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Gita Steiner-Khamsi

The Case Study in Comparative Education from an International Historical Perspective

Christel Adick's list of contributions to the field of comparative education is long. I address in this Festschrift two signposts of her work that greatly resonate with comparative education research across the Atlantic: first, her focus on developing countries and second, her use of the single case study as a legitimate method of inquiry in comparative education. Different from many other scholars in continental Europe, she does not reduce comparative education to a method but rather repositions it as a perspective that enables us to examine modernization, globalization and the world systems at national and local levels. Her landmark study on education and colonialism in Togo (Adick, 1981) epitomizes the two features of her work: a single case study on educational development that is interpreted from a world system perspective.

I build in this chapter on two of my earlier publications (Steiner-Khamsi, 2006, 2009). In the first study, I investigate the impact of the Cold War on the academic field of comparative education in the United States and in Germany (Steiner-Khamsi, 2006). The second study deals with South-South cooperation and investigates the research question as to whether South-South cooperation is the way out of the dependency trap in international cooperation (Steiner-Khamsi, 2009).

The first study demonstrates the significance of the Cold War (in particular, the period 1957–1983) for introducing a paradigm shift in comparative education in the United States and in the German Democratic Republic (GDR). Both superpowers, the United States and USSR, generously funded research and teaching in language and area studies. As part of this cultural shift, the focus in comparative education shifted from the study of industrialized countries to research on developing countries. Moreover, the paradigm shift had important methodological repercussions: in line with the cultural turn in all the social sciences, greater attention was directed toward contextual comparison and case study research. In comparative education, the comparative education research communities of the United States and the GDR clearly experienced such a cultural, area studies, or development turn in the late 1950s and early 1960s. The academic fascination with developing countries reflects the race between the two superpowers over the patronage of „non-aligned" or „neutralist" countries in the Third World. I concluded my earlier study with the observation that U.S. comparative education underwent a development turn fifty years ago that radically transformed the field. The paradigm shift is reflected in the name change of our professional association in 1961: from Comparative Education Society (CES) to Compara-

tive and International Education Society (CIES).[1] For the past fifty years, comparative and international education in the United States has been known for producing many single case studies as well as studies on developing countries. However, the development turn is – with the exception of Adick's work – remarkably absent in German comparative education. In fact, there is a tendency in Germany to see Dritte Welt Pädagogik („Education in the Third World") as separate from comparative education rather than as an integral part.

The two different trajectories of the field lend themselves for reflection on the histories of comparative education: whereas comparative education in the United States expanded its focus in ways that also included single case studies in developing countries, the majority of scholars in comparative education in Germany and continental Europe – with the notable exception of Christel Adick and her associates – see the method of comparison (in fact, more narrowly: cross-national comparison) as the sine qua non condition of comparative research. For them, the method constitutes more than any other aspect the defining characteristics of comparative education. For this reason, Jürgen Schriewer and his former students from Humboldt University, for example, see themselves akin to scholars in other comparative social science disciplines such as comparative history, comparative sociology, or comparative political science. Adick's intellectual project is different: her interest and academic curiosity centers around area and development studies and, in general, educational research from an international comparative perspective. For example, in her textbook on comparative education, she devotes a chapter to „methodological nationalism and culturalism" to problematize the narrow focus on nation-states as units of analysis of traditional comparative education (Adick, 2008, chapter 6).[2] In this regard, Adick's work shares many similarities with the academic field of comparative and international education in the United States.

Historical contexts are relevant for understanding a scholar's preoccupation with particular themes, interpretive frameworks, and methods. Over the course of her illustrious academic career, Christel Adick experienced five historical periods that revamped the field of comparative education: the end of colonialism in the 1960s, the end of the Cold War in the 1980s, the first international agreement on educational reform priorities in developing countries in 1990 (Education for All), the rise of the World Bank and OECD as the global players in international educational development, and the spread of indicators, mid-term targets and benchmarks as tools for planning and accountability as reflected, among others, in the Paris Declaration on Aid Effectiveness of 2005.

Similar to many scholars in comparative and international education in the United States, Adick is closely involved in educational reforms that are supported by UNESCO and other international organizations. Inevitably, she must deal with critics who present international cooperation as a form of neo-colonialism that merely propels a transfer of educational reform models from the global North to the global South thereby perpetuating

1 The name change from of the U.S. professional association „Comparative Education Society" (CES) to „Comparative and International Education Society" (CIES) in 1969 confirmed the development turn which had taken place a decade earlier.

2 The chapter is entitled: *Der methodologische Nationalismus und Kulturalismus – das Ende der Vergleichenden Erziehungswissenschaft?* (Adick, 2008, p. 184ff.).

dependency and inequality. Non surprisingly, one of the periodically recurring themes in our field is therefore South-South cooperation and the demand for strengthening regional collaboration. The question thus becomes: is South-South cooperation the solution?

In my tribute to Adick's accomplishments, I reflect in the following on historical periods and debates that shaped the field of comparative education both in the United States and in Germany. Her work clearly reflects the development turn and, as a corollary, the interest in culture and contextual comparison. It is her merit to have systematically propelled case study methodology as a legitimate method of comparative education.

The Creation of the Third World

The wave of decolonization in Africa and other parts of the world was in large part complete by the end of the 1960s. The worries of the two superpowers were many: With whom do these newly emerging countries trade, with whom do they side in international conflicts, and for whom do they vote in the newly established multilateral organizations of the United Nations? It was a concern, but also a great opportunity to expand ones' influence in the so-called neutralist or non-aligned countries. It was a matter of greatest importance to the superpowers that the governments and people in these newly established nation-states, most of them impoverished from centuries of exploitation, make up their minds and choose their allies. After all, both communism and capitalism were global projects. According to Marxism-Leninism, socialism is merely an interim stage to the eventual achievement of communism. Communism, in turn, rests on the condition that every country in the world commit itself to the socialist path of development. Similarly, capitalism's survival depends, on the constant expansion of markets, continuously increasing the number of consumers, along with access to cheap labor and raw material enabling low production costs and greater individual profit.

Which were the target countries of the two superpowers? Where did they attempt to secure their influence? An analysis of funding patterns provides a glimpse into the political and strategic interests that the United States and former Soviet Union were pursuing during the Cold War. The so-called Greenbook, periodically compiled by USAID (United States Agency for International Development) for the U.S. Congress, is a valuable source for analyzing funding priorities and target countries of the U.S. government. The Greenbook presents figures on U.S. overseas loans and grants, listed under three categories: economic assistance (USAID grants and loans, Food for Peace, Peace Corps, etc.), military assistance (Military Assistance Program, International Military Education and Training Program, etc.), and other U.S. government loans (export-import bank loans, direct loans, etc.).[3] Judging from the statistical information (USAID, 2001), the Middle East has

3 It deserves special mention that the most recent, 2004 Greenbook on U.S. overseas loans and grants, compiled by USAID, blurs the line between military and economic assistance. Expenditures previously listed under military assistance are now listed under economic assistance, accounting for a $1.4 billion shift from military to economic assistance in fiscal year 2003 (USAID, 2004, p. v).

constituted the highest priority for the U.S. government. Israel was by far the largest recipient, followed by Egypt. Israel received $81 billion since its creation, and Egypt has received $53 billion since the early 1970s. Another country regarded as a high priority was South Vietnam. During its short existence it received $24 billion in the form of U.S. grants and loans. In contrast, the entire sub-Saharan African continent has only received only $31 billion between 1945–2001 (Westad, 2005, p. 156).

Alberto Alesina and David Dollar (2000) take their analysis of statistical information on loans and grants a step further, and present a multivariate analysis of donor strategy which considers trade openness, democracy, civil liberties, colonial status, direct foreign investment, initial income, and population of the target countries. Their analyses are not restricted to U.S. government loans and grants, but rather include all donors from market economies. They find that former colonial empires (in particular, Portugal, United Kingdom, France, Australia, Belgium) spend more than half of their external aid on their former colonies. From 1970 to 1994 Portugal channeled 97% of its aid to its former colonies. In comparison, the United Kingdom allocated 78%, France 57%, Australia 56%, and Belgium 54% of their external funding to former colonies. Another variable, being a „U.N. friend", also proved important for donors' selection of target countries. The variable measures whether the target country has voted in line with the donor at U.N. conferences. This variable accounts for the Japanese funding pattern in the post-Cold War period. In the past decade, Japan directed funds to poor countries in return for a vote on admitting Japan as additional member of the U.N. Security Council. Although Alesina and Dollar's regression analyses cover all capitalist donors, their findings confirm the trend reported earlier for the U.S. government. Of all the donor strategies that capitalist countries employed to select target countries, political and economic interests in the Middle East, in particular access to a region with oil reserves, have overshadowed other considerations.

The authors (Alesina and Dollar, 2000, p. 40) also calculate the likelihood of a country receiving aid from capitalist countries if relevant variables, such as, initial income of the country or population size, are held constant. Their findings illustrate the high funding priority of the United States and its allies in the Middle East. All other factors kept constant, Egypt received 481 percent more and the value for Israel is basically off the scale. According to Alesina and Dollar's regression analysis, Israel should receive – based on the indicators used for other aid recipient countries – virtually no aid. Instead it receives $400 per capita from its closest allies (U.S.A., Germany, Italy, Austria, Netherlands). The two features that are least important for receiving aid are „being relatively open" (towards international trade) and „being relatively democratic" (index from Freedom House on a scale of 1–7). These findings reflect the preference of the U.S. government to either fund dictatorships that were undemocratic and isolationist, but yet open to trade with the U.S.A., or governments such as Guatemala, Argentina, Iran, Syria, Iraq, etc., that were intimately courted by the communist competitor. With the withdrawal of the United States from UNESCO (1984–2002) and the U.S. government's investment in and control of the World Bank, the selective funding of educational reforms became a potent educational policy and intervention tool applied to Third World countries. The loans and grants of the World Bank rewarded like-minded regimes for preserving their free market economies

despite the attraction that communist aid had to offer, particularly in the educational sector.

The World Bank and International Monetary Fund were to market economies what the Council for Mutual Economic Assistance (CMEA) was to socialist countries: a conglomeration of countries that served to maintain the stability of the international currency (dollars versus rubles), enable international trade, and contribute to economic growth of its poorest member states. Even though the economic objectives of these disparate international financial institutions were similar, their models of development varied considerably. Westad juxtaposes the two different models of development succinctly:

> One [development model], symbolized by the United States, promised intensive urban-based growth in both the private and the public sectors, the import of advanced consumer products and the latest technology through joining a global capitalist market, and an alliance with the world's most powerful state. The other, that of the Soviet world, offered politically induced growth through a centralized plan and mass mobilization, with an emphasis on heavy industry, massive infrastructural projects, and the collectivization of agriculture, independent of international markets (Westad, 2005, p. 92).

The two different conceptions of development had great repercussions for educational development in the Third World. The U.S. model emphasized economic growth, decentralization, decrease of public expenditures, and privatization, whereas the Soviet model focused on human capacity building, centralization, increase of public expenditures and collectivization. As expected, the Soviet emphasis on human capacity building was more beneficial to educational development in poor countries. By the end of the Cold War, most socialist countries achieved universal access to education and had much higher literacy rates than those Third World countries that were aligned with capitalist donors (see Steiner-Khamsi and Stolpe, 2006). Both superpowers, however, struggled with their reputation in the Third World. The U.S. model was reminiscent of capitalist exploitation during the colonial period. The Soviet model remedied the shortcomings of the capitalist model by emphasizing social justice and equality, but it suffered from its reputation for exporting second-rate products and technology to poor countries.

The first testing ground for Soviet aid was the Peoples Republic of China. As part of the Sino-Soviet Friendship Treaty, the Soviet Union established a large aid program that equaled 7 percent of the Soviet national income for the period 1953–1960 (Westad, 2005). As with other Soviet interventions, the expectation was to help establish the Soviet brand of state socialism in countries that received aid. In an attempt to intervene more effectively in the Far East (China, North Korea, North Vietnam), the Institute of Oriental Studies of the Academy of Sciences was established in Moscow. In 1960 an institute for the study of Africa was added. A year later, in 1961, Soviet knowledge of the Third World was further expanded with the establishment of an additional institute of the Academy of Sciences devoted to the study of Latin America (Westad, 2005). The declared strategy of Soviet aid was to support national communist parties in different parts of the world in their anti-imperialist struggle against the United States and its allies. With this rhetoric, aid was

given to any country that had a nucleus of a communist party intent on overthrowing the government. For example, substantial military, economic, and humanitarian assistance from the Soviet Union, as well as from Cuba and the GDR, were channeled into the Eritrean People's Liberation Front, African National Congress (operating from outside of Apartheid South Africa), the Movimento das Forças Armadas in Angola, the Mouvement National Congolais, and numerous revolutionary groups in other African countries and continents.

Historical facts matter a great deal in this type of research. It is important to bear in mind that the configuration of allies changed continuously over the thirty-year period of the Cold War. For example, the principle of superpower equality [détente] lasted from 1968 to 1975. Established by U.S. President Richard Nixon and Soviet leader Leonid Brezhnev after the defeat of American forces in Vietnam, détente constituted mutual recognition that each superpower (U.S.A. and U.S.S.R.) could intervene in domestic affairs of other countries. Aid, technical assistance, or educational development work were discovered as effective tools of political intervention. The superpower détente was severely resented by China which, for years, had objected to U.S. foreign policy more rigorously than the Soviet Union. Acknowledgement of a peaceful co-existence between the two superpowers, a plan the Soviet Union had pursued since the 1950s, signaled for Mao a betrayal and de-facto suspension of the world communist project. The Soviet Union, in turn, was convinced that China aimed to replace the Soviet Union as the international communist superpower. Situating itself as a flagship socialist country that, with its Great Leap Forward, overcame illiteracy, poverty and underdevelopment, China considered itself a leading example for other poor countries. The fallout with the U.S.S.R in the early 1960s led to Mao's peculiar Three-World Theory that situated China in the center of the South from where the anti-imperialist struggles against the richer nations was to be orchestrated.[4] Thus in the 1960s, the Third World was exposed to several spheres of influence: the United States and its allies, the Soviet Union and its allies, and China. The communist parties in Vietnam and Indonesia closely collaborated with China, and perhaps the most visible international involvement of Chinese experts was the construction of the railway linking Zambia to the Tanzanian coast.

The international race over the patronage of the South became an issue of survival for the United States and the Soviet Union. In both world-systems, competition over non-aligned nations was treated as a priority and government funding was made available for all kinds of institutions, including higher education. Universities in the United States and in the Soviet Union experienced a boom in area and development studies in the late 1950s and early 1960s. Similarly, socialist governments invested in the establishment of research and teaching institutions for Third-World studies. For both world-systems, the study of

4 Mao formulated his Three-World Theory in 1964 (see Westad, 2005, p. 162ff.). His world-systems theory placed the U.S.A. and the Soviet Union as hegemonic superpowers within the First World. The other industrialized nations that depended economically on the two superpowers constituted the Second World. Finally, China and the poor countries of the South made up a Third World. By means of revolution against the two superpowers, the countries of the Third World would eventually become the center of international development and power.

languages and cultures of non-aligned countries was just the first step towards operating in these countries as technical assistants, and ultimately securing international trade and political support. Not surprisingly, comparative education – both in the West and in the East – greatly benefited from this infusion of government funds during the period of the Cold War.

The Third World in U.S. Comparative Education

In the United States, Congress passed the National Defense Education Act (NDEA) in 1958 to improve the quality of education (especially in math, sciences, and foreign language instruction), and increase access to postsecondary and higher education by means of student loans and scholarships. A total of ten areas („titles") were listed as eligible for federal funding. In higher education these new areas were Title II (student loans), Title IV (national defense fellowships), and language and areas studies development (Title VI). These funding priorities were initiated in 1958 and are, at a much lower level of funding, available to this date.[5] Announced one year after the launch of Sputnik and presented as a national „educational emergency"[6] (NDEA, 1958: section 101), the NDEA actively promoted the study of languages and regions, including those deemed critical to the U.S. during the Cold War. The following excerpt illustrates the tone of panic evident in the Act:

> The Congress thereby finds and declares that the security of the Nation requires the fullest development of the mental resources and technical skills of its young men and women. ... To meet the present educational emergency requires additional effort at all levels of government. It is therefore the purpose of this Act to provide substantial assistant [...] in order to insure trained manpower of sufficient quality and quantity to meet the national defense needs of the United States (NDEA, 1958, section 101).

A review of the NDEA budget for 1963 illustrates the preoccupation with socialist countries. The top-ranking foreign languages in the early 1960s were Chinese and Russian. More precisely, 16% of the budget for Modern Foreign Language Graduate Fellowships was spent for Chinese and 13% for Russian, followed by Arabic (11%), Japanese (10%), Spanish (10%) and other languages (Office of Education, 1963: Figure 20). The U.S.-

5 In 2005, 60 universities were eligible to administer Foreign Language and Area Studies (Title VI) fellowships. The budget for 2005 fiscal year was $28.2 million and 926 year-long fellowships and 635 summer fellowships were funded. The Title VI international education programs remained the largest source of federal funding in which education is explicitly tied with national and global security. It is followed by the Homeland Security fellowship (created in 2003) which disbursed $15 million, and the National Security Education Program with a budget of $8 million in 2005 (Glenn, 2005).

6 The interview with U.S. Senator McClure, the initiator of the NDEA Act in Senate, provides very interesting background information on why the launch of Sputnik was seen as an opportunity to request government funding for higher education (McClure, 1983).

Soviet cultural exchange agreement of 1958 made it possible to take a peek behind the Iron Curtain in the form of organized study visits or tours. The interest in Soviet and East European languages and studies dropped drastically in the 1970s when government funding for foreign language and area studies dwindled. The number of doctorates earned in Soviet and East European Studies at American universities, for example, was at a peak in the decade 1970–1979 (3,598 doctorates), but then dropped by 60% in the period 1980–1987 (Atkinson, 1988).

Although the rhetoric for establishing NDEA was clearly embedded in the language of the Cold War, a great number of foreign language and area studies – regardless of whether they were in socialist countries or not – benefited from the infusion of government funds. In 1958, the U.S. Commissioner of Education designated 83 languages as critically needed, and identified six of them for first priority in development: Arabic, Chinese, Hindi-Urdu, Japanese, Portuguese, and Russian (Spanish was added in 1996, after the announcement of the U.S.-Latin American Alliance for Progress). By the end of 1962, four years after the implementation of NDEA, 56 of the 83 „critical languages" received federal support and 53 centers for area and language studies in higher education were established.

The boost in federal support for higher education generated very attractive incentives to establish area studies as well as development studies in education and the social sciences. For example, at my own university – Columbia University – the School of International and Public Affairs (SIPA), established in 1946, was able to build seven regional institutes in the period 1946–1962. The graduate school of education of Columbia University (Teachers College), in turn, embarked on „a decade of development" in 1957 and pursued a systematic plan to infuse international education in all programs taught at Teachers College (Butts, 1966).[7] The success was limited and only lasted as long as funding from the U.S. government and philanthropies (especially Ford Foundation) was available. Instead of internationalizing existing graduate programs of education at Teachers College, a separate degree program (International Educational Development) was created, and added to the already existing program in Comparative and International Education. Ironically, the coexistence of two international programs at Teachers College (Comparative and International Education, International Educational Development) should not be interpreted as an asset, but rather the expression of a failed attempt to internationalize Teachers College graduate programs in education. Nevertheless, the original plan to internationalize an entire graduate school of education is indicative of the political priorities in the 1950s and 1960s.[8] Also, other experiments lasted only as long as external funding was made available, such as, for example, a three-year program leading to a Master of International Affairs

7 In 1957, the Board of Trustees of Teachers College identified four tasks that would help to mainstream international education among the faculty and students of all degree programs at Teachers College (Butts, 1966, p. 3ff.).

8 The strategy of making funds available for faculty members that are willing to mainstream new initiatives is very common in U.S. academe. Apart from the internationalization of U.S. higher education in the 1960s, funds were later made available for multiculturalization (1980s and 1990s), or for a greater integration of technology and distance learning in teaching (past ten years).

and Doctor of Education (joint degree of SIPA and Teachers College), or a program in Education and African Studies, offered jointly by Teachers College and the Columbia University Institute of African Studies, and a program in Education and Latin American Studies, offered jointly with the Institute of Latin American Studies. Students acquired a two-year certificate of the respective regional institutes of SIPA, as well as an Ed.D. degree at Teachers College. The plan was to cover the entire world, that is, to establish joint degrees between Teachers College and all of the seven regional institutes of SIPA. However, federal funding for language and area studies and for technical assistance in Third World countries was drastically reduced during the Vietnam War. At Teachers College, the numerous initiatives and experiments of the Institute of International Studies could be sustained for another eight years with funding from the Ford Foundation (1965–1970), but were put to rest as soon as external funding dried up.[9] The Vietnam War not only diverted federal funding from the education sector to the army, but also created the image of the ugly American abroad. Freeman Butt summarizes the negative portrayal of U.S. technical assistance and its negative impact on international education as follows:

> The air of disenchantment surrounded other aspects of American foreign policy, notably, of course the Vietnam War. By association, American educational influence came under attack in some nations as „academic colonialism" (Butts, 1968, p. 1).

The U.S. Peace Corps, founded three years after NDEA, had the mission to first understand, and then influence the hearts and minds of people abroad. Ultimately, the NDEA also moved into this arena. In the same year, 1961, Congress passed the Foreign Assistance Act. U.S. foreign assistance was reorganized in ways that distinguished between military and non-military aid. As part of the Act's mandate, the U.S. Agency for International Development (USAID) was created to administer economic assistance programs.

Even though „the decade of development" lasted in most American universities for just ten years, it entirely transformed the field of U.S. comparative and international education. Before the heyday of language and area studies, U.S. comparative and international education research was exclusively Eurocentric, with a few exceptions in the form of „applied research" (projects) in developing countries. The proportion changed radically in the 1960s: With the exception of Soviet education, there was virtually no funding made available to study education in Europe. Most funding, and consequently the research focus, was directed towards educational development in the Third World. What has remained a constant in U.S. comparative and international education is the tool of single-country studies as the main method of inquiry dominating comparative education since its inception as an academic field.

9 The Institute of International Studies received a major grant ($750,000) from the Ford Foundation for the period 1965–1970, and a three-year extension (1970–1973) with a smaller grant of $90,000 (Butts, 1973).

The Third World in Comparative Education of the GDR

The development turn also occurred in Marxist-Leninist comparative education in the late 1950s, but then, since the 1990s, the focus on developing countries has almost completely disappeared with the dissolution or reconstitution, respectively, of former socialist comparative education societies. The objective had been to support the anti-imperialist struggle in the Third World. The Academy of Pedagogical Sciences of the U.S.S.R. opened a section on comparative education in 1966 (Sokolowa, 1966). According to Malkowa, the comparative education section of the Academy was well staffed: Already by 1970, 35 full-time scholars worked in collaboration with economists, philosophers, historians, and anthropologists (Malkowa, 1970; see also Sokolowa, 1966).

The academies of pedagogical sciences in other socialist countries followed suit.[10] Typically, the comparative education sections comprised three research divisions: education in socialist countries, education in capitalist countries, and education in developing countries.

A notable exception was comparative education in the GDR (German Democratic Republic) which, from the onset, included a fourth division dealing exclusively with education in the FRG (Federal Republic of Germany; see Busch, 1983; Kienitz, 1994). In fact, the Bureau for the German Question (Büro für gesamtdeutsche Fragen) in East Berlin preceded the establishment of a comparative educational research unit. The Bureau was already opened in 1954, that is, two years before the other three divisions were integrated into a new unit under the name „foreign education" (Auslandspädagogik). In 1974 finally, the GDR Academy of Pedagogical Sciences established a section on comparative education studies. The label „foreign education" was replaced with a name that was more commonly used in other socialist countries: comparative education.

The fact that comparison with West German education preceded comparative studies of education in socialist, capitalist, and developing countries, is not incidental. In discussing the impact of the Cold War on GDR comparative educational research one needs to keep in mind that in East Germany the neighboring FRG was perceived as the greatest anti-communist threat. Officially, the impetus for creating the GDR Bureau for the German Question was to maintain links to West German researchers and to reflect on the common German heritage in education (Busch 1983). The original, officially stated objective of German-German collaboration did not materialize and, on the contrary, both sides made great efforts to identify fundamental differences between East and West German education in an attempt to create and preserve a distance between the two systems (Anweiler, 1990; see John, 1998). When the wall went up in 1961 to prevent further mass

10 The GDR Academy of Pedagogical Sciences was established in 1970. Several research units previously hosted in the German Educational Central Institute (Deutsches Pädagogisches Zentralinstitut) were moved into the newly-founded Academy of Pedagogical Sciences. Admission of a research unit into the Academy of Pedagogical Sciences was prestigious; it meant the scientific recognition of the discipline or research field. The GDR Academy of Pedagogical Sciences recognized comparative education in 1974 as a legitimate science, and established the Section Comparative Education within the Academy.

emigration to West Germany, the cautious encounter between the two systems transformed into open hostility. After 1961, the GDR Bureau for the German Question was charged with the task of vilifying the FRG educational system. The Bureau ceaselessly criticized FRG educational researchers for disseminating anti-communist propaganda, for their vicious concealment of German colonial policy, and for being subservient to the imperialist educational policy of the FRG.

During the Cold War, the narrow focus on education in the other Germany was also discernible in FRG comparative education. After the end of World War II until 1990, the bulk of government funding for comparative education in the FRG was earmarked for studies on education in East Germany, Central and Eastern Europe, and the Soviet Union. Several comparative education research units, notably the ones at the German Institute for International Educational Research in Frankfurt a.M. and at the University of Bochum, West Germany, produced – under the directorship of renowned comparative education researchers Wolfgang Mitter (Frankfurt a.M.) and Oskar Anweiler (Bochum) – numerous studies on education in European socialist countries. Christel Adick, also at the University of Bochum, discontinued the earlier focus on socialist countries in Central and Eastern Europe but preserved the strong emphasis on contextual comparison and single case study methodology.

The GDR journal Vergleichende Pädagogik regularly reported on educational developments in other countries. It listed the reports in the four sections (education in socialist countries, education in capitalist countries, education in FRG, education in developing countries) mentioned above. The headlines, listed in the following table for two issues of the 1977 volume, capture the normative feature of comparative studies: the accounts of educational developments in capitalist countries and in the FRG evoke images of a fundamental crisis, the reports on developments in socialist countries document progress, and the ones on (non-aligned) developing countries, finally, imply an urgent appeal for socialist aid (see table 1).

The GDR journal of comparative education was published in a shorter version in 1960 and had, at 3,000 copies per issue, a vast circulation (John, 1998, p. 105). The journal was expanded in 1965 and issued four times a year. Beginning with the first issue of Vergleichende Pädagogik, the journal distinguished between the four groups of countries. Over the four decades of the journal's existence, several synonyms surfaced. For example, „education in fraternal states" was used interchangeably with „education in socialist countries," „imperialist countries" was a synonym for „capitalist countries," and correspondingly, „anti-imperialist countries" meant „developing countries." Approximately half of the reports and articles published in the journal were on educational development in socialist countries, in particular on education in the Soviet Union.[11] The strategic plan 1961–1965 for comparative education, issued by the Ministry of Education of the GDR, demanded such disproportional attention to Soviet education:

11 Busch (1983, p. 135) found in her content analysis of the journal *Vergleichende Pädagogik* that from the 269 articles and reports, published in the period 1965–1981, 127 were written on educational developments in socialist countries, 49 dealt with capitalist countries, 66 with the FRG, and 27 with developing countries.

Socialist countries, led by the Soviet Union: The numerous experiences should be evaluated and used for the development of a socialist school in the GDR and for our propagandist initiatives in West Germany. (cited in John, 1998, p. 57; emphasis in original)

Table 1 provides a comparison of articles published in the two journals in 1977.

	Vergleichende Pädagogik 13 (3), 1977	*Vergleichende Pädagogik* 13 (4), 1977
Socialist Countries	– Multilateral Cooperation of Educational Researchers – GDR: Conference of Educational Experts from Socialist Countries – GDR: Apprenticeship for Each School Graduate – USSR: Labor Education in Middle School – USSR: People's Education in the Kyrgyz Republic – USSR: Successful Results of People's Education in Azerbaijan – People's Republic of Poland: New Curriculum Reform Drafts Are Being Discussed – Mongolian People's Republic: More Schools Until 1980 – Socialist Republic of Vietnam: Training of Subject Teachers	– Closer Cooperation of „Comparative Education" with Journals of Fraternal States – USSR: 60 Years October Revolution – USSR: Importance of Labor Education – USSR: 80,000 Foreigners Complete Vocational and Higher Education – Teacher Education in Vietnam – Iraq: Emphasis on Compulsory Education – People's Republic of Yemen: School Reform Has Been Initiated – India: Soviet Textbooks in Indian Universities – Afghanistan: Educational Reform
Capitalist Countries	– Great Britain: The Quality of the Educational System Continues to Decrease	– Great Britain: Female Teachers Are Discriminated Against
FRG (West Germany)	– FRG: The Imposition of Ideological Manipulations in History Education – FRG: Child Labor Increases	– FRG: Children of Immigrants without Any Perspective – FRG: Educational Misery Deepens
Developing Countries	– Mexico: Demands for Better Education	– Bolivia: Illiteracy

Table 1: The Four Sections of the GDR Journal Vergleichende Pädagogik

The educational interest in developing countries experienced a boost in 1971 when the GDR was admitted as the 131st member state to UNESCO. As with other socialist states, the GDR defined its UNESCO mandate as two-fold: First, to demonstrate the inextricable link between politics, economics and educational development. Developing countries that

are committed to combating illiteracy need to first abolish exploitative structures that these countries have inherited from their colonial past. The prospects for eradicating illiteracy and securing universal access to education depend on whether revolutionary forces succeed in disempowering the ruling class in developing countries that hindered in the past, and continue to prevent in the present, equal access and outcomes in education. Thus, the fight against illiteracy needs to go hand in hand with an anti-imperialist, communist struggle against the ruling class which identifies with, and executes orders on behalf of, Northern countries, in particular the United States. The first mandate implied the need to document and make public the experiences from former developing countries, such as for example the Central Asian Soviet Republics that have successfully combated illiteracy soon after they chose the socialist path of development. Second, to challenge the monopoly over the project of world peace which the imperialist members of the United Nations tended to appropriate. In response to the claim of ownership over the project of world peace made by the NATO member states, and by the United States in particular, the Soviet Union emphasized its active role as one of the founding members of the United Nations, and highlighted the friendly ties it entertained with „the progressive states of Asia, Africa and Latin America" (Vavilov, Matveyev & Oleandrov, 1974, p. 18) to advance world peace. For Marxist-Leninists, communism was the only guarantor of world peace and international security, and the Soviet contribution consisted in networking progressive or socialist forces in different corners of the world so that these forces could resist colonialist and neo-colonialist exploitation. The „progressive policy in present-day conditions", which the Soviet Union attempted to strengthen, was rather narrowly defined in that it only included governments either already committed to, or seriously interested in, the socialist path of development (ibid., 1974, p. 19).

The unhappy Marxist-Leninist encounter with progressive forces in market economies deserves a special note. Progressive scholars, public intellectuals, or politicians in the West that advocated social justice or equity without calling for a revolution were seen as the real (class) enemy. It made their cause only more despicable if they referred to Marx or Engels to substantiate their appeal for non-revolutionary social changes. In fact, these progressives in education, ranging from John Dewey and his followers to Ivan Illich or Paulo Freire, were regarded as great a threat to communism as blatant fascist, imperialist or anti-communist demagogues who naively defended bourgeois ideology. A popular fallacy progressives in the West were advancing was belief in „reforms" and, by implication, an acknowledgement that class-based societies are fixable (Multilateraler Expertenrat, 1984). The term „reform", advanced by Marxist or Neo-Marxist intellectuals in the West, carried negative connotations in the East. After all, the educational systems of capitalist societies are beyond repair or reform. In addition, Marxist-Leninists in the East were quick to point out that in a class society a reform, fundamental or incremental for that matter, is only admitted if it corresponds with the economic interests of the ruling class.

The widespread disregard for a bourgeois ideology wrapped in progressive rhetoric cannot be overstated. Accusations of „pseudo-progressive" analyses were directed against any scholar who dared to write empathetically about Soviet education. For example, in

one of the most widely read Marxist-Leninist books on education in capitalist countries, Chorolski (1986) criticizes Robert Tabachnik and Thomas S. Popkewitz for reducing comparison to the educational sector rather than recognizing that the main distinction between socialist and bourgeois education lies with the differences in the economic and political foundation of the two systems. Precisely because bourgeois or pseudo-progressive comparative education researchers are, according to Chorolski (1986), so narrow or biased in their methodology, publications on socialist education [such as the ones by Tabachnik and Popkewitz] risk encouraging the reader to either selectively borrow from, or completely disregard the socialist experience in education.

Skepticism against progressive forces in non-socialist countries is also mirrored in the arguments with which the GDR expert for multilateral organizations, Dr. Ilse Gerth, criticizes the progressive tendencies within UNESCO. In internal documents to her superiors at the Academy of Pedagogical Sciences, Gerth regularly reported on the outcomes of UNESCO meetings and also re-iterated what the correct Marxist-Leninist reactions to UNESCO programs and resolutions should be. Perhaps the most graphic illustration of Marxist-Leninist review style is the edited booklet on the 18th General Assembly Meeting of UNESCO (Gerth, 1975). The editor selects controversial topics that were discussed at the 18th General Assembly Meeting and has response essays prepared on four topics. The headings of the four topics read as follows:

- The theory of the „world educational crisis"
- The bourgeois conception of life-long learning
- The terminology and feature of „innovation" in educational planning and activities
- The bourgeois position on „immigrant workers"

(Gerth 1975, p. 3)

The editor, Ilse Gerth, starts out by summarizing the UNESCO position on a controversial topic, then examines and compares the topic in the customary three groups of countries (capitalist countries, socialist countries, developing countries), and finally wraps up the correct Marxist-Leninist response to the UNESCO position. To highlight the section with the correct response, she consistently entitles the third sections „what there is to say?" (was ist dazu zu sagen?). Beyond differences in review style, Marxist-Leninist comparative researchers presented convincing arguments against the universal usage of UNESCO constructs. For example, the concept of „world educational crisis" (see Coombs, 1967) was sharply criticized. What bothered them most was the fact that U.S. president Lyndon B. Johnson supported work in this area (Gerth, 1975). In her review of the UNESCO document 19 C/4 (Program of UNESCO for 1977–1982), Gerth dismantles the world educational crisis as a bourgeois construct and requests that the imperialist member states basically speak or write for themselves (Gerth, 1976a). After all, there wasn't any educational crisis in socialist countries. On the contrary, socialist countries already had superior education in place, because socialism shielded the educational sector from the types of crises the capitalist countries at the time were typically exposed. Another vehemently attacked UNESCO term was the concept of permanent or lifelong education. Marxist-Leninist educational researchers (Széchy, 1986; Gerth, 1975) resented the selective borrowing of a concept that was saturated with socialist conceptions of education. The concept of lifelong

learning is quintessentially socialist. Not only should socialist systems be credited for having successfully implemented the notion of lifelong learning, but also it must be acknowledged that high-quality lifelong learning requires a political, economic, and social environment – such as socialist – in which lifelong learning is truly valued. Gerth (1975, p. 42) writes,

> Only the socialist educational system, which includes pre-school, school, after-school as well as all stages of post-secondary education, provides the necessary foundation for lifelong learning of high socialist quality. The socialist society implements the teachings of the founders of Marxism-Leninism in practice by conceptualizing learning as a lifelong process.

Research on multilaterals and, in particular, on the U.N. system has only begun to reflect on the Cold War era. With easier access to archival material in both world-systems, past accounts of important historical events are in need of re-examination. As mentioned in previous publications (Steiner-Khamsi & Stolpe 2006, p. 78ff.; Steiner-Khamsi & deJong-Lambert, 2006, p. 89), the role of socialist countries in leading, for example, the 1974 UNESCO Revolution has not been sufficiently investigated. Although Phillip Jones (1988, 2005) and Karen Mundy (1999) report in some detail on the demand for a new international economic order that was put forward during the 18th meeting of the General Assembly in 1974, they tend to reduce the Revolution to a shift in power relations between First and Third World countries. A singular event, the election of Amadou Mahtar M'Bow from a Third World country (Senegal) to Secretary General in 1974, has attracted too much attention for explaining why the United States, the United Kingdom, and Singapore left the organization a decade later. Other events during the 1974 meetings of the General Assembly that hint at the politicization of the organization, such as the UNESCO resolution against the Chilean military junta or against the Israeli occupation of Arab territories, deserve equal consideration. As Gerth, GDR comparative education researcher and government representative for multilateral organizations, noted in her report on 30 years of UNESCO, the 18th General Assembly Meeting was a breakthrough for socialist countries (Gerth, 1976b). The majority of member states finally recognized, after years of insistence by the first three socialist members (USSR, Ukraine, Belarus) „the need to understand the political dimension of educational issues" (ibid., 1976b, p. 356). The victory of the socialist position over U.S. perspectives, defeated during the 18th General Assembly Meeting, is amply documented in GDR comparative education.

Comparison: Quo Vadis?

In the Comparative Education Society of the GDR there was a fascinating intellectual debate on the objectives and methods of comparative research in education. Precisely because comparative education – along with all other bourgeois academic fields – had to be reinvented in order to survive, there was a flurry of academic debate over how to redefine it in terms of Marxism-Leninism.

The debates were initiated by Werner Kienitz, professor of comparative education and deputy editor-in-chief of the journal Vergleichende Pädagogik. An outstanding and devoted researcher with great integrity, Kienitz highlighted, for example, the fundamental difference between a bourgeois research paradigm that purports to be „value-free" and detached from any practical implications, as opposed to a Marxist scientific approach that is transformational, that is, useful for the revolutionary project of establishing a just and equitable society (Kienitz & Mehnert, 1966, p. 233). This first essay on the objectives and tasks of a Marxist comparative education was released in 1966 (ibid., 1966). The journal Vergleichende Pädagogik published, between 1972 and 1975, a total of 11 articles in debate format, including not only contributions of East German scholars, but also authors from the Soviet Union and other socialist countries. Over the same period, the controversies over how to redefine (bourgeois) comparative education in terms of Marxism-Leninism led to lively discussions at the annual meetings of the Comparative Education Society in the GDR and other socialist countries. The 1975 annual meeting in Leipzig sealed the intriguing discussion with a summary and official statement on the method of comparison. At center stage of the academic debate was the question of whether comparison should be universally applied, given that capitalist school systems are, from the Marxist-Leninist perspective, at a lower stage of development (Kienitz, 1972). The debate is documented in the journal Vergleichende Pädagogik, and the two exponents of the debate were the editor-in-chief Hans-Georg Hofmann (against comparison) and the deputy editor-in-chief Werner Kienitz (for comparison).

Hans-Georg Hofmann (1975) argued that comparison should be exclusively applied to „intra-system" comparison, that is, for comparison with other socialist countries and particularly with the Soviet Union, acknowledged as having attained the highest level on the socialist path of development. The argument was made that developments in capitalist educational systems should be observed and reported, but not compared. The anti-comparison position gained ardent support from Ilse Gerth (1973), in charge of international relations at the Academy of Pedagogical Sciences of the GDR. Subsequently, in line with positions held by the communist party, these opponents of cross-national comparison obtained a stamp of approval by the Comparative Education Society of the GDR. At their annual meeting, held in Leipzig, the debates over the past decade were reiterated and Kienitz' initial suggestion to compare educational systems in both East and West was officially dismissed (Kienitz, 1972). Hofmann (1975) summarized the distinctions between bourgeois and socialist comparative education discussed at the past few annual meetings, and concluded that Marxist-Leninist comparative education should abstain from comparison across political systems.

Starting in 1975, GDR researchers refrained from using the term „comparative education" for inter-system or cross-national comparison, and instead resorted to the term „Auslandspädagogik" (foreign education). At the same time, they ceased to engage in country-comparison and instead developed one-country studies, that is, extensive documentation of educational systems in capitalist countries with the sole purpose of documenting how far capitalist educational systems lagged behind socialist ones. The method of comparison was only applied to comparable educational systems, that is, to Soviet education and socialist educational systems. In contrast, educational developments in capitalist countries, in West Germany, and in developing countries, was amply documented but never compared to education in East Germany.

In the political „West", the phase of critical self-reflection has yet to be initiated in U.S. comparative and international education. In 2006, the U.S. Comparative and Education Society (CIES) and its journal Comparative Education Review (CER) celebrated their 50th anniversaries. What was conspicuously missing from the commemoration was reflection on paradigm shifts in the field of comparative education, in particular on the Cold War period in U.S. comparative education. In the discussions on the formative years of CIES and CER the Cold War is ignored in historical accounts to the extent that one wonders whether a serious taboo is involved. Could it be that the race of the two superpowers over patronage in developing countries, the patronizing role of international educational development, and the Cold-War agenda in development studies, are seen as embarrassing details in the history of comparative education, which preferably should be overlooked?

The Cold War triggered the development and area studies turn that U.S. comparative education experienced in the 1960s. The development turn has not only had consequences for the selection of target countries of research, averting attention from high-income countries and directing attention to low-income countries, but also huge methodological repercussions. Since the National Defense National Education Act (1958) and the Title VI Foreign Language and Area Studies fellowships, there are incentives to focus on one country only. Given their kinship with historians, most comparative education researchers have always seen themselves as area specialists, focusing on the history of education in a „foreign country." However, despite their area or context specialty, they did compare. Their analysis was embedded in contextual comparison.

South-South, North-South-South, or Standardized International Cooperation?

Very much like „globalization", South-South cooperation means different things to different individuals and institutions that, moreover, continuously update or adapt their definition of the term to new political, social and economic realities. Skeptics are quick in pointing out that the idea of South-South cooperation is not new, but rather dates back to the post-colonial period of the Cold War, or, as I would like to suggest, also existed in colonial times. One might argue that side by side with over-controlling core countries, there always existed a close collaboration between countries that were exploited and deemed peripheral.

South-South cooperation has resonated with the conventional donors, at least rhetorically, for one particular reason: aid has become standardized. The means governments in the global South use to achieve the standards or targets established by the North have become secondary. The new logic of the conventional donors consists of rigorous enforcement of international benchmarks for development, along with verbal acknowledg-

ment of national ownership over reforms which help achieve internationally established standards.

From the first international agreement, Education for All (1990), to the EFA-Fast Track Initiative (2002), which prescribes how educational systems must be reformed to achieve universal primary completion by 2015, governments receiving ODA loans or grants have had less room to maneuver. Since the direction, content or reform „package" is predetermined by international agreements, latecomers in development are encouraged to learn from, cooperate with, or adopt „best practices" from early adopters situated in the global South. Benchmark-oriented reforms are coercive in terms of content and the timeline of reform. At the same time, the international donors are discrete when it comes to choosing appropriate strategies for achieving benchmarks. However, constant monitoring and evaluation is a feature of this new donor logic because it enables international donors to stay involved. Despite the assurance of national ownership, the establishment of annual targets enables international donors to keep governments in line if the donors find that the governments did a poor job in implementing reforms.

Donors have set up knowledge banks as an elaborate apparatus for developing country-specific benchmarks. In the education sector, the World Bank has taken the lead in developing and drawing upon its knowledge bank to influence national reforms. In an era of evidence-based educational policy research and policy-making, knowledge banks constitute more sophisticated versions of databanks. These include data on the educational, economic, and social development of a country, and comprise a package of reform ideas or „best practices" that have already been tested in other ODA recipient countries. Most grant proposals to multilateral organizations refer to a crisis, outlined with an abundance of statistical information, followed by ideas on how to remedy said crisis through the adoption of „best practices" such as EMIS (Education Management Information System), pro capita financing, outcomes-based education, standardized student assessment, and a host of other traveling reforms funded by multilateral organizations.

Educational statistics provide the foundation for the standardized approach to assessing development needs and targeting aid outcomes. Unsurprisingly, in recent years every international organization, including international non-governmental organizations, has established its own databank with indices that measure regress or progress in categories such as children's rights and economic stability in the areas where they intervene. Indices, ranging from 0 to 1, or from 0 to 100, enable cross-national comparison and the construction of league tables. Naming, shaming and ranking have become powerful tools to generate or alleviate reform pressure. At the same time, UNESCO's resurgence in the international arena can be to some extent attributed to its regained capacity for collecting and analyzing data or monitoring progress towards Millennium Development Goals such as in the annually released Global Monitoring Reports.

The 2015 benchmarks of the EFA FTI Indicative Framework (Bruns, Mingat & Rakotomalala, 2003, p. 73) address three areas: service delivery, system expansion, and system financing. For example, one benchmark determines that the average annual teacher salary should be 3.5 times the annual per capita GDP by the year 2015. Another benchmark requires that the student-teacher ratio should be 40:1. According to the World Bank, these

benchmarks have been determined on the basis of empirical evidence. First, researchers at the World Bank examined 155 developing countries and identified sixty-nine top-performing educational systems with regard to universal primary education completion rates. These sixty-nine countries were deemed to be „on track", because they either already have, or are likely to achieve universal basic education by the year 2015. Second, researchers focused their analyses on the sixty-nine countries and asked what they „did right" in the areas of service delivery, system expansion, and system financing (Bruns et al., 2003, p. 58).

The study of knowledge banks as a new education policy tool is an emerging field in international and comparative education. Phillip Jones (2004) explains in detail the various stages of policy development at the World Bank, identifying the most recent as the era when the Bank envisioned itself both as an education policy lender and as a loan provider. Other scholars have also investigated the transformation of multilaterals, in particular the World Bank, into knowledge banks (see also Klees, Samoff & Stromquist, 2012). However they sometimes restrict their analyses to technology and knowledge transfer, i.e. the Global Gateway (King, 2002, 2005), or to the World Bank's Knowledge for Development (K4D) and Knowledge Assessment Methodology (KAM). It might be more accurate to see the proliferation of global databanks and knowledge banks as a consequence of the standardization of aid.

The emphasis on knowledge banks, in particular on the EFA-Fast Track Initiative, has served to illustrate that lesson-drawing or South-South transfer is nowadays mainstreamed in the operations of international donors. The countries that the World Bank identified as „off track" and „seriously off track" with regard to universal primary completion are supposed to learn from other poor countries that are „on track" (Bruns et al., 2003; EFA-FTI Secretariat, 2007). In this case the „best practices" of on-track countries are inscribed in the Indicative Framework of EFA-FTI. Ministries of education are supposed to bring their education sector plans in line with these „best practices" of well-performing systems, that is, how much they spend on primary education, what they pay their teachers, how big their class sizes are, what their repetition rates are, and a few other indicators. There is a surge of knowledge banks that include both statistical information on indicators as well as a portfolio of „best practices." The World Bank and other multilateral organizations are not alone in establishing such banks. In the wake of evidence-based policy-making, each and every major international organization resorts to their own data and „best practices" for areas that matter to them.

South-South or East-East transfer occurs, but from where did the benchmarks, targets, and interventions emanate? In most cases we deal with a North-South-South transfer or West-East-East transfer, whereby donors in the North or West, respectively, have designed a standardized reform or intervention package for the global South. Nevertheless it is striking that international organizations increasingly endorse South-South transfer or, to frame it differently, encourage lesson-drawing from other countries that already successfully implemented externally financed reforms. International donors have also endorsed, at least rhetorically, South-South cooperation. Different from South-South transfer, South-South cooperation includes, aside from transferring „best practices" from one poor coun-

try to the next, also technical assistance by consultants, regional meetings and joint planning among policy-makers, and educational exchange among countries of the South.

As with transfer, cooperation among the individuals and institutions in the South reflect a changed aid environment. It is an environment that has become increasingly standardized, prescriptive and coercive for national governments. The new emphasis is on benchmarks, standards, and targets. How governments in the South achieve these benchmarks, established in the North, is secondary. In fact, „national ownership" has become the new buzz of the new millennium, and how governments choose to implement reforms in line with the internationally set targets is left, to some extent, up to them. In this new era of evidence-based policy-making and standardized aid, South-South cooperation can be seen as a vehicle to accelerate the accomplishment of development targets, established by the North. Perhaps we need to curb our enthusiasm for this revitalized concept in development and acknowledge instead that South-South cooperation is part and parcel of standardized aid, designed, funded and monitored by the North. The „Cartel of Good Intentions" (Easterly, 2002) has strengthened and expanded its global governance and is now granting some leeway to ODA-recipient governments in the South; but only to achieve the standardized targets, determined in the North, in a more efficient and, if possible, in a more cost-effective manner.

Adick's lifelong commitment to comparative education and educational reform in developing countries spans over several decades. Today, we are at an interesting crossroads in comparative and international education and a more inclusive definition of the field is very much needed; one that accomodates scholars that do cross-national comparison (e.g., OECD and IEA type studies) as well as single country case study researchers, scholars that focus on OECD countries as well as scholars that primarly work in developing countries, and scholars who associate themselves with comparative methodologies as well as scholars who see themselves as educational researchers with an international comparative outlook. Adick's distinguished scholarship has greatly advanced studies on case study methodology, developing countries, and educational reform from an international comparative perspective. Equally important is her unwavering support for international cooperation with aid-recipient countries, in particular in Africa but also in other parts of the world.

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