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Comparing Policies

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The word policy is commonly used in government documents, academic writings and daily conversations. However, the nature of policy and the ways in which it can be researched, interpreted and produced are open to debate. The literature that might assist in this matter is diverse, divided and to some extent inconclusive. In the words of Ball (1997, p.15), it contains "theoretical uncertainties"; and answers to some questions raise other questions.

Nevertheless, it is important to address these questions, in part because debates about educational policy in many parts of the world are becoming more intense. An increasing duality has become evident. On the one hand, the way policy is made is highly contextualised and its implementation even more context-dependent; and on the other hand, policy travels globally and has profound impact in locations far removed from its origins. In such circumstances, comparative research on education policy is growing in relevance and interest.

This chapter discusses theoretical and methodological issues in comparative analysis of education policies. It begins with a description of the international policy context, and then moves to debates about the definitions of policy. The chapter also illustrates ways in which education policies can be compared.

The Changing International Policy Environment

Policy does not exist in isolation. Since World War II, dramatic changes in the international policy environment have had a direct impact on how social policies are made, implemented and researched. The changes have of course been different in different parts of the world. The remarks that follow apply particularly to industrialised countries.

The first change has been economic. World War II was followed by an unprecedented boom during which many societies experienced strong economic growth for nearly 30 years. The period ended in the mid-1970s and was succeeded by slow growth or stagnation. During times of slow growth, citizens become increasingly reluctant to pay taxes. Since the late 1970s, first the United States and then some other English-speaking countries have seen a series of low-tax movements and tax rebellions. Within such a climate, politicians have tried to reduce spending on public services.

The second change has been demographic, which significantly changed the composition of populations in the major wealthy societies. One demographic phe-

nomenon has been the baby-boom generation – people born between 1946 and 1964. As babies, as teens, and as young adults, this segment of the population had enormous impact on their nations. With the baby boomers reaching their 50s and starting to think about retirement, political leaders have needed to think about health-care costs. Significant funds, both private and public, will have to be invested in the aging populations over the next 25 years, thereby reducing the money available for other public services.

The third change has been ideological. Over the last 20 years, a major shift in political ideas occurred first in the United States and the United Kingdom, then in other parts of the English-speaking world, and then in many other locations. In general, the focus of politics shifted from equality to excellence, accountability, and choice. Business leaders often advance these ideas in policy debates. They sometimes sound as if they discern no difference between public and private institutions, and they criticise public services for their alleged inefficiency and insensitivity to the market. The ideologies of both the business community and the Religious Right lead them to be sceptical of government initiatives. Public services are a part of the government and are therefore automatically defined as part of the problem.

The fourth change has been the nation-state framework. Globalisation has blurred the boundaries between nations and civilisations. The current global world system is different from the traditional international world system in which nation- states were the most important and powerful players. Nation-states can no longer tightly control the global flow of people, information and capital. Increasingly, trans-national events are out of the control of nation-states, which therefore have less power. Some forms of traditional government politics can only operate well within the nation-state framework. National policies have demonstrated increasing limitations, while trans-national forces and players have received increasing prominence.

The fifth change has been increased individualisation, which threatens public agencies and politics. The post-nation-state era is confronted with both a decline of political forces and the opulence of individualisation. The former is caused by global capitalism and paves the way for further individualism, while the latter leads to further decline of political forces. Nowadays, there are neither clear identities of political parties and nation-states, nor universal social trust. Within this context, traditional government political structures are losing their capacity for integration.

The final change has been a sense of uncertainty and lack of trust in political decision-makers. In recent decades, people, particularly in the West, have gradually abandoned their strong belief in human rationality and the notion that knowledge is power or strength. Instead, people increasingly recognise uncertainties. Some even believe that human knowledge is a disastrous power. This sense of uncertainty leads to scepticism towards technocrats and political decision-makers.

Understanding Policy: Two Perspectives

The term policy derives from political science, which is itself a deeply divided discipline (Almond 1990). Partly because of philosophical conflicts over the nature of individuals and society, people have different understandings of the meanings of power and the proper roles of government. Their perceptions of the meanings of policy, policy-making and implementation differ accordingly (Fowler 2000).

In the literature, and also in practice, there is no single recipe for policy analysis (Taylor et al. 1997, p.36). Rather, various approaches have been adopted in analysing policies according to the analysts' different purposes. Understanding what policy is largely determines ways of doing policy analysis (Ball 1997, p.15). In order to compare policies, it is important to understand what policies are. Although much literature attempts to define policy, it is frequently recognised that policy is a complex concept and that achieving a definition is not easy. Cunningham (1963, p.229) once suggested that policy was like an elephant – you recognise one when you see it, but it is somewhat difficult to define. This elephant metaphor also applies to the Indian fable – Six Blind Men and an Elephant, showing the direct link between a philosophical stance and the definition of policy. Hogwood and Gunn (1984) identified nine possible contexts in which the word policy was used: a label for a field of activity, an expression of general purpose or desired a state of affairs, specific proposals, decisions of government, formal authorisation, theory or model, programme, output, and outcome. They proposed a tenth category of "policy as process" (p.19).

Policy can cover a very broad arena and can be understood and used in various ways, including plans, decisions, documents and proposals. In addition to written forms, policy can include actions, practices and even the inactions of governments. The most popular of these definitions, amongst policy researchers and the public at large, are those that define policy as documents. Expanding the broad identification of policy documents, these representations can take various forms at different levels: most obviously official legal texts and policy documents; formally and informally produced commentaries which offer to make sense of the official texts; the speeches and public performances of relevant politicians and officials; and official videos (Bowe et al. 1992, pp.20-21).

Taylor et al. (1997) classify policies into distributive or re-distributive, symbolic or material, rational or incremental, substantial or procedural, regulatory or deregulatory, and top-down or bottom-up. Much depends on how allocation of resources or benefits is made, the extent of commitment to implementation, the existence or otherwise of prescriptive stages for the development of policy. Such classification helps to define policy, although parts may be rather arbitrary.

Another classification, although increasingly blurred, is between public and private policy. The public sector represents a group of institutions which rely on, or justify their activities in terms of, the authority of the state. The public sector is more exposed to political direction and scrutiny than the private sector. It is characterised by public accountability, which extends to the performance of all state functions, and is enforced in a variety of ways ranging from the administrative to the electoral. At least theoretically, the public sector is based on the principle of equality of treatment of citizens. The concepts of ownership of enterprise and profits have been traditionally missing from the public sector. Finally, the idea of a public sector embodies the principle that all public authority must only be used in the public interest. This contrasts with the scope for individuals and companies in the private sector to do anything that is not forbidden by the law to maximise their own advantage.

The focus of this chapter is on public education policy, which is produced by government or arms of government, for the benefit of the public. Public policy is usually collective and cannot be easily separated as economic, environmental and educational. It is now at the centre of major political struggles between those who see it only for its instrumental outcomes and those who see its potential for human emancipation.

As Dahrendorf (1959) explains, society has two faces: conflict, that is, conflicts of interest; and consensus, that is, value integration in society. Sociological theories can accordingly be classified into consensus and conflict perspectives (Jary & Jary 2000). Likewise, researchers have rational and conflict perspectives for viewing policy.

The rational perspective

The rational perspective, also referred as the traditional model of policy development and analysis, emphasises the technically best course of action to implement a decision or achieve a goal. Such a technology of decision making in the public sector enables governments to make the most cost-effective decisions. This positivist view believes in a value-neutral manner to avoid or simplify the political complexities. It largely ignores the issue of power and the way in which the state might exercise it. Its theoretical basis dates back to August Comte (1798-1857), who called sociology 'social physics' and insisted that the methods from natural sciences, including observation, experiment and comparison, should be used to study society.

In analysing decision-making processes, Simon (1960) proposed a rational policy production theory that was closely related to the stages of problem-solving first described by John Dewey (1910, p.3): "What is the problem? What are the alternatives? Which alternative is the best?" This method of making decisions involves selecting from the alternatives that "will lead to the most complete achievement of your goals" (Simon 1945, p.240). It entails the choice of the 'best' course of action from all possible options, achieved through a systematic and sequential process.

The rational perspective sees the policy process as a sequence of events that occurs when a political system considers different approaches to public problems, adopts one of them, tries it out, and evaluates it. It suggests that the policy process is orderly and rational. It reflects functionalist assumptions about the way society works: underpinned by a value consensus and the various institutions in society contribute to the ongoing stability of the whole. It conceptualises policy in distinct and linear phases: from policy development or formulation to implementation and evaluation

A version of the rational model in the political science context was described by Anderson (1984, p.26) as having the following sequential steps of the policy process: (1) problem formulation including what policy problem is, what makes it a public problem, and how it gets on the government agenda; (2) formulation including how the alternatives for dealing with the problem are developed, and who participates in policy formulation; (3) adoption including how a policy alternative is adopted or enacted, what requirements must be met, and who adopts policy; (4) implementation including what is done, if anything, to carry a policy into effect, and what impact this has on policy content; (5) evaluation including how the effectiveness or impact of a policy is measured, who evaluates policy, what the consequences of policy evaluation are, and what demands are for change or repeal.

In singling out 'policy as process' as their preferred definition, Hogwood and Gunn (1984, p.19) compared the nine usages of policy they identified to still photographs – the statement of an objective, the moment of decision, a Bill becomes an Act, and so on. They suggest the desirability of the equivalent of a film which will permit study of the unfolding over time of the complexities of the policy-making. They go on to prescribe a policy making framework and divide the process into nine stages: deciding to decide (issue search or agenda-setting); deciding how to decide (or issue filtration); issue definition; forecasting; setting objectives and priorities; options

analysis; policy implementation, monitoring, and control; evaluation and review; and policy maintenance, succession, or termination.

Although this account seems to provide a clear framework to understand and investigate policy processes and how policy is made, the rational model has met much criticism because it suggests that the policy process is more orderly, has clearly defined stages and is also more rational than it really is (Lindblom 1980; Ball 1990; Cibulka 1995; Taylor et al. 1997).

The idea of dividing the process into clearly defined stages encountered substantial criticism because each stage itself involved complex processes. Even in the first stage, agenda setting, different people with different values and interests have different ideas about what should be on the policy agenda, what the logic that informs the filtrating of the agenda is, who decides on the policy priority agenda, and how the decision is made and why. Therefore, decision-makers are not faced with concrete, clearly defined problems because the rational model neglects the political nature of decision making (Lindblom 1980).

Moreover, it is unrealistic to consider all possible alternatives and make a decision on which is the best option because there is always room for improvement. Furthermore, in reality some decisions are made arbitrarily and illogically. These analyses of the first two stages show that they are closely related to each other and that agreement among different people cannot be reached easily. Their many uncertainties and complexities mean that they are almost impossible to separate from each other.

As for the last stage of policy, while some policies may be purposely 'terminated' by other decisions or by new policies, the effects or the influences of terminated policies do not necessarily come to an abrupt end. Sometimes their influences can last for quite a long time, and some effects, once realised, are hard to reverse. Even new policies can be greatly influenced by or derived from old ones. Furthermore, the effects of some policies fade away for various reasons, even if their makers are reluctant to admit to this.

Intending to avoid the drawbacks of the rational model, Lindblom (1959) proposed an incremental approach to decision making. The major difference between an incremental approach and a rational approach is that the decision-maker considers only some of the alternatives for dealing with a problem, and for each alternative only a limited number of important consequences are evaluated. Lindblom argued that incrementalism was a good description of how decisions and policies were actually made. He claimed that one advantage of 'muddling through' was that serious mistakes could be avoided if only incremental changes were made because it was easier to reach agreement when dispute existed among various groups. Compared with a rational model, incrementalism is more realistic because it recognises the limitations of time, intelligence and other resources in policy making processes. Lindblom (1980) pointed out that the policy process was extremely complex, without beginning or end, and with uncertain boundaries.

The incremental approach has also met much criticism for being too conservative, helpless in dealing with crisis, and hence a barrier to innovation. Trying to avoid the weaknesses of rational and incremental models by combining the strongest features of the two, Etzioni (1967, p.389) put forward a new approach, a 'mixed-scanning'. His strategy was to include elements of both approaches by employing two cameras: a broad-angle camera that would cover all parts of the sky but not in great detail and a second one which would zero in on those areas revealed by the first camera to require

more detailed examination. This was decribed by Smith and May (1980) as the 'third' approach, providing policy-makers with both rational and incremental approaches in different situations. It seems logical, in practice it is not easy to decide which approach – rational or incremental – is most appropriate under specific situations.

Even if it is theoretically possible (but not justifiable) to separate the policy process into sequential stages, it is ill-advised to assume that in practice policy develops according to this staging advocated within a rational model, a process described by Ball (1990, p.3) as often "unscientific and irrational". The policy process is continuous, interrelated and interacted, not a mechanical one that can be divided into stages with distinct boundaries following orderly steps. The attempt to do so is inappropriate and unfeasible.

Some argue that policy is both product and process, making it ongoing and dynamic, and more complex, interactive and multi-layered than in rational models (Taylor et al*.* 1997; Wildavsky 1979). They suggest that policy processes accrue both prior to the production of a policy text and afterwards, through the stages of implementation and reinterpretation (Taylor et al. 1997, p.25). This means that the text of policy, often in the form of written documents, is by no means the end of policy making. The process of creating a final text is difficult enough. It is usually very hard to tell the specific reasons or intentions for initiating such a policy; and even if the reasons or intentions are clearly stated, they may not be the actual ones.

The research by Bowe et al. (1992) emphasised the importance of contexts, and showed that policy is different in different contexts. In the context of influence, policy can be understood as intentions, ideas, aims, purposes, objectives or plans; in the context of policy text production, policy can be written texts, products, documents and articles; and in the context of practice, policy can be actions, performances and activities. Indeed, policy can mean even more than these specific things, and involves various actions and processes. Bowe et al. argued that recognising policy as a process places it in continuous, interrelated and reciprocally-influenced contexts, which should also be taken into consideration in policy making and analysis. Policy is an outcome of the aggregate forces of all the three contexts. While each context is strongly related to process, the impact and effects of context are in practice different and unequal. For example, the influence from the context of practice is often not as strong as that from the context of influence. Such differences and inequalities of weight in policy making are derived from the nature of policy – an act of politics itself, something that has been well explained in a 'conflict' perspective for viewing policy.

The conflict perspective

Critical theorists take a conflict approach. They see society as consisting of competing groups with different values and access to power. According to them, policies do not emerge in a vacuum, but reflect compromises between the competing interests (Taylor et al. 1997, p.5). Thus, policy problems are too complex to be solved in simple technicist ways, and policy processes are interactive and multilayered. Critical theorists emphasise that the two words policy and politics came from the same root, and that policy necessarily involves politics. Here, politics, with a small 'p', is about imposition of one interest over another, not necessarily about political parties.

A conflict perspective emphasises that authority "invariably becomes the determining factor of systematic social conflicts" (Dahrendorf 1959, p.165). Conflict theorists highlight the role of power in maintaining social order. According to them,

various positions that individuals inhabit within society have different amounts of authority, and some positions have more power and authority than others. However, a person of authority in one setting does not necessarily hold the same amount of authority in other settings. A conflict of interest is latent at all times, and "the legitimacy of authority is always precarious" (Dahrendorf 1959, p.268). Society experiences continuous social conflict because it is composed of individuals, groups and institutions with distinctive and conflicting interests. Authority shifts constantly among different settings (Ritzer 1996). Policy is never static or permanent. It is valid only in certain contexts and within certain periods of time.

Fowler (2000) points out many similarities between policy processes and games as follows: both have rules and players; both are complex and often disorderly; both are played in many arenas and involve the use of power; and both can have winners and losers (see also Bourdieu & Wacquant 1992). While "fairness" is what the players pursue in real games as in the game of policy, "what is fair" is not always decided by all the players. Fair for some players may well be unfair to others. Policy is defined by the "rules of the game" (Offe 1985, p.106). But when we think about questions such as who makes the rules, how the rules are made, why the rules are made that way, and whether or not these rules are made fairly, it is natural to think about our individual values, interests and priorities.

The nature of policies is value laden, and thus highly political. As Ball (1990) insists, policies cannot be divorced from interests, from conflict, from domination or from justice. In reality most policies are developed in a more disjointed, less rational and more political fashion than might be expected. It is important to recognise the policy process as inherently political in character and involving compromises, trade-offs and settlements (Taylor et al. 1997). There are competing interests in the policy process, and policies represent compromises over struggles.

At the institutional level, the power relations of policy settlements are "systematically asymmetrical", that is, "different individuals or groups have a differential capacity to make a meaning stick" (Thompson 1984, p.132). Particular groups of people are institutionally endowed with power, while other groups are excluded or remain unable to access power. Due to the political nature of policy, "only certain influences and agendas are recognised as legitimate, only certain voices are heard" (Ball 1997, p.16). Policy is the outcome of conflict and struggle between interests in context.

Policy only represents the values of the interest group that possesses the authority in policy making, although it often presents itself as universal, generalised and even commonsensical. Its interests and influence are invariably partial (Gale & Densmore 2003, p.38). It then makes sense to represent policy as the authoritative allocation of values. As Prunty (1985, p.136) argues, this view of policy "draws our attention to the centrality of power and control in the concept of policy; and requires us to consider not only whose values are represented in policy, but also how these values have become institutionalised".

Adopting a conflict view, Ball (1990) has argued strongly that policy by no means stands for a consensus opinion of all social members. Policy making, he suggests, never follows a rational or logical sequence. Rather, policy is derived as the consequence of endless struggle and compromise between various interest groups, and eventually makes a symbol of the dominant values of the group with authority. The values do not float free of their social context, and it is therefore important to ask whose

values are validated in policy, and whose are not. Indeed, it would be both theoretically naïve and politically abhorrent to suggest that the policy process is democratic and that policy is produced through mutual agreement of elected representatives (Gale 2003, p.52). The conflict among different interest groups is the ever-lasting dynamic leading to change in society. The public decision-maker is usually confronted with a situation of value conflict rather than value agreement.

Bowe et al. (1992) illuminate context as an essential aspect of the policy process. They also stress that only certain groups of people have legitimate authority. They help to show the essence of policy without the disguise of the policy text, demonstrating that although policy texts are normally expressed in the language of general public good, they are often informed by the influence of dominant groups and echo their interests.

The research by Bowe et al. (1992) further reveals that interpretation of policy is a matter of struggle. Practitioners interpret policy with their own histories, experiences, values and purposes. Their responses to policy text are often constructed on the basis of "interpretations of interpretations" (Rizvi & Kemmis 1987, p.14). It is very hard to control or predict the effect of a policy and new possibilities and opportunities. This confirms the view expressed by conflict theorists that policy practitioners have unequal authority in different contexts. Legislators who have authority in the context of influence may lose (some of) their authority in the context of practice. The authority shifts from context to context, and this is why policy effects are often quite unexpected and different from policy intentions. The authority that practitioners have endows them with power to interpret policy according to their own understandings, which can be quite different and even opposite to policy initiators.

In brief, the conflict perspective sees policy making in complex societies as often unempirical and illogical, although policy makers almost always claim otherwise. This conflict perspective is consistent with critical policy analysis which aims to identify who is advantaged (and who is not) by new arrangements. There is a fundamental need to explore the values and assumptions that underlie education policy by asking questions such as who are the winners and losers, and how their values are institutionalised (Taylor et al. 1997, p.37).

Making Sense of Comparing Education Policy: Uses and Abuses

In a context of globalisation, the concept of policy borrowing has always been central to the work of comparative education researchers (Phillips & Ochs 2003). Global policy agendas are steering education research as a means of shaping socioeconomic development within countries. A growing body of literature has discussed the increasingly intensified cross-national travel of education policy. This literature is concerned with patterns in which knowledge about policies, administrative arrangements, institutions and ideas in one political setting is used in the development of policies, administrative arrangements, institutions and ideas in another political setting.

Contemporary changes in geopolitical relations combined with the implications of the intensification of globalisation have heightened the significance of such relationships to the extent that the very conceptualisation of problems in comparative and international research is in need of fundamental change (Crossley & Watson 2003, p.48). Globalisation provides a new empirical challenge as much as it does a new theoretical frame for comparative education.

A variety of uses and abuses of comparative education policy studies may be identified, despite the lack of a clear dividing line between them. Best uses and absolute abuses are two extremities of the same continuum. Uses of comparing education policy studies have their prerequisites. Without meeting these prerequisites, uses turn out to be abuses, which can easily be found in contemporary comparative studies in education policy. It is then highly necessary to make further classification in this aspect. The examples used here concentrate on the area of China education policy study in order to be more focused. In consideration of the length of this chapter, four major issues are addressed in the following section to make sense of comparing education policy. They are, however, by no means exclusive.

The all-important context

Context is of great importance to comparative research in education policy. Much can certainly be learned from comparisons with the work of others and from the international experience, but many distinguished comparativists have long pointed out that major problems lie in any simplistic transfer of educational policy and practice from one socio-cultural context to another. To cite Sir Michael Sadler's (1900, p.310) seminal lecture:

> We cannot wander at pleasure among the educational systems of the world, like a child strolling through a garden, and pick off a flower from one bush and some leaves from another, and then expect that if we stick what we have gathered into the soil at home, we shall have a living plant.

This quotation is so well known in the field that the modern period of comparative education is widely considered to start from him. With its distinctive strengths and expertise relating to context and culture as its core concepts, the field has always paid close attention to social, cultural, economic and political contexts. Looking into the future, the diverse and multidisciplinary traditions of comparative and international education make it especially well positioned to deal with the increasingly complex, global and cross-cultural issues that characterise the 21st century. The field has long recognised the significance of global forces in educational research and development, and has consistently examined the dilemmas associated with the transfer of educational policy and practice from one cultural context to another.

Globalisation has seriously challenged the way education policy is compared. This is because contemporary globalisation is reconstituting or "re-engineering" the power, functions and authority of national governments (Held et al. 1999, p.8). Given the changing global order, the forms and functions of the state have to adapt as governments seek coherent strategies to engage with a globalising world. Governments have become increasingly outward looking as they seek to pursue cooperative strategies (Rosenau 1997). At the same time, global agendas can only take effect when they are inserted into the policy and governance processes of established decision-making domains within nation-states. As Arnove (2003, p.3) puts, there is a dialectic at work by which these global processes interact with national and local actors and contexts to be modified and transformed. There is a process of give-and-take, an exchange by which international trends are reshaped to local ends.

Such interplay between the global and the local, denominated as the "global-local nexus" in the globalisation literature (Robertson 1992, p.100), gives further measure to

contexts, both local and global, in comparative education policy studies. Policy can only be understood, made and analysed in certain contexts. Hence, analysing policy is as much about understanding policy context as it is about understanding policy and policy processes.

With the increasing presence of policy networks and the geographical and conceptual border crossing of policy elites, efforts to globalise educational institutions have brought commonalities in the discourse on educational policy. However, this does not necessarily imply a trans-national convergence of policy and practice in educational institutions. Rather, when global trends are encountered in the local context, some form of hybridisation results from a combination of elements to make up the final programme package for policy transfer (Well 2005). The convergence or divergence one sees in education is the product of conscious adaptation, blind imitation, and pressure to conform (Stromquist 2002). Policies have undergone many transformations by the time they reach local educational institutions. The substantive elements of one programme, although successful in one location, may require a fundamentally different delivery mechanism for it to be effective in another. This 'missing piece' can be copied or emulated from a second location.

It is then erroneous to see the exponential rise of international policy transfer and convergence as a global trend in education. For example, uncritical policy borrowing across national boundaries has been evident in China's higher education. However, the importance of not glossing over the complex and often contradictory national and local mediations of 'global' policy trends must be stressed, since context-specific policy differences are forged. China's policy researchers have actively engaged with globalisation, but perhaps in a relatively uncritical manner. This suggests a need for caution and for a careful examination of the trajectories of education policy in China. There is a constant need to navigate the local within the global as policies evolve. The processes of globalisation are complex, contested and often contradictory. The concept of globalisation, when it implies policy homogenisation, is arguably too blunt an instrument for critical analysis of education reforms. Too few studies on globalisation processes are grounded in detailed examinations of particular historical times and geographical spaces (Yang 2002).

The critical role of context also undermines nation-states as the dominant unit of analysis in comparative studies in education policy. Policy transfer is not an independent process but is part of the wider policy process and shaped by such a process. While policy transfer primarily involves the state, other key factors, including international organisations, play a part.

The notion of the nation state is increasingly open to question, and intensified globalisation has challenged the prominence of the nation state as the primary unit of analysis in comparative studies in education policy. Global forces are dramatically changing the role of the state in education, and demanding increased attention to factors operating supra- and sub-national levels. National cultures can and do play a significant role in mediating global influences, but greater recognition is being given to other units of analysis (Bray & Thomas 1995). Units of analysis that pay attention to the local effects of localisation should be prioritised.

For example, it can be very misleading to treat China as a single entity in comparative higher education studies. Disparities receiving higher education between China's different geographical areas and social classes are evident. While 30 to 40 per cent of the age cohorts in major cities have an opportunity to receive higher education,

the percentage in remote areas is between 3 and 5 per cent. Disparities between urban and rural areas and between the rich and poor have historically been a longstanding issue in China. The gap has widened since the late 1970s when China opened itself to the world and exploited the coastal east.

Correspondingly, higher education development has been imbalanced: while between 1978 and 2000 the proportion of students grew rapidly in Beijing, Shanghai and Tianjin, the difference between these major centres and the remote areas including Tibet, Gansu, Qinghai, Ningxia and Guizhou widened. With the move towards marketisation, the capacity of local governments in financing their higher education development in more affluent areas such as Shanghai and Guangdong was often three times more than that in the inland provinces (Xie 2001, p.215). Higher education developed far more vigorously in the thriving export-oriented coastal zones than that in the interior.

The continuing dominance of Anglo-American scholarship

The international knowledge system of people and institutions that create the knowledge and of structures that communicate knowledge has divided nations into centre, semi-centre and periphery (Altbach 1998, p.193). Its function has been substantially strengthened by the exponential growth of the Internet (Farquhar 1999), and by the fact that English has become a global language (Crystal 1997; Watson 2001; Yang 2001). In many ways, knowledge that is not part of Western networks in mainstream journals, books, and other indices of academic production is not considered to be real knowledge. The most recent innovations in scientific communications, databases, and information networks are also located in the industrialised nations, especially in the USA. The worldwide scientific communications system is centralised and dominated by the research-producing nations.

The unequal international knowledge network has been manifested in comparative education policy studies. It is ironic that comparative education policy studies, as a field of research claiming to be defined by cross-cultural pursuits, can still be "impressively parochial" (Cowen 1996, p.165). This reflects the substantial dominance of Anglo-American scholarship in the English language. As Welch (2003, p.303) pointed out, this fact has long been lamented by European, Latin American and Asian scholars whose first language is not English. It means that significant theoretical tributaries from such regions, and even more so from the Middle East and Africa, often become only partly visible and after significant delays. Many indigenous theoretical contributions from such regions are marginal in mainstream comparative studies in education.

Since the effects of globalisation differ from place to place, attention needs to be drawn back to the nature and implications of the differential effects, even at the national level. Nevertheless, as noted above, few empirical grounded studies have compared these differences in any sustained way. Those that have been carried out have largely focused on Western industrialised societies. The impact of globalisation on the poorer, postcolonial societies of the 'South' has received much less attention, despite the dramatic implications for development processes in such contexts. For example, in today's interdependent wired world, the commitment by universities to advancing human knowledge means that they must engage in heightened international cooperation. Scholarship and teaching require an international approach, to avoid parochialism and

to stimulate critical thinking and enquiry into the complex issues and interests that bear on the relations among nations, regions and interest groups.

Meanwhile, against a backdrop of the aforementioned hierarchy of Anglo-American knowledge and the English language, Asian countries including China are competing for leadership in the global, technologically oriented knowledge economy. A critical mass of non-Western scholarship is emerging, and beginning to force a re-consideration of traditional concepts and theories (Masemann 1997; Swing 1997). Important research is now done at more centres of scholarship than ever before, helping to offset the hegemony of European and North American scholarship (Arnove 2003).

It is thus useful to study higher education policy in different countries, especially in Asia, to facilitate understanding of changing higher education landscapes. The striking economic success of East Asian countries includes a key focus on education, especially plans to develop world-class universities. The rise of Asian universities has potential to alter the world higher education landscape.

With the dominance of Anglo-American knowledge, Chinese policy researchers are increasingly looking to North America for ideas about institutions and policies and about how they work in other jurisdictions. Their references illustrate this well. Of the 114 education policy research articles carried during 2003-04 by *China Renda Social Science Information Centre-Education*, a significant Chinese journal that selects the best articles from a wide range of education journals nationwide and reprints them monthly, each article contained an average of 7.1 references. Among the cited items, 20.5 per cent were translated works, of which 159 (19.8 per cent of the total 803 listed references) were originally in English. The references in foreign languages numbered 71, among which 67 were in English (Yang 2006). The increase of foreign language references was dramatic, and an increasing number of articles rely almost exclusively on English-language resources.

While the dominant Western (mainly American) policy research and theoretical constructions have propelled China's policy research forward, a shortage of comprehensive, systematic studies of the imported Westernised theories and methods has led to superficial, fragmentary understandings of them. In practice, the application of these seemingly 'advanced' theories and methods often ends up with a blunder (Chen 2000). Without deep knowledge of their localities, indiscriminate use of Western theories and methods has failed to help China define, recognise and formulate policy problems, let alone provide effective solutions (Hu 2000). The identification of wrong problems could be a fatal mistake in policy analysis (Dunn 1988; Dryzek & Riply 1988).

This pattern poses a threat to the much-needed movement towards indigenisation in China. Policy research in that setting needs to understand both the strengths and the limitations of Western theories and methods, resulting from their specific times and spaces. Instead of making remarks as outsiders, Chinese policy researchers need to develop their unique perspectives and values based on rich local experience. This is an awareness of their local society and culture. Such a sense of locality would allow Chinese policy researchers to seize the initiative in identifying the real needs of their local societies, and to set up their own research agendas and targets.

The limited use of statistical methods

Comparative education policy study is a field characterised by eclecticism, despite pleas for coherence of focus and method (see e.g. Cummings 1999). It incorporates a

range of theories and methods from the social sciences and intersects with a range of subfields including political science, sociology, anthropology and economics, and educational planning and development (Wilson 1994; Rust et al. 1999). Positions within the field range from modernist certainties with essentialist views of reality and identity, to postmodernist destabilisations which view identity as mutable; from approaches which problematise systems to those which problematise actors; and from paradigms which emphasise structural relations, to those which focus on simulations and hyper-reality (Paulston 1999).

The last two decades of the 20th century were in many ways dominated by economic concerns that had a major influence upon social and educational trends and priorities worldwide. The focus of much social science research thus reflected the nature and tone of the dominant economic discourse, and the competitive, assessment and accountability culture that it generated. Comparative studies in education policy have been progressively oriented towards training needs, skills development strategies and the promotion of an efficient and adaptable workforce (Marginson & Mollis 2001). Much attention has been paid by policy makers, across a variety of contexts both in the North and the South, to the implementation of educational reforms, providing a focus for much comparative education policy research.

Some leading figures in the field have emphasised this. For example, Bray and Gui (2001) challenged much of the English-language literature by demonstrating the cross-cultural limitations of the generic Western phases formulated to represent the history of the field as a whole. They reminded readers of the work by Gu (2001), which contrasted strongly with the more empirical ‘scientific’ paradigm used to represent the post-World War II period by writers such as Noah and Eckstein (1969, 1998).

The character of policy and its making and the nature of policy analysis determine that statistical data are *not* much used in most of current comparative studies in education policy. This is for several major reasons. First, raw statistics ignore the human and cultural dimensions of a society, which for many comparativists, are at the heart of what they are studying. Second, the gross national product and per capita income data that are used by agencies such as the World Bank and United Nations Development Programme to classify the countries are typically national data and are essentially aggregated; they ignore regional variations and ethnic and linguistic disparities. Third, much is predicted on the belief that the key data source on population figures – the national census – is accurate. This cannot necessarily be guaranteed (Ninnes & Burnett 2003).

According to Neuman (2003, p.140) “qualitative research relies largely on the interpretive and critical approaches to social science” and critical researchers usually “give the historical context a major role, critique social conditions, and reveal deep structures of social relations”. Taylor et al. (1997) argue that “policy research is aiming to unravel the complexities of the policy process”, and that “a qualitative approach is most suited to policy analysis” (p.41). Qualitative researchers build theory by making comparisons. They “emphasize the social context for understanding the social world” (Neuman 2003, p.146). The meaning of social action or statement depends largely on the context in which it appears. The social meaning and significance will be distorted, if social contexts are not taken into consideration. In analysing any policy, its contexts should always be taken into consideration. Policy can be quite different in different contexts.

In the Chinese circle of education policy research, however, most researchers hold an objectivist view. They believe that understandings and values are objectified in

the people who are studying. Academic publications and official policy texts have demonstrated this belief clearly: if they take the right approaches, it is argued, they can discover the objective truth. This is also in line with the official stance (Shi 2004), although the reality of China's education policy research is a mix of traditional Confucian ethical sermon, Chinese interpretation of Marxism, and policy explanation and/or justification in line with governments (Xu 2002, p.450).

Internationally, preponderance to positivism and inadequate conceptualisation of the role of subjective perception and judgement has increasingly been recognised as a shortcoming in the literature (Dolowitz & Marsh 1996). People are becoming dissatisfied with the inability of Western science to describe all that occurs in people's experience of the world. Some have launched passionate attacks on the 'paradigmatic tyranny' of the natural sciences (Rahnema 2001), turning their thoughts to indigenisation. While the calls for indigenisation provide China's social scientists with a unique opportunity, China's education policy studies have displayed a positivist picture, demonstrating that Chinese researchers are attempting to emulate the Western objectivist epistemology.

The lingering bias

A major issue that needs to be recognised by those carrying out comparative studies in education policy is that of bias. For much of the 20th century, the field of comparative education was dominated by a Eurocentric bias. At the outset of the 21st century, the fluidity associated with increasing globalisation calls for greater appreciation of alternative perspectives which redress the biases inherent in those previously dominated by Europe and North America. Many scholars in the field originated in the West, while many non-Western researchers were trained in Western institutions. Their research interests were, for the most part, motivated by the normative concerns to improve their own educational systems and modernist desires to help the 'South' to achieve development.

Bias may be based on researchers' prejudices, or their implicit values and preconceptions. For example, Pan (1999, p.1676) uses China's currently most influential translated works on comparative higher education from English, Japanese and Russian as examples to show convincingly that all the authors were subject to their ideo-political stances.

Comparative education policy researchers are all conditioned by their upbringing, culture, education, environment, status and perceptions of how others view them, as well as by their political, social and religious values and attitudes. All researchers, but especially those involved in research on the travelling of education policy across cultures or across national boundaries, need to be aware of such potential biases and assumptions that they bring with them. Inevitably this will influence how they view the 'other', and how they document the similarities and differences that they perceive in different cultures. Such biases are not always easy to recognise, let alone overcome.

Bias may also stem from the way in which existing data are formally presented. In other words, it can be both personal and 'official'. Government statistics, publicity brochures and official publications often seek to portray systems or countries in the most favourable light. In the international arena, a country which wants to attract overseas development assistance may show the economic or educational picture to be

worse than it is; but if it wants to impress foreign investors or its own electorate it will portray things to be better than they really are.

Moreover, much comparative education policy research is now commissioned by governments, international organisations or private educational charities. These each have their own agendas and often want to commission consultants or researchers for their own ends, either to propagate particular theories or to advance a set of policies (Samoff 1996).

One related yet somewhat different issue concerns a distinction between government policy rhetoric and reality. This is particularly the case in China with a tradition of the Chinese ancient scholar-gentry as a tool in the service to the ruling class. None of the 114 policy research articles published in the aforementioned journal offered any real criticism of the government (Yang 2006). On the contrary, many sang the praises of government policies. While going much further, the Chinese situation confirms Popkewitz and Lindblad's (2000) criticism towards the literature in general that education policy research tends to accept the discourses of policy as the governing structures for research, and becomes bound to the policy makers' definition of the problem, taking the categories and problem definitions derived from governmental policies as the problems of research without any serious intellectual scrutiny.

Such a shortage of independent, critical thinking also results from lack of awareness of the above issue. In this regard, Pan's (1999, p.1677) seminal warning, which first appeared in 1991, remains appropriate today:

> Attention should be paid to comparing the actual practice in different countries, rather than only the analysis of their policy documents. Policy documents are an important source, but not the only one. What is written in policy documents manifests the intention of the governments, and is usually far from the reality. Such difference is even more striking in countries with less centralised educational systems…. Entire reliance on government policy documents would be very misleading…. We have to pay close attention to analysing information from all possible sources to gain a understanding that is more geared to actual circumstances, even if they might be odd bits and appear to be contradictory to each other.

Conclusion

To conclude, it is worth reiterating Ball's (1997, p.15) emphasis that the meaning we give to policy affects how we research and how we interpret what we find. However, policy is so difficult to define that Kenway (1990, p.6) suggests it is more productive to think about 'the policy process', which involves a great deal of settlement, mostly political as well as economic and social, and is replete with differences in value orientation and unequal power relations. Policy is thus a process fraught with choices, and involves adopting certain courses of action while discarding others. It is the product of compromises between multiple agendas and influences, over struggles between interests in context. These struggles are generally conducted through discourses where conflicting points of view are heard or unheard by the policy makers.

Through settlements and the other activities involved in policy development, the resulting policy text is quite modified from the original draft, as Rabb (1994, p. 24) has

points out, "the pudding eaten is a far cry from the original recipe." With the increasing interdependence of countries, the emergence of transnational issues, and the growth of international organisations, comparing and sharing policy experience to resolve local problems becomes a necessary and an inevitable process. By the time policies reach local educational institutions, they have been transformed many times.

The popular childhood game 'telephone' serves as a useful metaphor. In this game, one player whispers a message into a neighbour's ear. The action is repeated until each player has communicated the message, and the last one reveals it to the entire group. The message by the first person often undergoes a significant transformation by the time it reaches the last person, especially if the utterance is complex. A similar process occurs when educational policy constructed by global or transnational networks is transferred to regional, national and local levels (Well 2005).

Nevertheless, comparative education policy research is still littered with examples of the imposition of 'one size fits all' development model and inappropriate application of 'world standards'. It remains quite difficult to argue with some foreign consultants in developing projects, especially with foreign donors, that not all research instruments that work in some part of the world also work in the others.

Critical analysis of the global rhetoric is then needed at all levels of the policy-making process. The appropriate methods chosen to conduct such analysis vary, based on the different purposes of doing policy analysis, the policies themselves, the backgrounds of researchers, and the contexts in which the policies operate. The sorts of questions asked in policy analysis depend on its purpose, the position of the analyst, and the presence of constraints on the analyst (Taylor et al. 1997). Therefore, making judgements by applying one set of criteria to all policies is inappropriate and perhaps unattainable given the differing ideologies of differing analysts within the complex task of policy analysis. While meeting the above prerequisites does not necessarily guarantee best uses of comparative education policy, failure to achieve even one of them certainly leads to abuses.

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