



# Influence of Comparative Education on Comparative Adult Education Research and Practice

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## Zusammenfassung

Comparative Education bietet vielfältige Möglichkeiten für kulturell kontextualisierte Analysen zu länderspezifischen Besonderheiten von Bildungssystemen und Erwachsenenbildung. Ziel des Beitrags ist es komparative Zugänge vorzustellen und deren Wirkungen zu erkennen und zu analysieren. Zwei Fragestellungen sind leitend: (1) Welchen Einfluss hat Comparative Education auf eine (komparative) Erwachsenenbildungsforschung? (2) Welche Faktoren werden dabei für die Praxis der Erwachsenenbildung relevant und bedeutsam? Im Ergebnis werden ausgewählte Schlüsselfaktoren und -prinzipien sichtbar, die zukünftig zu einer möglicherweise größeren Wertschätzung vergleichender Forschung in der Erwachsenenbildung beitragen können.

**Stichworte:** international education, comparative research, comparative analysis, transnational education, comparative studies

## Abstract

Comparative education offers a wide range of opportunities for culturally contextualized analyses of country-specific characteristics of education systems and adult education. The aim of this article is to present comparative approaches and to identify and analyse their effects. Two questions are leading: (1) What influence does Comparative Education have on (comparative) adult education research? (2) Which factors become relevant and significant for the practice of adult education? As a result, selected key factors and principles will become visible that may contribute to a potentially greater appreciation of comparative research in adult education in the future can.

**Keywords:** international education, comparative research, comparative analysis, transnational education, comparative studies

## 1 Introduction

The meaning, perception, and significance of adult education vary between and within certain countries in the world. In some corners of the globe, adult education is perceived as the provision of basic literacy courses. In some other corners, adult education is perceived as popular education offered by community-based or civic organizations. On the other hand, adult education is also seen as formal and non-formal education programs for adult students (in contrast to youth) and non-traditional adult students. Consequently, adult education scholars have used research paradigms, approaches, and strategies offered by comparative education to explore and analyze similarities and differences in philosophies, policies, and practices of adult learning policies and practices between countries or societies. Obviously, critical inquiry plays an important role in comparative education in the sense that it allows to „bringing the interested inquirer into a deeper examination of tension among society, development, and education and the roles that citizen, either directly or indirectly, play in the educative process” (Kubow & Fossum, 2007, p. 6). The purpose of this article is to analyze the implications of comparative education for comparative studies in adult education and learning. The following research questions guided the inquiry for this paper: (1) What is the influence of comparative education on comparative adult education research? (2) What are some factors of relevance and significance for comparative adult education studies and practice? The methodology that guided this article is based on reviews of exiting literature encompassing selected journal articles, books, and research reports related to comparative and international education, comparative research, comparative education research, adult education, comparative adult education, and comparative adult learning. Keywords such as adult education, comparative education, comparative adult education, and adult learning were used to search for peer-reviewed articles in scholarly databases (e.g., Education Research Complete, ERIC, and Google scholars). Information from articles and books were used based on the credibility of the sources, the credentials of the authors, and their adequacy to help address the research questions.

## 2 Influence of Comparative Education on Comparative Adult Education Research and Practice

Comparative education has influenced comparative adult education research and practice. The following sections will identify and analyze ways comparative education influence comparative adult education research and practice, as well as comparative studies in adult education.

### 2.1 Comparative adult education research

Comparative adult education research is the investigation of adult education and learning policies, systems, structures, stakeholders, and practices through compara-

tive research methods and analyses. Comparative adult education research is a twined specialized area of knowledge or line of scholarship that is positioned at the juncture of comparative education and adult education. According to Charters and Hilton (1989),

"Comparative study is not the mere placing of data side by side [...] such juxtaposition is only the prior requisite for comparison. At the next stage one attempts to identify the similarities and differences between the aspects under study... the real value of comparative study emerges only from (...) the attempts to understand why the differences and similarities occur and what their significance is for adult education and the countries under examination (p. 3)."

Adult education is specific to each country, and tends to be a reflection of the culture, policies, and priorities of a society. Nuisl and Pielorz (2008) argued that comparative adult education serves four purposes:

1. *Benchmarking*: Comparing the locate, national or regional strategic social and economic systems of a country with other nation-states.
2. *Learning from 'abroad'*: Analyzing and reflecting on national/regional situations for cross-national understandings.
3. *Transfer of knowledge and procedures*: Exploring the potential to borrow actions and strategies that appear to help solve problems in other countries.
4. *Fostering of cooperation*: Promoting links between individuals, institutions/agencies, governments, and non-governmental organizations (NGOs) between at least two different countries.

Having said that, it is important to acknowledge that there is a debate regarding whether or not comparative adult education constitute a distinctive disciplinary arena (Reischmann & Bron Jr, 2008; Field, Künzel & Schemmann, 2016). Whether or not comparative adult education represents a distinct disciplinary arena, it is still relevant to look at the implications of comparative education for comparative adult education studies.

## 2.2 Influence of comparative education for comparative adult education research and studies in adult education

The implications related to comparative studies in adult education will be considered in the light of the Tilly (1984) framework for comparative analysis, the Bray and Thomas (1995)'s cube for multilevel comparative education research, and the Egetenmeyer (2016) framework for comparative adult education studies.

### The Tilly (1984) framework for comparative analysis

Tilly (1984) advised four types of comparative analysis, which can also inform research in comparative adult education: individualizing, universalizing, variation-finding and encompassing (p.82).

*Individualizing comparison*: This type of analysis is performed to fully describe the characteristics or features for each of the cases being studied in order to grasp

the peculiarities of each case (Tilly, 1984, p. 82). Such analysis enables to see cases in-depth, although Frederickson (1997) argued that this is not a true comparison. In the context of comparative adult education research, Roland (1997) published a comparative adult education study on Asia and the Pacific, which individualized the cases of Cambodia, India, Papua New Guinea, The Philippines, Thailand, Uzbekistan, and Vietnam, with respect to policies, issues, and trends in adult education.

*Universalizing comparison:* According to Tilly (1984, p.82), this form of comparison ‘aims to establish that every instance of a phenomenon follows essentially the same rule’. This involves the use of comparison to develop conceptual or theoretical framework. For example, Bhola (1998) published a study that analyzed „world trends and issues in adult education on the eve of the twenty-first century” (p. 485).

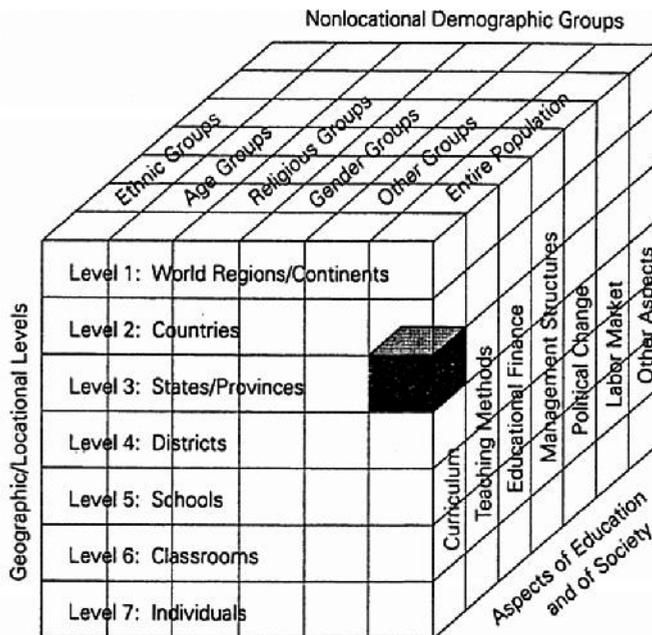
*Variation-finding comparison:* This analysis is to „establish a principle of variation in the character or intensity of a phenomenon by examining systematic differences between instances” (Tilly, 1984, p. 82). This enables to compare numerous facets of a single phenomenon to discover logical differences among instances and establish a standard of variation in the character or intensity of that phenomenon. A good example of a variation-finding comparison would be Schuetze and Slowey’s (2002) study, which compared variation related to participation and exclusion of non-traditional adult students and lifelong learners in higher education.

*Encompassing comparison:* Tilly (1984, p. 83) explained that such analysis „places different instances at various locations within the same system, on the way to explaining their characteristics as a function of their varying relationships to the system as a whole”. Encompassing comparison is a subset of variation-finding comparison, which focuses on explaining a variation through an underlying general causal mechanism. One example of encompassing analysis would be Grabowski et al. (2016) study that compared traditional and non-traditional adult students in order to analyze their distinctiveness, as well as the impact of age, major selection, socio-culture, environmental factors, and enrollment status on their degree completion.

### **The Bray and Thomas (1995) Cube for comparative education**

The Bray and Thomas (1995, p. 475) cube offers levels of comparative studies to guide research in comparative education. As Figure 1 indicates, the cube depicts 7 geographic/locational levels of analysis (i. e., World regions/continents, countries, states/provinces, districts, schools, classrooms, and individuals), 6 categories of non-locational demographic groups (i. e., ethnic, age, religious, gender and other groups, and entire populations), and aspects of education and society (i. e., curriculum, teaching methods, finance, management structures, political change and labor markets) that can be combined based on specific research problems or research interest to conduct multilevel, multifaceted, and systemic comparative education research studies.

The Bray and Thomas (1995) provides a framework to conduct comprehensive comparative education studies, including comparative adult education studies that go beyond a single level of analysis.



**Figure 1:** A Framework for Comparative Education Analyses (Source: Bray & Thomas, 1995, p. 475)

The Bray and Thomas (1995) cube is a classic in the literature on comparative education, and it is therefore relevant for studies in comparative adult education. However, critiques have raised concerns about the hierarchical orientation and the strong focus on national levels of comparison of the Bray and Thomas (1995) cube. Further, given the varieties of adult education programs and adult learners, and the influence of globalization on education, the Bray and Thomas (1995) may not enable to conduct comparative studies that account for transnational contexts. The criticism the Bray and Thomas (1995) cube is even more relevant in contemporary times heavily influenced by globalization and transnationalness. Egetenmeyer (2016) had meaningfully added new facets to the Bray and Thomas (1995)'s cube, and such contribution could be very well labelled The Egetenmeyer (2016) framework. Egetenmeyer (2016) had modified the Bray and Thomas (1995)'s cube to account for transnational contexts, among other factors.

### **The Egetenmeyer framework (2016) for comparative adult education studies**

According to Egetenmeyer (2016), a comparison enables to analyze individual cases, identify similarities and differences, and search for justifications. Egetenmeyer (2016) proposed a framework based on the foundations of the Bray and Thomas (1995)'s cube, which includes three comparative dimensions:

- (Non) Participants and learners
- Provisions/effects,
- The transnational context

The first dimension is about (non-)participants and learners in adult education and learning with respect to educational biography, migration biography, employment situation, civic engagement, and gender. The provisions and effects concern policies and politics, professional situation, providers and institutions, educational provision, and learning and competences. The transnational contexts are related to country(ies), community(ies), province(s), group(s) of (adult) learners, place(s) of adult learning, and (international) organizations. Egetenmeyer (2016) also accounted for sectors (i. e., state, market, civil society) and time (i. e., past, current, and future). In a sense, the Egetenmeyer (2016) combines elements of the Bray and Thomas (1995)'s cube, and implicitly some aspects of the Bray, Adamson and Mason (2014) framework, which presents comparative education research based on units of comparison, such as places, systems, times, race, class and gender, cultures, values, policies, curricula, pedagogical innovations, ways of learning, and educational achievements.

The Egetenmeyer (2016) has meaningful implications for comparative adult education research. It provides a framework for research design in comparative adult education that fills the gaps identified in Bray and Thomas (1995)'s cube. Contrary to Bray and Thomas (1995)'s cube that was designed for comparative education in general, the Egetenmeyer (2016) frameworks focuses primarily on the contexts and realities of adult education. Egetenmeyer (2016) framework provides an opportunity for multilevel analyses in comparative adult education that account for transnational contexts, (non)participants and learners, provisions and effects, as well as sectors and time. The opportunity to conduct comparative studies in adult education that go beyond the mere surface descriptions of similarities and differences is now limitless.

However, it is important to stress that the Egetenmeyer (2016) framework can still be improved to perfect its transnationalness. For example, in the facet related to (non)participants and learners, Egetenmeyer (2016), lists educational biography, migration biography, employment situation, civic engagement, and gender as key factors to consider. There is an implicit implication that such factors are characteristics of adult learners in general. Migration biography while relevant for some countries is not a relevant characteristic of adult learners across the globe. Many adult learners in Western and non-western countries are natives of their town/city or country who do not have a personal migration biography to account for in a comparative analysis. Therefore, instead of migration biography, the framework could be enhanced by account for social and cultural identity, and social roles, which play an important role in influencing adult learning.

### **3 Factors of Relevance and Significance for Comparative Adult Education Studies and Practice**

Beside the basic principles of research such as a sound research design or validity and reliability of an inquiry, appropriate data analysis and reporting, comparativists in adult education should take intentional steps to ensure the relevance and signifi-

cance of their studies. This is especially important given the fact that culture, cross-culturality, and transculturality play a key role in comparative research, and consequently carry potential for misinterpretation, bias, judgmentalism, and even ethnocentric abuse in a comparative inquiry. As a result, comparativists in adult education should account for factors such as justification of case selection, appropriateness of research question/s, positionality, comparability, cross-cultural context, equivalence, suitable analytical framework, applicability, and glocality/glocalness.

*Justification of case and variable selection.* Ragin (2014) advised several types of analytical methods to perform comparative analysis that are based on cases and variables. Case-oriented comparative methods aim at conducting historically interpretive and causal analysis (Ragin, 2014, p. 35). The purpose of a case-oriented comparison is to produce generalizations on theoretically defined categories. The variable-oriented comparative methods are theory-centered in the sense that they intend to test theories, provide macro-societal explanations about a phenomenon, or establish probabilistic relationships between/among variables. Obviously, Ragin (2014) explained that cases and variables can be combined in a comparative study in order to perform some form of hybrid comparative analysis. Comparative studies can be mononational (i. e., comparison of cases/variables within a single country), cross-national (i. e., comparison of cases/variables between two countries), regional (i. e., comparison of cases/variables within the geographic region of several countries or between several geographic regions), or transnational (i. e., comparison of cases/variables across/beyond the single borders of multiple countries regardless of geographic locations). A justification is required for cases or/and variables selected to conduct a comparative adult education study. Comparative adult education should not be conducted just because it is fun, but instead because there is a scholarly or fact-based justification to compare the cases and/or variables under consideration.

*Appropriateness of research question/s:* Asking appropriate comparative research question/s is key for a valid comparative adult education study. An appropriate research question should include a (a) stem (i. e., What...? How...? To what extent ...? In what ways...?), (b) one or more variables or concepts, (c) cases or target populations related to the variables, (d) a comparative setting (i. e., mononational, cross-national, regional, or transnational units of comparison), and (e) (non)projected relationship between/among variable/s and/or the cases. Depending on the nature of the research design, comparative research question/s can be (a) descriptive (i. e., asking about the occurrences of a phenomenon and the similarities and differences between cases), (b) exploratory (i. e., asking about relationship between cases/variables and potential for more in-depth studies), (c) explanatory (i. e., asking about cause-and effect relationships or relation and consequences between variables or between variables and cases or target populations).

*Positionality:* Trethewey (1976) argued that comparative education „may take the form of study of responses in other societies to problems that appear very (much) similar like the ones that you recognize in your own educational system” (p.2). In other words, a comparativist tends to explore, study, analyze, or compare the educa-

tional value system of other countries through a comparative approach that equips evaluating one's own culture and educational values (Kubow & Fossum, 2007). This comparative dynamic brings to light the positionality of the researcher who carries specific social and cultural backgrounds with potential to pass judgment about another country, society, or system. The positionality of a comparativist is factual, and unavoidable by virtue of being an outsider when making comparison with another unit or case. Merriam, et. al (2001) assert that „Positionality is thus determined by where one stands in relation to ‘the other’” (p. 411). Positionality in comparative adult education should be viewed as intersectional. In other words, the positionality of a comparative adult researcher can be based on one or several factors that intersect with respect to culture or sub-culture, ethnic identity, gender, sexual orientation, ideology, religion, values, region, and other similar factors. Positionality is particularly important for comparative adult education studies that involve data collection from human subject. In the context of comparative adult education, and any comparative study for that matter, positionality must be acknowledged by the researcher, and plans should be put in place to negate its effect that can affect the entire comparative inquiry process. Further, reports of research findings should include statements about specific strategies used to neutralize the potential bias effect of positionality.

*Comparability:* According to Good (cited in Raivola 1985), comparability in comparative and international educational research explains a situation that occurs „when two measures are expressed in the same units thus making possible direct comparison” (Raivola 1985, p. 362). In other words, variables, units of comparison or cases should involve components of phenomena that appear at the same level. For example, the categories of adult learners may be different for two given countries. The U. S. is a good example, because adult learning can take place within the traditional school system. For example, the General Educational Development (GED) is traditionally an adult education program in the U. S. However, it has become an acceptable credential for high school dropouts who were supposed to be in the traditional secondary (high school) education system. So, a comparison between learners in a high school GED and a language or literacy program for a group of young adult learners in another country would fail the comparability fit test. The comparability fit test is basically the extent to which it is possible and justified to compare, scientifically, various social and/or cultural systems, units of comparison or cases. Triandis and Berry (1981) asked and answer an important question about comparability, which can help guide comparative adult studies „...when a common underlying process exists can there be the possibility of interpreting differences in behavior? When such dimensional identity or common underlying process is demonstrated, then comparability is established” (p. 8). Warwick and Osherson (1977) suggested some key steps that can inform comparative adult education research:

- a) Do the concepts under comparison correspond? In other words, do the concepts have identical definitions although the meanings might be contextually different with respect to general-specific continuum definition given to concepts and linguistic and operational formulation of such concepts?

- b) How will the correspondence of measurements be established or assessed? In other words, how will the correspondence of measurements account for concepts that have bonds with culture?
- c) To what extent the problem of how concepts are linguistically expressed can be resolved? In other words, how will the linguistic and operational formulation of concepts account for variations between and within cultures?

Comparability requires that comparative adult education studies focus on cases that are related. Obviously, the question of comparability is associated with other factors such as cross-cultural context and equivalence.

*Cross-cultural context:* Culture affects societies, communities, institutions, systems, as well as the teaching and learning processes in adult education. In a comparative adult education study, it is possible for assumptions, cultural backgrounds, and systems of values to potentially induce prejudice and cultural bias in the process of designing a study, gathering and analyzing data, and reporting the findings. As such, a comparative adult education study involves implicitly or explicitly a cross-cultural comparison that implicates at least some aspects of cultural values. Farell (1979) argued that „each hypothesis concerning education calls for cross-cultural treatment” and emphasized that „a claimed relationship holding true in a given community is not particularly useful unless the nature of that relationship is understood” (Farell, 1979, as cited in Raivola, 1985, p. 365). The implication is that comparative adult education studies should account for the cross-cultural context, because this would assist in studying issues heuristically, thus „enables terms to be more precisely formulated, helps in the classification of phenomena, and points to testable hypotheses” (Raivola, 1985, p. 365). A systematic intentional plan for factoring cross-culturality can help reduce the potential for prejudice in comparative adult education research (Osborn, 2004). At the end of the day, one of the purposes of comparative adult education is to analyze educational issues related to adult learning or adult education phenomena in a cross-cultural context. Raivola (1985) cautioned that it is „out of the question for researcher from a foreign culture to penetrate the relationship using only statistical methods” (p. 373). The cross-culturality in comparative adult education also involves issues of ethical procedures when a comparison involves the participation of human subjects. Simons and Usher’s (2000) advocate for situated ethics that reflects specific local/cultural practices, which have implications for comparative adult education with respect to fundamental ethical consideration elements in empirical research such as, participants’ informed consent form (i. e., written versus oral), privacy, disclosure, use of recording devices, intrusion of gate keepers, among many others.

*Equivalence:* Vijver and Leung (1997) asserted that the meaning of equivalence is „a function of characteristics of an instrument and of the cultural groups involved” (Vijver & Leung, 1997, p. 9). Equivalence helps capture different characteristics of a concept, phenomenon, or systems in cultures. In other words, equivalence allows to make comparisons by creating individuality/uniqueness levels of the studied instrument and the groups. Nowak (1977) mentioned several types of equivalences that in-

volve comparative education research, and consequently comparative adult education studies:

- a) *Cultural equivalence*: Observations and judgment of phenomena occur in the same way in different cultures;
- b) *Contextual equivalence*: The object of comparison belongs to a higher level of systems that have earlier definition as equivalents;
- c) *Functional equivalence*: The objects of comparison have a similar role in the functioning of the system;
- d) *Correlative equivalence*: Phenomena correlate empirically in similar way with the criteria of variables;
- e) *Genetic equivalence*: Phenomena under comparison derive from the same source, or conceptual class.

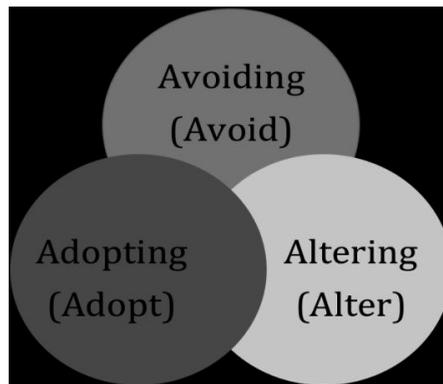
*Suitable Analytical Framework (Theoretical or conceptual)*: Comparative adult education studies should be rooted in an analytical framework to avoid producing findings that are surface descriptions of similarities and differences. A suitable framework should enable to establish the link between the mega/macro (i. e., a scholarly establish framework) and the micro (i. e., the specific context of a comparative adult education study). Analytical frameworks are based on philosophical and methodological assumptions and interrelationships that help design a research study, thus influencing the data gathering and analysis processes. Analytical frameworks can be theoretical (theoretical framework) or conceptual (conceptual framework). A theoretical framework is simply the utilization of an established theory to inform an inquiry process. According to Chinn and Kramer (1999, p. 258), a theory is an „expression of knowledge.... a creative and rigorous structuring of ideas that project a tentative, purposeful, and systematic view of phenomena”. A theory includes a set of assumptions or interrelated propositions, concepts and definitions, articulates the relationships between/among concepts, and provides explanations/predictions about a phenomenon or phenomena based on specific relationships. A conceptual framework tends to derive from one or several theoretical frameworks, and includes concepts and operational definitions, articulates the relationships between/among concepts, in order to provide empirical or more concrete explanations/predictions about a phenomenon or phenomena. Liehr and Smith (1999, p. 7) define a concept as „an image or symbolic representation of an abstract idea”. According to Miles and Huberman (1994, p.18), a conceptual framework is a written or visual presentation that „explains either graphically, or in narrative form, the main things to be studied – the key factors, concepts or variables and the presumed relationship among them”. Grant and Osanloo (2014) argued that an analytical framework (i. e., theoretical or conceptual) helps bring clarity, structure, evidence of academic standard, and strength to a research study.

*Applicability*: Applicability is an important factor to consider when conducting comparative adult education research. The purpose of a comparison is not to pass judgment on another society, culture, or system of education. It is instead to explore,

identify, and analyze similarities and differences, and consequently contribute to the literature, and decide on potential for adopting, altering, or avoiding what works in a comparative setting or context. As Figure 2 indicates, adopting, altering, and avoiding are facets of an appreciative perspective of comparative education with respect to the applicability of findings from a comparative inquiry. *Adopting* consists of borrowing what works in comparative settings or contexts.

*Altering* implies adopting partially and with significant local adaptation what works in a comparative setting or context.

*Avoiding* implies to learn from experiences of failures in comparative settings or contexts, in order to decide on what not to do.



**Figure 2:** Appreciative Comparative Education

The applicability of a comparative adult education study could be ensured by providing as much detail as possible regarding the inquiry process. Obviously, applicability should be based not sole on the findings from a comparative adult education study, but also on the justification for comparability, cross-cultural context, and equivalence. As Koufogiannakis and Crumley (2004, pp.1–4) and Booth (2004, p. 3) explained, applicability should help determine whether findings from a comparative study are: (a) directly applicable, (b) requires local validation, (c) adaptable, or (d) useful to inform one’s understanding about a situation or a phenomenon.

*Account for Glocality/Glocalness:* The world has become a globally interdependent community with bidirectional relationship between the global and the local (Jean-Francois, 2015, Robertson, 1995). The reality of the global has affected policies, curriculum, instructions and practices of education through international migration, conflicts and wars, as well as the windows of opportunities opened by Information and Communication Technologies (ICT). However, the impacts of the global play into local/national contexts with specific cultures, values, and histories inherent to adult education that do not always align with the fundamental assumptions of globalization. Esser and Pfetsch (2004) argued that „in times of growing globalization and supranational integration...it is becoming increasingly difficult to treat societies and cultures as isolated units” (p. 401). Consequently, the design of comparative adult

education studies should account for the dynamic of relationships or interactions between the global and the local, since such dynamic may affect research feasibility, design, validity, and relevance of a comparative inquiry. In a transnational context, adult education policies, scholarship, and practices may have been influenced by similar global trends, but such influences may play out, be received or interpreted differently within local/national contexts. Analyses in comparative adult education studies should incorporate the link between adult education cases or variables with transnational structures or contexts.

## 4 Conclusion

The paper identified and discussed the influence of comparative education on comparative adult education research and practice. It further elaborated on some key factors that can contribute to the relevance and significance of comparative studies in adult education. The aforementioned factors, namely justification of case selection, appropriateness of research question/s, positionality, comparability, cross-cultural context, equivalence, suitable analytical framework, applicability, and glocality/glocalness, are not necessarily required for all types of comparative studies. There may be studies for which all of them are applicable and other studies where some of them only are applicable.

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### **Review**

*Dieser Beitrag wurde nach der qualitativen Prüfung durch das Peer-Review und die Redaktionskonferenz am 20. Februar 2020 zur Veröffentlichung angenommen.*

*This article was accepted for publication following a qualitative peer review at the editorial meeting on 20<sup>th</sup> February 2020.*