doubtful whether any researcher should be recommended to follow Bereday's sequence rigidly, moving from one step to another without going back over earlier ground to make several iterations. However, the model remains useful several decades after it was first presented because it stresses the value of systematic and balanced enquiry. The model further emphasises the importance of viewing education phenomena within their broader contexts.

The Bereday model also helps to underline why Hong Kong and Macao are a worthwhile pair for comparison, namely that they have sufficient in common to make analysis of their differences meaningful. The commonalities, as noted in the Introduction, include the fact that they are both situated on the south coast of China, are both mainly populated by Cantonese-speaking Chinese, are both urban societies with economies based mainly on services and light industry and with insignificant agricultural sectors, have both been colonies of European powers, and since the end of the 20th century have both been returned to China and governed as Special Administrative Regions. Yet this book has shown that their education sectors have significant differences as well as similarities. This provides an excellent basis for meaningful comparison to identify the extent and the reasons for the differences and similarities, and to advance conceptual understanding through exploration of the forces at work and the relationships between those forces.

More detailed analysis of the approaches used by the various authors of this book again reveals both commonalities and variations. All the authors used documentary materials, which is a dominant characteristic of much comparative inquiry in education. These documentary materials included primary as well as secondary sources: many chapters refer to government reports and statistics, for example, and a few cite primary sources from archives or other sources. Several chapters also draw on interviews, and a few report data collected from questionnaires. In other words, the range of methods used to gather material for the comparison is broad. This matches the range that would be found in typical volumes of the major professional journals.

One further obstacle commonly encountered in comparative education is that of language. Translations are a poor substitute for direct communication, and, as observed by Halls (1990, p.63), "for comparative studies to thrive, the linguistic barrier remains the greatest to be overcome". Direct linguistic access to both secondary and primary sources permits researchers to identify important nuances, and to avoid some of the misconceptions which might arise from inadequate translation and linguistic cultural

bias. The present book has benefitted from the fact that almost all authors have knowledge of both English and Chinese, and that several also have a working knowledge of Portuguese. The authors who did not have fluency in Portuguese may have been slightly handicapped in access to certain materials and people in Macao. However, in recent years much official documentation in Macao has been translated into Chinese; and the number of potential informants who did not speak Chinese or English was very small. As a result, lack of fluency in Portuguese has been much less of a handicap than it would have been if conducting research in Brazil or Cape Verde, for example. For the present research, English and Chinese were by far the most important languages, and competence in both languages has given the authors much greater access than would have been possible for monolingual researchers.

A final methodological point concerns the scale of the societies. With its population of below half a million, Macao is among the smallest of the small. Hong Kong has a much larger population, but is still very small compared with such neighbours as mainland China, Indonesia, Philippines and Vietnam. From a research perspective, smallness of scale may create some problems but can also have substantial benefits (Bray & Packer 1993). One benefit is that 100 per cent samples can be achieved with small numbers. Tang's chapter on mathematics curriculum is partly based on his PhD thesis (K.C. Tang 1999), which surveyed all the secondary schools in Macao. Because Hong Kong is larger, most researchers have to take samples when investigating education there; but their samples are usually still substantially greater proportions of the total number of schools than would be possible for research on mainland China, for example. In the domain of higher education, as shown by Yung's chapter, even in Hong Kong it is easy to make explicit reference to every institution.

Smallness of scale may also permit identification of the personal factors which shape education systems. Leung's chapter on the church and state exemplifies this in its reference to individuals who have shaped both policy and practice in Hong Kong and Macao. Tan's chapter on history curricula identifies individuals who have founded particular schools and shaped curricula. Since this chapter uses schools as units of analysis, a similar approach could have been used in larger societies. However, the schools sampled still represented a much greater proportion of the total in each territory; and the fact remains that all chapters would have been qualitatively very different had they focused on China and India, for example, rather than on Hong Kong and Macao. Focus on larger units would require greater anonymity and preclude the degree of attention to internal variations that is possible in smaller units.

Conclusions

As an academic study, this book aims to contribute to conceptual understanding more than to specific recommendations for policy and practice. Along the lines proposed by Farrell (1979, p.4), however, the authors and editors hope that the book will still assist policy makers and practitioners by showing some of the ways that educational processes interact with and result from economic, social, political and other forces.

Returning to Sadler's remarks quoted above, one of the key roles of comparative education is to help individuals to understand more fully their own societies. Margaret

Mead, the anthropologist, is reported once to have said (approximately): "If a fish were to become an anthropologist, the last thing it would discover would be water" (Spindler & Spindler 1982, p.24). Similar remarks might be made about research in comparative education. While the value of inside perspectives seems obvious, Mead's remark emphasises also the value of outside perspectives.

An alternative way to promote objective understanding of one's own society, however, is first to look outwards and then to look back. Comparative education, like other forms of comparative enquiry, should make "strange pattems familiar", i.e. should permit and encourage researchers and readers to become more familiar with the features of education systems and societies which are not well known to them. At the same time the reverse may also apply, i.e. that comparative education can make "familiar patterns strange", calling into question features of education systems and societies which had been taken for granted by insiders simply because they were so familiar with them (see Spindler & Spindler 1982, p.43; Choksi & Dyer 1997, p.271). The authors and editors of this book hope that on the one hand readers based in Hong Kong and Macao will learn about each other's society and patterns of education, but also that they will be encouraged to reflect on their own society and patterns of education. In the process, they may see features of their own society and education which had been overlooked and which perhaps deserve attention for encouragement or reform.

Within the book, historical features have been given considerable attention. As noted above, this is a strong tradition within the mainstream of comparative education. Writing in 1984, Noah (reprinted 1998, p.52) showed how temporal and locational comparisons can be combined in a fruitful way by observing that:

> Not only is the nation that forgets its history likely to repeat it, but the nation that forgets (or is blind to) the educational system of its contemporaries is risking either stagnation, or the perils of burdensomely expensive experimentation. Comparative understanding canhelp countries break with old ways of arranging the educational systems without the danger that they indulge in foolish daydreams that there are just one or two fairly simplistic things they need to do in order to set their schools aright.

Again, this shows the functional uses of comparative education to readers in particular societies, and in this case Hong Kong and Macao.

However, this chapter has also stressed that the book makes a contribution to broader literatures, and should interest readers who are not residents of either Hong Kong or Macao. The themes addressed in the book are certainly of interest to analysts in many other parts of the world; and even this methodological chapter may be of value to readers who seek to understand the processes by which comparative studies may be assembled in a range of contexts. Once again, this is the value of analytical works. Were the book to focus on recommendations to policy makers and practitioners in Hong Kong and Macao, it would have relevance to a limited audience and would rapidly become out of date. It seems likely that many of the themes on which the contributors to this book focus will have a relevance which is both enduring and which reaches considerably beyond the small part of the south coast of China with which the book is primarily concerned.