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GLOBALISATION, EDUCATION AND POLICY: CHANGING PARADIGMS

1. INTRODUCTION

The chapter analyses the nexus between globalisation, policy and comparative education research during the last three decades. It focuses on the changing prominence given to various topics in educational policy and comparative education and the way conceptual thinking in this area has changed and developed, due to forces of globalisation and ideological transformations. An attempt is made to link both the shifts in focus on various educational planning policy themes and issues, dominant ideologies, and the major paradigm shifts in comparative education and policy in each decade during the period. In doing so, the chapter analyses and evaluates the following three broad interlinked themes:

- The shifts in methodological approaches in globalisation, policy and comparative education policy research
- Central issues and shifts in focus in comparative education policy research and globalisation
- Structural changes in globalisation, policy and comparative education.

The chapter demonstrates the emergence of the following three major paradigms shifts in education and policy between the 1970s and 2000:

1. The major paradigm shift of the early 1970s between positivism (empirical/quantitative research) and anti-positivism (non-empirical/qualitative research) began to question the very construct of ‘value-free’ empirical research and the scientific dominance of empiricism. This paradigm shift reached its heights in the 1980s, as illustrated by post-structuralist and post-modernist education and policy articles. Described as a ‘postmodernist revolt’ (Mitter, 1997) against the dominating theories of the Enlightenment and modernity, such a paradigm shift in policy directions challenged the meta-narratives in education and policy, the ‘regime of truth’, the disciplinary society, and promised to empower the learner, by re-affirming the centrality of the learner in the curriculum, and diversity of learner needs (Zajda, 2002; Zajda, 2003b).
2. In educational planning and policy reforms the shift has been from the ‘linear’ model of expansion in education, based on the ‘more is better’ metaphor, and the human capital theory, which had dominated policy-makers and reforms during

the 1960s and the 1970s to the qualitative, more holistic, ‘global security’ focused, and ‘integrative’ aspects of policy directions and policy reforms (Williams, 2000). ‘Human capital’ is a term for ‘the practical knowledge, acquired skills and learned abilities of an individual that make him or her potentially productive and thus equip him or her to earn income in exchange for labour’ (Johnson, 2000). Gary Becker, who was awarded Nobel Prize in economics in 1992, pioneered a model for investment in people as investment in human capital in the 1960s.

3. The key policy issues as reflected in education and policy reforms during the last three decades could be described as the restatement of an egalitarian-inspired imperative – the equality objective – ensuring that the equality and quality of educational opportunities enjoyed only by the best-served few are available to all. Specifically, the central policy issues dealt with the provision of compulsory education for all children (including the changing nature of universal primary education, in developing countries), equity, school choice, and the influence of home background on academic achievement.

2. MAPPING OF EDUCATIONAL POLICY AND CHANGE

Education policy articles published range from the analysis and evaluation of education, international comparisons of school reforms and educational plans/curricula to reports of special commissions and international agencies. Policy statements often refer to primary, secondary, vocational and higher education indicators (cross-country comparisons, enrolment patterns, public expenditure on education etc) and other aspects of education, including international dimensions in the curriculum, multiculturalism, school effectiveness and outcomes and globalisation. I have focused on the following three broad interlinked themes:

- The shifts in methodological approaches in education policy research, including issues arising from comparative education research.
- Central issues and shifts in focus in education and policy.
- Structural changes in education and policy.

3. GLOBAL TRENDS

3.1 *Revolutionary change*

The early 1990s were defined as a ‘revolutionary era’, marking the collapse of totalitarian regimes in the USSR and its client states. Mitter (1993) in ‘Education, Democracy and Development in a Period of Revolutionary Change’, uses democracy and humanism to reconsider policy shifts on the global arena. He finds that in many countries the notion of ‘democracy’ has eroded, leading to ‘nationalism, ethnocentrism and racism’ and that young adults react with

‘indifference, frustration, cynicism, aggressiveness or voluntary dropout’ (pp. 464-465). He believes that there is a need for a radical policy shift to address global problems, which include environmental issues and ethnic/racial conflict:

The recent World Conference in Rio de Janeiro drastically underlined the need for a radical reconsideration of strategies and policies in the area of environmental protection . . . in many cases education has entered, or has been forced into, unholy alliances with fanatical and violent outbursts of nationalism and racism (pp. 470-471).

3.2 *OECD Education and Policy Analysis: Education and Skills*

Education policy issues raised recently by Barber (2000) in his keynote address ‘The Evidence of Things not Seen: Reconceptualising Public Education’ at the OECD/Netherlands Rotterdam International Conference on Schooling for Tomorrow (see CERI website at www.oecd.org/cer) include the five ‘strategic challenges’ and four ‘deliverable goals’:

Strategic challenges

- reconceptualising teaching
- creating high autonomy/high performance
- building capacity and managing knowledge
- establishing new partnerships
- reinventing the role of government

Deliverable goals

- achieving universally high standards
- narrowing the achievement gap
- unlocking individualisation
- promoting education with character

These newly constructed imperatives in educational policy could well operate as a global ‘master narrative’ – playing a hegemonic role within the framework of economic, political and cultural hybrids of globalisation (see also Green, 1997; Green, 1998; Samoff, 1992; Zajda, 2003). Samoff (1992) criticised the ‘school effectiveness’ paradigm on the grounds that it was a new form of modernisation theory. The hegemonic role of ‘cultural essentialism’ in legitimating global economic arrangements (e.g., structural adjustment policies, or SAP) is also questioned.

4. POLICY AND EDUCATION: COMPETING VIEWS

As concepts, *policy* and *policy-making* involve certain conceptual and epistemological difficulties. As one 1976 *IRE* article noted, these result from the various definitions of the term ‘policy’, ranging from the ‘manifest actions of systems’ to a more ‘behavioural perspective’ of policies (Coombs & Luschen, 1976, pp. 133-135). It could also be argued that these difficulties partly stem from the distinction between the two concepts that developed during the nineteenth century,

replacing the earlier inclusive Baconian view of policy as reason of the state. In turn, this dualism has given rise to a dichotomy between *policy* and *policy implementation*, which has tended to lead to a search for explanations of the differences between the promise of policies and the actual experience of their implementation.

Over the years educational researchers have sought explanations for such differences between educational policy and its implementation (Stellwag, 1957; Brodbelt, 1965; Psacharopoulos, 1989). In a 1957 article, 'Problems and Trends in Dutch Education', Stellwag discussed the way the implementation of educational ideals met with 'concrete obstacles', despite the 'firmly established cultural and academic tradition of high standards' found in The Netherlands and the 'exemplary' legislative activity of the Ministry of Education (p. 54). In a 1965 article 'Educational ideals and practice in a comparative perspective' Brodbelt (1965), uses a comparative method to propose that only when 'myth and fact' in a nation's policy goals agree, has it 'reached its ideal system of education'. He illustrates his hypothesis by referring to the USA's failure to reach its ideal of universal education up to age eighteen (pp. 144-145).

In early articles the idea of *policy* in education tended to be equated with *planning*. The term *policy* does not appear in the title of an article until 1976. Nevertheless, many articles had as their central focus the area now referred to as 'policy'. Although 'policy' is mentioned in earlier articles, it is often interchanged with the terms 'planning' and reform'. As Psacharopoulos later confirmed (1989):

'. . . educational policy' is perhaps the contemporary equivalent of what twenty years ago was known as 'educational planning'. Whatever it is, and no matter how many other disguises it takes (such as 'educational reform'), practically every country in the world has at one time or another proclaimed an intention or made a decision that would affect some aspect of schooling in society (p. 180).

5. NEW INTERNATIONAL ECONOMIC ORDER

Greater equality in the distribution of incomes, both nationally and internationally were the key ideas of the New International Economic Order (NIEO) during the mid 1970s and the early 1980s. Proposals for a New International Economic Order (NIEO) were advanced by developing countries, and were the focus of the 1964 Geneva Conference on World Trade and Development. They were a set of policy proposals for changing the-then international economic order, developed in the background document *Towards a New Trade Policy and Development* for that meeting (Johnson, 1976). These policy proposals were discussed at a summit meeting of the non-aligned movement in 1973. According to Looney (1999), the origins of the NIEO can be traced back to the Havana Conference in 1948 and "stem from economic and political tensions that had been building between the developing and developed nations" (Looney, 1999).

Emmerij (1982) believes that since a basic requirement of the NIEO is the 'international redistribution of income' education at the policy level should reflect

national efforts of a more equal income redistribution and seek to diminish the gap between the 'world of work' and the 'world of school':

One of the main objectives of educational policy in developing countries should be to inter-relate more closely the world of work and the world of school in order to bring individual aspirations into closer harmony with the actual opportunities offered by the environment. This is one example of a change in educational policy that would diminish the gap between that policy and labour-market and employment policies (pp. 442-443).

5.1 *The New Economics of Planning Policy*

Another significant policy shift was due to the changing discourse of the economics of education. If in the 1960s and the 1970s the neoclassical economic theory, based, among other things, on the concept of investment in *human capital* (first introduced by Schultz in 1961, and later developed by Becker, in his *Human Capital*, 1975), influenced educational policy makers, then in the 1980s *microeconomic* analysis was replacing macroeconomic techniques. It was the perceived failure of the neoclassical economic model to deal with 'realities' in the education market and its inability to offer effective policy recommendations that prompted policy makers to focus their attention on the labour demand side of the 'education-earnings equation'. As Kraft and Nakib (1991) explain:

Cost-benefit analysis, input-output analysis, internal rate of return analysis...are more pertinent to decision making and policy formulation than macroeconomic estimate...Therefore the exclusive use of neoclassical economic theory in the formulation of educational plans and politics is simply misguided... (pp. 308-315).

The authors argue that there should be more emphasis on the 'socialisation' function of education, and on the 'micro' workings of labour markets as they relate to human capital theory and education. Accordingly, policy makers should concentrate on providing the optimal economic and social conditions that would work as incentives for future human capital needs.

6. EDUCATION AND POLICY: PARADIGM SHIFTS

Several major paradigm shifts in the methodology employed occurred between 1955 and 2001. Evidence from a survey of the articles published indicates that these changes did not signal a complete break with approaches used earlier. Rather, their advent promoted a gradual refining of the tools and skills used in the treatment of policy, largely in response to a growing recognition of the complexity of the education and policy issues involved and a growing awareness of the need to adapt to changing conditions and needs.

As Mitter (1997) reminds us in 'Challenges to comparative education: Between retrospect and expectation', the notion of *paradigms* refers to the 'interrelationship

between thematic areas and corresponding key concepts, and to theoretical approaches'. He also suggests that shifts in paradigms have been in response to certain perceived conditions and needs, be they political or economic: '... these paradigms mirror specific interrelations between sociopolitical trends and research priorities' (p. 405).

One of the major paradigm shifts occurred in the early 1970s, leading to a questioning of the 'value-free' empirical research in education. Reflecting the epistemological debate characterised by the dichotomy between two main research paradigms – empirical/quantitative versus interpretive/qualitative research, which preoccupied the social sciences in the 1960s, writers began to pay more attention to the issue of *qualitative* versus *quantitative* research. Until then, given its central theme, the area of policy and education, in particular, had been receptive to the ideas of *policy science*, which emerged in the early fifties. Lerner and Lasswell's (1951) influential work, *The Policy Sciences* had argued that policy analysis is a unique scientific discipline. It contained two dimensions: a) the science of the policy process and b) the use of science in the formulation of various policies. In education and policy, in particular, it spawned research into the science of the policy process (Mitchell, 1985, p. 30).

However, by the seventies some authors argued, that the 'value-free' connotation of 'science' had led to 'policy' sometimes being perceived as an attempt to produce 'value-free' research, so that 'any projective theory for the action of systems or individuals was discarded as teleological' (Coombs & Luschen, 1976, p. 134). In their 1976 article, which argues for a move beyond the emphasis on 'interrelationships between variables observed in the present situation', Coombs and Luschen propose that in order to better understand the performance of an educational system, the total system needs to be analysed:

The output of educational systems can be meaningfully analyzed and compared only in relation to other elements of the system, such as educational goals, cost, demands, and societal needs.

They go on to argue that as 'discontent with system performance is frequently a perceived lack of effectiveness, efficiency, responsiveness, or fidelity' then the system should be analyzed in terms of these four constructs (p. 149).

Dalin (1970), in 'Planning for Change in Education: Qualitative Aspects of Educational Planning' argues for the need to understand the *qualitative* nature of 'process of change in education': 'The planner has to ask qualitative questions about humans like "Why do we change?", "where do we go?", "Whom do we serve?"' (p. 437).

The debate over this paradigm shift reached its height in the 1980s. In 'Theory, Politics, and Experiment in Educational Research Methodology', Walker & Evers (1986) are critical of what they see as a still continuing empirical domination in research. They suggest an alternative paradigm that incorporates an understanding of the epistemologies of the 'subjects' of any education research into the actual research design:

... the process of theorising must include theoretical activity on the part of those traditionally deemed subjects. In inquiring into their social reality, they may well reflect

upon and experiment with their actions within their social reality. This may lead to changes in that reality quite as dramatic as those introduced by traditional experimenters (p. 385).

Further shifts in methodology are debated in the 1990s. The paradigm shift in the social sciences from structuralism to post-structuralism and postmodernism are also found expression in various articles. In discussing an alternative paradigm in postmodern society, Aviram (1996) proposes a radical shift in educational paradigm from the 'anachronistic' nature of the prevailing paradigm based on the 'puzzle-solving' approach to the 'interdisciplinary search' for connections:

It requires a leap from the 'puzzle-solving' approach dominant today in educational thought, which focuses on specific disciplinary treatment of specific problems, to a macro-level systemic approach which seeks out connections among specific problems and between these problems . . . this leap would entail the interdisciplinary search for possible links . . . the quest for an alternative paradigm must begin with the questions: Is it possible to determine state-wide goals in post-modern democratic society? If so, what are they? (pp. 435-438).

In 1997, the concept of 'postmodernity in comparative education' appears in the title of a special issue 'Tradition, Modernity and Postmodernity in Comparative Education', guest-edited by Masemann and Welch, 43(5-6). Here, Mitter (1997) sees the change of paradigms move from the 'classical' historical research and the investigations of the national systems, to intercultural education in multicultural societies (and the interrelation between universalism and cultural pluralism) and finally to the '*post-modern* revolt against the predominant theories of modernity' which defined comparative education in the past. He goes on to caution that 'current trends of economic, technological and scientific globalisation and the counter current revival of the awareness of cultural diversity' have created new imperatives and consequences for education. In terms of present and future 'universalism and cultural pluralism', a fruitful balance, Mitter argues, must be found 'between the messages of world system theory, and the theories which regard cultural diversity to be a permanent formation of human history' (pp. 407-410).

Young (1997), on the other hand, rejects the extremes of 'postmodern relativism' and 'universalism' in comparative education and proposes a new *praxis* of 'intercultural studies' based on the idea of 'progressive conversations that cherish both difference and common ground, both the relative and the universal' (pp. 497-504).

7. CENTRAL ISSUES IN EDUCATION PLANNING AND POLICY

Although in broad terms the expansion, change, and reform of education characterised the research published between 1955 and 2001, in various decades certain priorities in education and policy prevailed. Fernig (1979, p. 14) in his review of trends in education in a special review issue 'Twenty-Five Years of Educational Practice and theory: 1955-1979' (in volume 25, 2-3), provides a very

useful policy change assessment in Europe and elsewhere between the 1950s and 1960s:

Around 1952-54, the major concern of educational policies lay with internal or with social issues: internal, in the sense that structural reforms of education were in the forefront of the debate, social in that democratisation was the goal sought...ensuring a better articulation of primary and secondary schooling . . .

The reform movement in Europe continued through the sixties but the importance of social and economic factors for education became more visibly recognised in public policies during that decade...The extent to which education systems succeeded in palliating social and economic inequalities may be questioned . . . (p. 13).

The quantitative aspect of education and policy between 1955-1979 was also observed by Gillette (1979) in the same issue, who wrote:

'More is better' – at the risk of retrospective oversimplification, one can suggest that this could well have been the motto of educational policy-makers and practitioners 25 years ago. In a Euro-centric world just emerging from post-war reconstruction, their central concern was to provide more people with more of the already existing kinds of education. In terms of aspiration and intention, change meant linear growth (p. 142).

One example of influential policy research is the evidence of the enrolment data collected during the 1960s. These descriptive reports of enrolment patterns, in the context of 'human capital' theories, were a factor in the impressive expansion of basic education around the globe.

In the Sudan, for instance, there was a five-year plan in 1960 for educational reorganisation, including an increase in educational spending:

Among the new measures may be cited an increased share for education in the national budget. This share is now 13.5 per cent and it should be possible to raise it to 15, 18, or even 20 per cent. A second measure might be sharing to a greater extent than at present the responsibility for primary education with the local councils and municipalities . . . (Akrawi, 1960, p. 280)

In Yugoslavia, Crvenkovski (1961) notes a significant educational expansion, compared with the pre-war Yugoslavia:

Compulsory four-year education did not cover the whole territory of Yugoslavia. In some parts of the country illiteracy went beyond 75% . . . The expansion of the school system in the last ten years can be seen from the following . . . In the school year 1960-61, 84.3% children of school age attended elementary school (pp. 394-5).

The quantitative view of educational growth continued to be a major issue in education and policy during the 1950s, the 1960s, and the 1970s. The shift to qualitative indicators of education and policy outcomes, as we shall see, is a characteristic feature of the policy discourse during the 1980s and the 1990s.

7.1 *Educational planning as a concept*

During the 1960s educational planning emerged as a 'major activity' in education and policy. In 1964 the concept of *educational planning* appeared for the first time in the title of the article 'Educational Planning within the Framework of

Economic Planning' (Ewers, 1964). Here the shift is away from the earlier linear approach to expansion in education in terms of numbers to the economic view of educational planning as an *investment* and *consumption*. The 'new things' about educational planning as it was conceived in the 1960s compared to the past were summarised by Coombs (1964) thus:

For one, it takes a much broader view, embracing a nation's entire educational establishment . . . Also new is the conscious effort to make education a major force and an integral part of economic and social development. Thus, educational planning, seen in this broader frame, embraces both the internal affairs of education and its external relationship to the rest of society and the economy (p. 143).

In examining some operational problems arising in educational planning during the 1960s Ewers (1964) proposes a number of strategies, which include:

The educational planner is now required to ensure that the system he has planned will attract sufficient and suitable students at all levels. He will need to examine the present preferences of students and to identify the types of incentives which may be needed to bring about whatever changes are necessary in those patterns...Educational history would indicate that educational preferences tend to adjust themselves to the economic realities with time (p. 138).

Educational reforms were launched under the 'double banner of equalisation of educational opportunities and economic growth' (Husen 1979: 212). Educational planning was then, unlike in the Soviet Union, something new in the West. By the early 1960s there was what Weiler (1987) has referred to as a 'planning euphoria':

Yet the basic assumptions, upon which educational planning of the early 1960s was founded, the human capital theory...were challenged. Preoccupations with economic growth led to neglect of the qualitative aspects of educational planning (Husen, 1979, p. 213).

At the policy level, the role of planning in bringing about education reform becomes the key preoccupation (Husen, 1979, p. 213). National development plans (eg. five-year plans) became the standard model of education and policy planning.

7.2 *Shift to qualitative view of total process-planning model 1970s*

If the 1950s and the 1960s were characterised by traditional linear approaches to 'step planning' models, then in the early 1970s there is a shift to a more qualitative view of a 'total process-planning' model in education and policy.

Winn (1971), who elaborates a total process-planning strategy based on a principle of social change that 'advocates wide-scale involvement in decision-making by those who will be most affected by the decisions' (p. 267). As he explains, total process-planning involves 'verification, construction, evaluation and reward' (p. 272). He argues that educational planning 'calls for the creation of influential organisations at state, local and notional levels' to promote and guide the process. He criticises the manner in which 'most planning remains fixated on a sequential approach'.

In 'Educational Planning in a Developing Country: the Sudan', Akrawi (1960) considers some administrative changes in policy related to the financing of education and the community role in governing schools:

The first category involves economies in the present methods of expenditure and changes of policy which would result in such economies...Among the new measures may be cited an increased share for education in the national budget...A second measure might be sharing to a greater extent than at present the responsibility for primary education with local councils and municipalities . . . (p. 280).

The negative impact of policy on indigenous population groups is examined critically in 1980 by McDowell in 'The Impact of the National Policy on Education on Indigenous Education in Nigeria', who explains that policy-makers do not recognise the contribution made by indigenous education and that recent changes may 'threaten' local communities:

Recent national educational policies do not recognise the contribution which indigenous education continues to make...The analysis also shows, however, that a too-rapid implementation of these new policies would place excessive and unrealistic demands on the schools and threaten the ability of non-school educational efforts to adjust to these changes (p. 51).

A notable shift in policy planning was in evidence in 1983, when the concept was used in part 2 of a special issue 'The Universalisation of Primary Education', guest-edited by Hugh Hawes. This demonstrated a change from an earlier 'numbers' approach to a more holistic conceptual model. Here planning is discussed within the parameters of national and international initiatives, the increasing significance of the relationship between 'macro and micro planning', and 'devolution of power' (Hawes 1983: 165) and the importance of the latter for the local communities:

Until communities can be trusted and supported to share in the responsibility of organising staffing and servicing their own schools...then the quantity and, more critically, the quality of primary education will suffer. Devolution of power is a step which centralised administrations are often unwilling to contemplate . . . (p. 165).

The shifts from the linear, quantitative approach with priority placed on enrolments, cost surveys to the more qualitative approach may have led to what some critics perceived as an identity crisis in educational and policy planning. This identity crisis in educational planning is first discussed in 1984 in 'The Identity Crisis in Educational Planning' (Recum, 1984), who challenges 'traditional and contemporary technical approaches' to educational planning, in view of the failure of educational expansion to produce the desired results:

The early 1960s marked the beginning of new departures in educational policy-making...Educational policies, however failed to achieve the goals expected of them...Modern educational planning, on the other hand, serves to bring about controlled change. At the same time, it is expected to bring more objectivity to educational policy-making process and to improve their effectiveness...(pp. 142-143).

The status of educational planning was also reviewed by Bray (1984) in 'What Crisis in Educational Planning? A Perspective from Papua and New Guinea. Bray, in contrast to Recum and other 'education in crisis' policy researchers, argues, from

a case study of a developing country, that there is no real crisis in educational planning unless the policy-makers set themselves unrealistic objectives:

. . . educational planning . . . still has quantitative and qualitative weaknesses and its impact needs strengthening, but it does not suffer from an identity crisis or lack of prestige. . . it may be suggested that educational planning need only suffer an identity crisis if it expected to achieve unreasonable objectives . . . (pp.434-436).

Psacharopoulos (1989) (as noted earlier in the article) in analysing the discrepancy between educational policy goals and outcomes in some African countries argued that the reason why reforms fail is that the 'intended policy was never implemented' and that policies were based on 'good will' rather than on 'research-proven cause-effect relationships':

The reason most educational policies are not implemented is that they are vaguely stated and that the financing implications are not always worked out. . . in order to avoid past pitfalls, the following conditions should be met in formulating educational policies. A policy statement should be concrete and feasible in terms of objectives . . . (pp. 179-193).

7.3 Education and Policy Outcomes

In respect of education policy priorities, the period between 1955-1979 has been characterised by growth, decentralisation and school-based innovations. In examining social change, education and policy, some authors suggested that there needed to be refocusing away from the narrow strategy of growth to a more comprehensive and 'flexible educational strategy', based on international cooperation, the 'rapidly expanding learning needs', and a 'growing financial squeeze' (Coombs, 1982, pp. 144-145). The new focus in education and policy would need to address the 'stubborn issue of inequalities'. Coombs argues that:

. . . structural changes, especially in developing countries, have tended to enlarge rather than reduce long-standing educational inequalities. . . Helping to rectify these gross disparities is clearly one of the central challenges to education policies in the 1980's . . . first, each country. . . is bound to require a more comprehensive, flexible, and innovative educational strategy – a strategy that takes account of the changing and expanding learning needs of all its people. . . Second. . . there will be greater need than ever before for increased international cooperation in education, taking many new and different forms (pp. 153-157).

One of the key indicators in the domain of official policy was the universalisation of primary education. Bray (1983), commenting on outcomes of the National Education Policy in Pakistan (1970) with regards to universal primary education, concluded that, given low enrolment rates (e.g., 11 percent of females were enrolled in schools in Baluchistan in 1978) Pakistan was unlikely to achieve its desired UPE policy by the end of the century:

. . . it seems extremely unlikely that by the end of the century Pakistan will even be approaching universal education. This is not to say that policy makers should not set goals and aspire to achieve them . . . (p. 177).

8. STRUCTURAL CHANGES IN EDUCATION AND POLICIES: REFORMS AND INNOVATIONS

The key issues which have defined and guided structural changes in education and policy were compulsory schooling, equity of access and equality of educational opportunity and the influence of home background on academic achievement (Husen, 1979, pp. 204-205). If the central issue in educational policy in Western Europe during the 1950s and the 1960s has been the provision of compulsory education for all children up to the age of 15-16 (Husen, 1979, p. 204), then for developing countries it is the provision of universal primary education.

8.1 *Universal primary education policy*

The concept of universal free and compulsory education was first proposed by Unesco in Geneva in 1951. Subsequently, the Karachi Plan (1960) of universal primary education was adopted:

This meeting drew up a Twenty Year Working plan for the implementation by 1980 of universal free and compulsory education of at least seven years' duration for all the Asian States (Rahman, 1962, p. 257).

The first article on modern primary education in India was Kabir's (1955) account of universal primary education:

It is a directive principle of the Constitution of India that universal, compulsory and free education must be provided for all children of six to fourteen within ten years of its promulgation. When we remember that on the eve of independence, existing facilities did not extend to even twenty-five percent of them, this directive must be recognised as revolutionary in import (p. 49).

In one article it was estimated in 1959 that of 860 million children and youth of the "school age group" of 5 to 19 years during the 1950s only 30 out of 100 attended primary school, 7 were in secondary and postsecondary schools, and 63 (nearly 2 in 3) were not in school or 'have never been to any school at all' (Orata, 1959, p. 10):

In many developing school systems, education is often the story of drop-outs . . . Thousands upon thousands of children enrol in the first grade, but the majority do not reach the third or fourth grade, not to mention the sixth, which has been found to be the optimum grade for functional literacy (p. 10).

Education policy outcomes in Egypt are discussed by Harby and Affiri (1958):

The primary school has become an independent institution, it provides a total programme of common education for the great mass of children, and it is open to all without charge (p. 423).

In Uganda many primary schools were found in rural areas, and both the location of schools and poor quality of teaching were the two significant factors which made it difficult to achieve compulsory primary education:

. . . The immediate policy is "to ensure a minimum of four years schooling within walking distance of the home of every child who wishes to go to school". This aim, too, has yet to be achieved (Macintosh, 1958, p. 461).

Universal primary education (UPE) was the focus of the *International Review of Education*, 29(2), 1983. Hawes (1983) believed that the political, economic and social factors associated with the introduction of UPE could generate new inequalities:

. . . there is a danger that the inequalities which universal education sought to narrow will in fact be widened. This happened in Latin America, is happening in Nigeria and may well happen in the Bangladesh and Pakistan (p. 129).

8.2 Equality and equity policy issues

One of the starting points for the educational inequality debate is found in Gal's (1957) discussion of the shortcomings of the educational reform in France arguing that reform had not cured the fundamental problems of the system:

The only real equality for the children of France is to be found at the level of the elementary school; from the age of 11 years the fate of our children is decided by socio-economic criteria . . . so very few pupils from lower class families gain admission to the higher branches of education (less than 3% of the children of workers; 4% of the children of peasant families) . . . the opportunities for French children to obtain secondary education, and through that higher education, vary according to the child's social origin (pp. 470-473).

Inequalities in education, due to social, cultural, economic and cognitive factors, were already discussed in the *IRE* in the 1950s. Equalising educational opportunities was the focus of Kandel's (1957) opening article in volume 3 of *IRE* when he notes that although the provision of compulsory elementary education was the major issue in the past the demand for equality of opportunity required a new way of thinking:

...The demand for the provision of equality of educational opportunity required a social and political awakening to a realisation of the worth and dignity of the individual as a citizen and a recognition of the economic value of a worker educated beyond the mere stage of literacy (pp. 1-2).

Other related issues are raised by Blomqvist (1957) in 'Some Social Factors and School Failure' when he argues that children's academic performance is linked to economic and social factors, including environment and the home background:

Most studies have produced results that show that pupils from lower social strata fail more often than those from higher...A low income seems to count for relatively little in comparison with the lack of cultural standard, cultural motivation and educational tradition (pp. 166-171).

Later, as we see, the topic of equality and equity had become 'another overriding policy issue' (Husen, 1980, p. 204). In fact, equality of educational opportunity became the key issue in education and policy research. The shift in policy was from the conservatives' notion of the 'talent reserve' – to enable young people from lower social strata to get access to education, to the idea of equal access to education for all. The radical writers challenged the concept of 'inherited' ability altogether, claiming that it reflected a bourgeois belief that inherited capabilities and not social class, determine life chances.

In Ceylon, Jayasuriya (1962) provides a historical setting for inequalities in education, which is attributed to the dual structure of schooling:

The absence of a genuine equality of opportunity on account of the existence of "two types of schools – one attended mainly by those who can afford to pay fees, and the other attended by those whose means do not permit them to do so" (p. 293).

Educational inequalities based on race and ethnicity interested a number of scholars. The problems connected with the education of black Americans were highlighted by Roucek (1964):

...The fact remains that the problem of the American Negro looms large in the United States, and America's most enduring moral, social and political issues have been shaped, or at least influenced by mere presence – and they remain unsolved (p. 162).

In the 1960s wealth began to replace race as the key issue in many equity studies. Malkova, (1965) is critical of American high schools perpetuating educational inequality by their use of I.Q. tests for student placement, thus:

... the theory of mental giftedness has been exerting an important influence upon the American school...Investigations have shown the I.Q. to be connected with the children's socio-economic environment, and it is children of poor families that are usually classed among the "incapable" ones...these children, being classed as "incapable," are given a watered-down course of study...(p. 259).

Equality of opportunity and improvement of *standards* is the theme of 'Equality, Quality and Quantity: The Elusive Triangle in Indian Education'. Here, Naik (1979) reviews the dilemma faced by educational policy makers in India who, faced with limited financial resources, high adult illiteracy rates, and high drop-outs rates, attempt to bring about equality of educational opportunity:

...our worst achievements are in the field of universal retention. Of every hundred children enrolled, only about 30 reach Grade V and only about 25 reach Grade VIII. What is even worse, these high rates of wastage have remained almost unchanged over the last 30 years...it [the education system JZ] mainly serves the upper 30 per cent of the population who monopolise 70 per cent of the places in secondary education and 80 per cent of the places in higher education (pp. 53-55).

More recently Jennings (2000), in evaluating the impact of compulsory schooling on literacy rates in Guyana, among youth aged 14-25, finds that only 11% show a 'high level of functional literacy':

The study has shown that in a country which has the longest history of compulsory primary education in the English-speaking Caribbean, only about 11 per cent of its young people between the ages of 14-25 are functionally literate . . . there is a clear need for literacy programmes for those young people whose literacy skills the school system has failed to develop to a level at which they can function effectively in the society (p. 113).

The review of education and development in Latin America (1950-1975) by Rama and Tedesco (1979) offer a rare insight into the conservative role played by education, as the mechanism for reproducing the dominant cultural models and ideologies:

It also maintains, through that process, the structure of social differentiation of a stratified society. It is known, in a stratified society the labour market becomes the instance for marinating the hierarchic structure of inequalities (p. 74).

8.3 *The Crisis of Quality in Education*

The issue of the 'crisis' of educational quality is also addressed by Heyneman (1993), who argues that because 'we have been so busy arguing over differing research paradigms' we have not paid sufficient attention to 'common professional goals'. For Heyneman it is time to return to 'first principle' in educational policy:

. . . it is time to ask why the state should support public schooling at all...How good in fact are our schools? How well prepared are our young people? How much would it cost to improve educational results? How well are schools being managed? How are our schools in comparison to schools elsewhere? (pp. 512-513).

Heyneman concentrates his analysis on the role of the 'efficiency' criterion in solving the global crisis of educational quality.

A more critical view of global standards of quality is offered by Vedder (1994) in 'Global Measurement of the Quality of Education: A Help to Developing Countries'. He argues that global measures of quality in the context of international comparisons are 'detrimental' to the quality of education, especially in developing countries (p. 5). He is critical of IEA assessment studies, based on the commonality of curricula, which is a pedagogical hybrid of 'a Westernised global curricula' and 'standardisation', and argues that policy-makers, who represent 'dominant interest groups' in a given country may use or abuse global measures as a means of maintaining a disciplinary power over teachers and keeping 'control of the curriculum' (pp. 14-15).

8.4 *Global marketisation of education and social stratification*

The Western-driven model of excellence, quality and success is defining the teleological goal of the 'marketisation' of education around the world. This has some serious implications for educational policy. The encouragement of greater school autonomy and competition among schools may exacerbate, as Tan (1998) argues, not only the 'disparities between schools in terms of educational outcomes but also social inequalities' (p. 47). In short, increasing competition among schools and parental choice is a reinforcement of social stratification:

The intense inter-school competition and the introduction of annual school league tables has led schools to become increasingly academically selective in a bid to maintain or improve their ranking positions. There is a growing stratification of schools...there is a danger that marketisation of education will intensify social stratification as well.

Although the government is aware of the potential political fallout from the public controversy over social inequalities, it shows no sign of reversing the trend

towards the marketisation of education. If anything it is likely to further encourage competition among schools (pp. 50-60).

9. CRITICAL EVALUATION OF EDUCATION POLICY

In reviewing the nature of issues, ideological shifts and the notion of change in education and policy between 1955 and 2001 dealt with in articles published, we can observe the following shifts in education and policy:

1. The 1950s witnessed population growth and economic expansion and with it the interest in 'educational planning', forcing authorities to gather information to describe accurately the state of education in different countries. UNESCO's role becomes significant in this data-collection process. The major concern of educational policies was with 'social issues'. One of the additional issues in education during the 1950s was a growing discrepancy between rhetoric and reality of education policies.
2. At the beginning of the 1960s education and policy 'rode on a wave of optimism' and was considered to be a major instrument for 'social change and progress' (Husen, 1980, p. 212). In the 1960s education and policy entered an era of 'scientifically controlled' innovation. *Educational planning* emerged as a 'major activity' and can be cited as a good example of the 'breakthrough in the 1960s of the general interdisciplinary approach in conceptualising and tackling educational problems' (pp. 212-213). Educational planning becomes increasingly relevant to the economic link between education and development and the importance of economic and social factors: deciding on priorities and the allocation of resources.
3. During the early 1970s the 'reform period' gains in prominence, (Bowen, 1980, p. 194). This was an era of serious critical analysis of education and policy, typified by a rejection of capitalism, and the quest for better alternative to the conservative tradition. At the same time, a world-wide demand for greater expenditure on education continued.
4. In the 1980s educational planning increasingly emphasizes the significance of the relationship between *macro* and *micro* planning, the 'tensions between politicians and planners' and the complexity of the 'logistics of UPE' (Hawes, 1983, p.123).
5. The OECD study on sustainable flexibility (OECD, 1997) suggests that the new information and knowledge-based economy of the 21st Century will affect significantly the nature of work, which in turn will re-define educational planning and the education process.

Has there been any visible shift in paradigms, ideology and issues depicted in various articles? With reference to the role of the state, ideology and politico-economic imperatives in education and policy we can make the following four tentative conclusions:

In examining the shifts and the way conceptual thinking has changed in education and policy during the last five decades we can conclude:

1. The major paradigm shift of the early 1970s between positivism (empirical/quantitative research) and anti-positivism (non-empirical/qualitative research) began to question THE idea of 'value-free' empirical research and the scientific dominance of empiricism. This paradigm shift reached its heights in the 1980s, as illustrated by post-structuralist and post-modernist education and policy articles. Described as a '*postmodernist revolt*' (Mitter, 1997, p. 407) against the dominating theories of the Enlightenment and modernity, such a paradigm shift in policy directions challenged the metanarratives in education and policy, the 'regime of truth', the disciplinary society, and promised to empower the learner, by re-affirming the centrality of the learner in the curriculum, and diversity of learner needs.
2. In educational planning and policy reforms the shift has been from the 'linear' model of expansion in education, based on the 'more is better' metaphor (Gillette, 1979, p. 142), and the human capital theory, which had dominated policy-makers and reforms during the 1950s and the 1960s to the qualitative (Husen, 1980, p. 213), more holistic (Hawes, 1983, p. 165), 'global security' focused (Williams, 2000, p. 187), and 'integrative' (Hoppers, 2000, p. 24) aspects of policy directions and policy reforms.
3. The key policy issues as reflected in education and policy reforms during the last five decades could be described as restatement of an egalitarian-inspired imperative – the equality objective – ensuring that the equality and quality of educational opportunities enjoyed only by the best-served few are available to all. Specifically, the central policy issues dealt with the provision of compulsory education for all children (including the changing nature of universal primary education, in developing countries), equity, school choice, and the influence of the home background on academic achievement (eg., Kabir, 1955, p. 49; Jayasuriya, 1962, p. 293; Naik, 1979, p. 53; Husen, 1979, p. 204; Coombs, 1982, p. 153; Bray, 1983, p. 177; Hirsch, 1995, p. 239).
Critical education and policy issues continue, by and large, to remain the same. The 'stubborn issue of inequality' (Coombs, 1982, p. 153), first examined in 1957 (Kandel, 1957, p. 2) is still with us (Jennings, 2000, p. 113; Zajda, 2003) and the prospect of widening inequalities in education, in part due to market-oriented schooling), and 'substantial tolerance on inequalities and exclusion' (OECD, 2001, p. 126; Aspin, Chapman, Hatton & Sawano 2003, p. xxiv) are more than real. In 1982 the critical issues in policy directions for the next two decades included:
 - new internal strategies (more comprehensive, flexible and innovative modes of learning) that took into account the changing and expanding learner needs,
 - overcoming 'unacceptable' socio-economic educational disparities and inequalities,
 - improving educational quality,
 - 'harmonising education and culture', and
 - 'international co-operation' in education and policy directions in each country (Coombs, 1982, p. 145-157).

The questions that arise from the ‘strategic challenge’ and ‘deliverable goals’ framework (Barber, 2000), and which are useful in delineating the policy challenges and the goals pursued, centre on the issue of equality, or egalitarianism, rather than meritocracy in education. Specifically, one can refer to the different cultural, economic and political environments, which affect the nature of schooling. Diversity and uniformity, with reference to equality of opportunity needs to be considered. Important equity questions are raised by current discourses on centralisation/decentralisation, diversity/uniformity and curriculum standardisation models. Assuming that we accept that there is a need for greater diversity of schooling, what is the extent of widening social inequality? Will the spirit of egalitarian ethos of more equal and equitable outcomes prevail, or will it drown in the ocean of global inequality? The erosion of the earlier model of the welfare state and the global spread of the present conservative neoliberal models, characterised by ‘state withdrawal, privatisation, and localisation’ (Astiz, Wiseman & Baker, 2002, p. 69) may have legitimated the ‘often pervasive and exploitative’ dimension of the capital-labour-market organisational system. This economic aspect of globalisation, coupled with institutional and ideological spheres tends to force nations into a tighter connection to a global market (Astiz, Wiseman & Baker, 2002, p. 67).

10. CONCLUSION

The above chapter shows that critical policy issues and options, in terms of recently defined strategic challenge and deliverable goals, have shifted from the human capital and supply-determined models of economic planning based on enrolments, inputs and outputs, and the market forces, to a multi-dimensional and multilevel frameworks of policy analysis, which identify the impact of supra-national, national and sub-national forces on education and society. The pragmatic value of such paradigm shifts is that they address what Arnove & Torres (1999) call the dialectic of the global and the local and the unequal distribution of socially valued commodities.

However, the principle of providing quality education for all, in view of the presently widening gap of wealth, power, income, SES disadvantage and inequity between the rich and the poor locally and globally continues to remain a myth. To solve the inequalities requires an ideological and radical policy shift in current models of governance, and an authentic and equal partnership between the state, multi-national corporations, policy-makers and educators, all working together towards the eradication of inequality and poverty both locally and globally – for the common good of humanity.

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