Globalisation in Education: process and discourse

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ABSTRACT The article draws on comparative analyses meant to investigate both the degree and the dimensions of the 'internationalisation' of educational knowledge in societies that differ considerably in terms of civilisational background and modernisation path. In so doing, the article seeks to put forward two essential ideas. These refer, first, to the importance that educational discourse plays in shaping the educational reality of the present-day world. In this sense, in educational research as in social science in general, the (increasingly numerous) analyses of the socio-economic *processes bringing about* world society have to be complemented by (hitherto under-represented) research into the *semantic construction of* world society. Secondly, taking the above analyses and their conceptual design as an example, the article is meant to underscore the theory-dependency of our observations on, and of the resultant knowledge of, phenomena and processes of globalisation.

Communication Context Globalised

The processes of 'globalisation' and 'internationalisation' have become salient features of the contemporary world. Though particularly prominent in the economic sector, these processes are by no means restricted to economic exchange relations, scientific and technological competition, communication media, or tourism. They obviously also apply to the field of education and educational reform. Indicators of the growing intensification in international communication and cooperation networks in the areas of educational research, educational planning, and educational policy development are as numerous as they are impressive.

These are, first of all, institutionalised procedures such as the International Baccalaureate, international assessments of school attainment (cf. Shorrocks-Taylor & Jenkins, 2000; Baumert et al, 2001), or the recent constitution of a World Education Market (*Le Monde,* 2000) working with

significant financial resources. But also, secondly, international governmental organisations such as the World Bank, the United Nations Educational, Scientific and Cultural Organization (UNESCO), the International Bureau of Education, the International Institute for Educational Planning, the Organization for Economic Cooperation and Development, or the Council of Europe (World Bank, 1991; UNESCO, 1996) are engaged in research, documentation, communication and developmental activities on a wide scale. The list of indicators can be continued with, thirdly, congresses and conferences, which have gained an almost self-propelling momentum and contribute to fuelling the global dissemination of educational policies and models. Central actors, moreover, in these globalised congress activities on issues of education and development, educational planning, or economic effectiveness of educational innovation and reform, are a large variety of international academic associations for educational research, administration and development – the World Association for Educational Research, the European Educational Research Association, the World Council of Comparative Education Societies or the International Academy of Education, to name but a few – and the body of experts and consultants representing these associations. These experts, including the analysts of The World Crisis in Education, (Coombs, 1985), architects of a world educational agenda (Psacharopoulos, 1987), prophets of a 'sense of global responsibility' (Gelpi, 1992), compilers of World Education Indicators (Komenan, 1987), or editors of World Education Encyclopedias (Kurian, 1988), function as contributors to an equally globalised discourse on educational reform. Finally, the international academic associations represent a segment, and not the smallest one, in a much broader range of international non-governmental organisations (INGOs) devoted to science (science INGOs), whose number has been growing exponentially over the past few decades. It is science INGOs who not only contribute to the transcontinental methodisation and rationalisation, hence the standardisation and homogenisation, of their respective fields of study, but also to the corresponding scientificisation of the areas of social life these fields are concerned with (Schofer, 1999).

Indicators such as the ones just listed, however incomplete they may be, come towards meeting major insights derived from recent research and theory debate:

(1) International or global interconnectedness, be it in the field of economic exchange relations, in politics, or in the cultural arena, is by no means a novel phenomenon. Global flows and networks – the spread of world religions, the expansion of imperial systems, long-distance trade, migrations, and inter-civilisational encounters – can be traced back to pre-modern times. What is new, and unprecedented in world history, are the intensification and acceleration of such flows, and of attendant transformations of social organisation in nearly every field of activity nearly everywhere across the globe (Held et al, 1999). Moreover, notwithstanding the importance of commodity exchange, it is the remarkable speeding up of knowledge flows

fostered especially, though not exclusively, by science INGOs, and facilitated by modern information and communication technologies, that plays a major role in those transformations.

(2) Accordingly, largely independent of global flows and networks, or of the trans-national convergence of typical patterns of organisation and exchange, there has been – and continues to be – ongoing discussion on internationalisation in national reform debates, be these on public policies, cultural innovation, or educational reform. Couched in constructs such as 'world models' (e.g. Chalker & Haynes, 1994), 'international standards' (illustrated by Hanf, 1980), or 'global development trends' (transformed into an interpretive scheme by Roselló, 1978), moreover, this discussion tends to precede the actual process of internationalisation or globalisation. In this sense, the realm of sociohistorical processes (characterised by tension-filled complexity) must be distinguished from the realm of reformative discourses (which not only reflects, but, in turn, takes a life of its own and impinges upon these processes). *Evolutionary processes* leading *to* world society have, in other words, to be distinguished from the *semantic construction of* world society.

(3) Finally, comparative and international research in education and the social sciences has convincingly thrown into relief the conflict-laden character of globalisation processes. These are far from being governed by some kind of uni-linear rationality or predetermined historical logic. What seems to predominate, instead, is the simultaneity of contrary currents – of internationalisation and indigenisation; supra-national integration and intra-national diversification; or the global spread of standardised educational models (regardless of differing societal settings) and the surprising diversity of sociocultural interrelationship networks (in spite of the universalist assumptions of grand theories) – which are connected to one another as challenge and response, as large-scale socio-economic processes and these processes' unintended consequences. Likewise, international encounters, transfer, and migration do not just lead to an increasing convergence of Western political, cultural, and educational models. There seems to be at work, rather, an intricate dialectics of adoption (of those models) and rejection (according to culture-specific patterns of meaning), which gives rise to an unexpected complexity of 'missed universalisation and creative deviation' (Badie, 1992). Thus, as spelt out in some detail elsewhere, numerous lines of research lead to the suggestion that there is *an abstract universalism of transnationally disseminated models,* which *fans out into multiform structural patterns* wherever such models interact, in the course of their intellectual adoption and/or institutional implementation, with differing state-defined frameworks, legal and administrative regulations, forms of the division of labour in society, national academic cultures, context-bound social meanings, and world views shaped by religious beliefs, philosophical traditions, or ideological systems (Schriewer, 2000).

Contrasting Theory Perspectives

Such is the background for cross-cultural analyses currently carried out by Humboldt University's Comparative Education Centre. I refer to these analyses all the more as they allow me to highlight two important aspects. First, they focus, not just on socio-economic data, but instead on the level of educational discourse, i.e. on meanings-based social communication on and the systemic self-interpretation of educational systems. Our analyses thus focus on a level of reality that, though often neglected in cross-cultural studies, is crucial to comprehending social reality's inner workings and development. Secondly, taking these analyses and their conceptual design as an example, it becomes possible to underscore the theory-dependency of our observations on, and the resultant knowledge of, globalisation phenomena and processes more generally.

The cross-cultural analyses in question are meant to investigate both the degree and the dimensions of the 'internationalisation' of educational knowledge. The units of comparison they cover are societies as distinct in terms of cultural background and modernisation paths as Spain, Russia (the USSR), and China. The aims of these analyses are twofold. First, they are meant to describe from a sociology-of-knowledge perspective typical patterns of the educational knowledge published by representative Spanish, Russian (Soviet), and Chinese education journals over a period ranging from the early 1920s to the mid-1990s. These patterns refer to processes of the construction and reconstruction of international reference horizons and historical interpretations, respectively, which were – and continue to be – embedded in such knowledge, on the one hand, and, on the other hand, to the receptivity of national debates on educational reform to international models, ideas, and theory developments. The findings so identified are then used to re-examine, by means of both cross-temporal and cross-cultural comparison, some of the assumptions linked with world-system theory, and contending the worldwide institutionalisation of standardised models of education and educational development. By this is implied that our research was defined against the backdrop of distinct lines of social theory. Each of these lines of theorising has proven fruitful for informing analyses not only of the emergence of world-level phenomena in polity, society, and education, but also of the role that educational knowledge has played, or is capable of playing, in such processes.

Thus, on the one hand, we take special reference to a phenomenological and culturalist version of world-system theories which has been developed by a group of researchers around John W. Meyer, Francisco O. Ramirez and others at Stanford University (Boli & Ramirez, 1986; Thomas et al, 1987). This approach conceives of the 'world system' primarily in terms of an emerging 'world polity' and a corresponding 'trans-national cultural environment'. The 'neo-institutionalist conception,' as it has come to be called, offers empirically well-grounded and intellectually inspiring explanations for the worldwide convergence of patterns of educational organisation, of school curricula, and of patterns of expansion taking place on all levels of education systems (cf.

Meyer & Ramirez, 2000). Furthermore, these authors suggest the dissemination of a 'world level developmental cultural account and educational ideology', which is understood to increasingly influence and shape the conceptions of educational actors – politicians, planners, administrators, teachers, unions as well as the general public – and to direct education-related decision making (see Fiala & Lanford, 1987). This ideology, they explain, has emerged from the combination of the key concepts that have shaped the self-interpretation of European modernity from the eighteenth and nineteenth centuries onwards. Above all, these concepts, or 'institutionalized legitimating myths', include the ideas of (a) individual personality development, citizenship, and participatory competence; (b) the equalisation of social and political opportunities; (c) economic development and national progress; and (d) a political order guaranteed by the nation-state (Ramirez & Boli, 1987). Following the dynamics of European expansion, this ideology has, with increasing intensity over the twentieth century, had an impact on the conceptual frames for education and development policies, and on the educational aims defined by national constitutions and basic education laws across all continents. It has, the Stanford group maintains, acquired the status of an institutionalised vision for the modern world, an account that is taken to accompany, support and promote modernisation and development processes which go on, however uncoordinated, in all parts of the world. Not least, the neo-institutionalist model developed by the Stanford group highlights the central role which professional educational research, closely intertwined with fields like psychology and economics, has come to play, through its representatives (researchers, experts and consultants), communications (publications, papers and speeches), and communication media (journals, series, and congresses), in the international dissemination of theoretical approaches, methods, educational agendas and organisational models (Meyer & Ramirez, 2000, p. 119).

On the other hand, the emergence of modern world society has been conceptualised in the larger framework of the theory of self-referential social systems developed by German sociologist Niklas Luhmann. In the context of this theory, which stands out due to its association of general systems theory with evolutionary theory and communication theory, the model of the 'functional differentiation of society' plays a major role. It includes both conceptual explanations and historical analyses meant to account for the characteristic pattern of modern – essentially Western – society as it has emerged from the sixteenth century onwards. Much in line with the neo-institutionalist conception, thus, the emergence of world society is seen as both a consequence and a correlative of Western modernity. More specifically, the dynamic momentum, intrinsic to each of the functionally specific subsystems of modern society, entails that these subsystems tend to expand their specialised communication – long-distance trade, stock-market interaction, scholarly congresses, technological cooperation, artistic creations, or the sentences and claims of international courts of justice – irrespective of

geographical space and political frontiers. In other words, seen from the vantage point of evolution, the primary scheme of societal differentiation on the basis of particular functions to be fulfilled at the level of society and the emergence of world society tend to mutually support and reinforce each other (Luhmann, 1982).

These concepts, at the same time, include a genuine sociology-of-knowledge perspective. This follows from the fact that the guiding concepts of Luhmannian theory – such as 'self-reference', 'reflexivity', and 'reflection' – conceptualise networks, processes, and organised fields of sociocultural activity as a meanings-based social reality that observes and describes itself, and uses its self-descriptions to organise itself. Accordingly, educational theorising is understood largely, though not exclusively, as the self-referential reflection *of* society's particular subsystem for education pursued *within* that system. As such, educational theorising is rooted in and determined by the varying contextual conditions, the particular problems and issues, and the distinct intellectual traditions and value systems characteristic of its respective system of reference and the related context of reflection. Educational theorising, in other words, always links up with, and elaborates further, structures that work as 'self-determinators for change' (Luhmann & Schorr, 1979, p. 13).

Finally, a core concept that needs emphasising in this connection is that of 'externalisation'. According to Luhmann and his educationalist co-author Schorr (1979, p. 341), it may be used as a 'key to analysing educational theory building'. As spelled out in greater detail elsewhere (Schriewer, 1992, 2001), this concept is well suited to analysing in particular the characteristic modes of educational reasoning that are related to international developments and theory traditions in education respectively. Thus, 'externalisation to world situations' is a style of arguing typically found in bodies of knowledge conventionally called 'Education Abroad', 'Comparative Education', 'International (Development) Education', or 'Educational Policy Research'. In contrast to comparative enquiry proper, this style of arguing does not primarily aim at a social science analysis of cultural configurations. It involves, rather, the selective description and synthesising interpretation of international phenomena for issues of educational policy or ideological legitimisation. Likewise, 'externalisation to tradition' is the pattern of argument no less typically embedded in large parts of the literature conventionally titled 'History of Education' or 'History of Educational Ideas'. This pattern of argument is not directed at actually historicising educational theory traditions or experiences. It reacts rather to the need to reinterpret and actualise these traditions' theoretical and/or normative potential in the face of present-day concerns of educational theory building, policy development, or professional orientation. The externalisation concept, then, is instrumental in deciphering the hidden logic underlying these styles of argument, viz. to provide justification and legitimisation, to give orientation, or – couched in sociological terms – to sift out 'supplementary meaning' to educational system-reflection.

Moreover, the concept may also serve to analyse, across different time periods and national reflection contexts, the alternating 'reference societies' (Bendix, 1978), world views, and visions of history, respectively, that are constructed and reconstructed in the context of varying national societies' system-reflection.

As outlined above, both lines of theorising, the neo-institutionalist strand of world-system theory and the model of systemic self-reflection pursued within self-referential social systems, share a genuine sociology-of-knowledge orientation. They do not only depict central ideas and societal self-interpretations as emerging from processes of social change, but they also underline the important role such ideas and interpretations play in the ongoing organisation of social reality. In that sense, both theories are – as Meyer and Ramirez have couched it – 'culturalist in character' (Meyer & Ramirez, 2000). Despite such similarities, however, these alternative theories invite analytical approaches that focus on largely different phenomena:

1. In terms of perspective, first of all, world-system models such as the Stanford institutionalist conception focus on the evolutionary dynamics propelling world-level integration and standardisation. Accordingly, they emphasise the interconnection of *one* world. The externalisation concept, on the other hand, focuses on the socio-logic inherent in intrasocietal reflection processes, and in semantic constructions devised in the context of these reflections. Consequently, this concept stresses the idiosyncrasy of meaning in specific nations, societies, or civilisations and, in doing so, brings into relief the persistence of *multiple* worlds.

2. As a consequence of its basic assumptions, then, the neo-institutionalist conception emphasises the global *dissemination* of principles, models, and institutionalised ideology. The system-reflection model, in contrast, highlights the *adoptive mechanisms* that are operative in varying national reflection contexts. More specifically, the externalisation concept calls for particular attention to the interpretative reception and transformation, within the educational discourses of different nations or societies, of relevant world situations, bodies of knowledge, and educational models that have taken shape at the international level.

3. From the world-system perspective, the global states system is conceived of as an 'integrated world stratification system'. It is understood as an objectively given *structure of reality*, which, taken for granted, is expected by all probability to pre-determine relevant reference societies, model-states, and 'core national educational systems' (Meyer & Ramirez, 2000). From the perspective of the externalisation concept, in contrast, it is system-related reflection that selectively emphasises certain societies and their institutions with a view to transmuting them into standard-setting models. *Semantic constructions* of this kind, to be sure, are not completely disconnected from structures predominant in the international arena. However, externalisations allow for a high degree of liberty of selecting and evaluating international model societies and their institutions. Their selective and interpretive

potentials have the force to break up the seemingly objective order of standing involved in an 'integrated world stratification system' and rearrange it according to a given system's internal needs for 'supplementary meaning'. This is linked to the fact that externalisations do *not* mean the objective cognition of a system's environment, but, rather, its system-referential interpretation. As illustrated by the metaphor of a 'floodgate' frequently used in this connection, externalisations make accessible both a system's international environment and its historical antecedents only in a filtered form, and in accordance with changing system-internal needs for 'supplementary meaning' (Luhmann, 1981).

4. Due to its diffusionist stance, the Stanford neo-institutionalist model has always favoured research designs taking into consideration, if data were available, *all political entities recognised as nation-states* – e.g. all United Nations (UN) or UNESCO member states – including those nations that have gained independence only in the recent past. The reception-centred perspective of the Berlin analyses, in contrast, requires a careful *selection of units of comparison,* which, though few in number, nevertheless represent a maximum range of sociocultural, political, and economic variation. More specifically, our project is concentrated on analytical units that display a distinctive sociocultural profile, which has been built up over long periods of time and which is underscored, *inter alia*, by political power and/or demographical weight. Accordingly, we do not concentrate on new nation-states such as Botswana, which serves as a prime example in support of the neo-institutionalist theses (Meyer et al, 1993), but on countries such as Spain, Russia (the Soviet Union), and China. These countries represent regions of different civilisational background: Western Europe bearing the imprint of Roman law and Latin Christendom, Eastern Europe with her Orthodox background, and East Asia moulded by Confucian and Buddhist traditions. In addition, all three countries, after contested modernisation processes from the nineteenth century onwards, went through a sequence of fundamental political and societal transformations in the twentieth century. Our research design thus makes it possible to combine cross-national with cross-temporal analysis, investigating not only the construction processes of international reference horizons, but also the reconstructions and transformations these reference horizons have undergone in the course of changing political regimes over time.

5. World system analyses, as a consequence of their global approach, are typically based on *highly standardised source materials* such as constitutions, major legislations, textbooks, UN statistics, and others. Due to the large amount of cases scrutinised, they have naturally tended to focus on data series that can be managed by merely quantitative techniques. The externalisation perspective, in contrast, involves assumptions that can only be examined on the basis of much more differentiated data. Accordingly, the research carried out by the Berlin team has tried to apply a *detailed content analysis* to the specialised *knowledge production* communicated by representative Spanish, Russian (Soviet) and Chinese education journals.

Multiple Constructions of Internationality

Expectedly, research findings produced in the light of alternative theoretical frameworks differ considerably. Even when summarised in a very condensed form (see, however, the detailed tables and interpretations in Schriewer, 2003; Schriewer et al, 2003), the data series collected by the Berlin 'Multiple Constructions of Internationality' project do not reveal much of an increasing alignment of the reference societies, world views, and corresponding reform options embedded in the three societies' educational discourses with presumed world-level patterns. Rather, our data manifest significant variations concerning the preference given to either the historical or the international aspects of education; the reference societies and 'world-class' models constructed; the patterns of evaluation used for the interpretation of these aspects, societies, and models; or the kind and the extent of international knowledge adopted into national reflection. These variations are not only discerned *between* the Spanish, Russian (Soviet), and Chinese educational discourses, but they are also identified, in terms of considerable fluctuations over the whole period under scrutiny, *within* each of these discourse constellations. Moreover, these fluctuations – e.g. from strong concerns with international issues and developments to an outlook almost exclusively centred on issues of merely domestic national or ideological concern – do by no means reflect some kind of irresistible dynamics tending towards the international convergence of educational knowledge. They correspond, instead, to radical transformations in the respective countries' political systems and dominant ideologies.

Likewise, the rankings of most frequently cited authors, even when considered in merely quantitative terms, manifest significant *differences between* the Spanish, Russian (Soviet), and Chinese patterns of adopting international knowledge into the respective country's national discourse on education and educational reform. More than that, these rankings also testify to the enormous *distance* that the Spanish and, particularly, the Russian (Soviet) and Chinese patterns of adoption show *in relation to* the intellectual positions of an international reference work par excellence such as *The International Encyclopedia of Education* (Husén & Postlethwaite, 1994). This distance is all the more significant considering this encyclopaedia's intellectual orientation, which is definitely based on quantitative research methods and on insights derived from educational psychology and the economics of education, an orientation in other words which exactly fits the model of a scientistic style of educational research as assumed by the neo-institutionalist conception. Finally, a more detailed qualitative examination of the intellectual positions represented by the most frequently cited authors reveals configurative patterns, embedded in the nation-specific citation profiles, which vary significantly across the national discourse contexts under study while largely displaying intranational consistency. These patterns point to the existence of a distinctive problem orientation in each of the three discursive spaces, a problem orientation which – much in line with more general assumptions

about the nature of reception processes (cf. Bourdieu, 1990) – functions as a 'filter', selecting, channelling, and transforming non-national knowledge into national meaning structures.

Clearly, the findings reported so far may still seem too preliminary to draw strong conclusions, let alone to bear refutations. Nevertheless, these findings show much stronger fluctuations from periods of strong international receptiveness to those of sociocentric seclusion, *integrated in* each of the nation-specific discourse developments, and much bigger differences regarding major reference societies or 'world views' *between* these developments, than would be compatible with the neo-institutionalist model. Contrary to the assumptions about the growing institutionalisation of a 'world cultural environment' regardless of diverging political and social contextual conditions, the sequence, determined by our data, of radical changes in a country's social and political system and corresponding fluctuations in its decisive trends of reflection, clearly underlines the sustained impact of exactly those contextual conditions. In this sense, our findings conspicuously throw into relief the interrelations, characteristic of externalisations in educational reflection theory in general, between changes in a society's social and political system, changing imperatives for educational reform, and corresponding shifts in the overall tendencies of reflection on education and educational policy development. These findings convincingly point out how development trends, models of educational organisation, reform options, and bodies of knowledge that have taken shape, and are disseminated, at the international level are refracted by selection thresholds and needs for interpretation which are the outcome of, and have been determined by, cultural, religious, political, or ideological forces and traditions intrinsic to each of the societies under study. In other words, the basic patterns underlying these findings are governed much more by the *socio-logic of externalisations* than by *evolutionary forces leading to worldwide standardisation*. So far, they underline much more the varying needs for 'supplementary meaning', as determined by distinct cultural, political or ideological settings, than the triumph of a 'world-level educational ideology' substantiated by economic rationality.

Conclusion

Let me bring to an end these considerations by a threefold conclusion, thus talking as a scholar, as an educationalist, and as citizen:

1. As indicated, the research findings reported above may be strong enough to call into question, but not yet substantial enough in order to refute, pertinent assumptions formulated within the larger framework of world-system theory. What is needed, in education as in other areas of sociocultural action, is further research. This means, above all, carefully conducted research on the processes, the agents, the contents, and the forms both of the transnational and transcontinental dissemination and of the nation-specific adoption, interpretation, and transformation of knowledge, models, and

policies. This means also, however, cross-national and cross-cultural research conducted from intellectual perspectives other than merely Western ones.

2. As far as the future of education is concerned, one cannot but emphasise the necessity to focus on what has been identified, in theoretical terms, as the very 'function' of educational systems. According to Luhmannian theory of social differentiation, this 'function', as distinct from an educational system's 'outward performances' for other fields of social action, consists in *assuring each individual's capacity for society-wide communication*. While it is possible to trace the pertinence of such a definition back to the establishment of national systems of education in the nineteenth century in connection with requirements for the homogenisation of nation-states, present-day communication requirements extend well beyond national frontiers. The complexity of present-day social realities – be this in economic or political life, or be this in the areas of science, technology or culture among others – requires an individual's capacity for society-wide, i.e. area-encompassing, communication to be operative at all levels, the local, the national, the regional, and the world level. This certainly presupposes strengthening linguistic skills; this also presupposes, however, developing appropriate mental attitudes; finally, this presupposes assuring the proper understanding of the basic 'languages' – scientific, technological, social, political as well as artistic – which prevail in today's world.

3. It is undeniable that globalisation takes place as a large-scale, all-encompassing process which, while conflict-laden and rich in contrary currents, is both the consequence and the correlative of modernity. However, considering the realisation, in different parts of the world, of 'multiple programs of modernity' as shown by comparative-historical research (Eisenstadt, 2000), globalisation is not to be conceived of as a kind of blind fate. It is susceptible of 'multiple programs' as well. Taking also into account the tremendous importance of discourse in shaping social reality, comparative scholars and specialists in international education as well as educational experts, planners, and administrators should be aware of the fact that, by means of the analyses, interpretations, ideas, and models they produce, they at any rate contribute to shaping the discursive space, hence tomorrow's reality, of their respective nation.

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